

## FACULTY COUNCIL SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Schulich Faculty Council for the 2024-25 academic year  
will be held via Zoom on **Friday, April 25, 2025** from **11:30am – 1:00 pm**.

### AGENDA

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|--|-----|
| <b>1. Welcome and Chair's Remarks</b> (5 minutes)  |     |
| <b>2. UBS, GBC, PhD Student Remarks</b> (5 minutes)  |     |
| <b>3. Dean's Remarks</b> (5 minutes)   |     |
| <b>4. Research Publication Options &amp; Researcher Visibility</b> ( <i>J. Dupuis</i> ) (15 minutes) |     |
| <b>5. Deferred Final Exam Fees Memo</b> ( <i>K. Tasa</i> ) (10 minutes)                              | 3-5 |
| <b>6. Other Business</b>   |     |
| <b>7. Adjournment</b>  |     |

### Consent Agenda

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

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# Memo

## DIVISION OF STUDENTS

Office of the  
University Registrar

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[currentstudents.yorku.ca](http://currentstudents.yorku.ca)  
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To: Associate Deans, Academic Standards, Curriculum and Pedagogy  
Committee (ASCP)

From: Frankie Billingsley, Associate Registrar & Director Student Records &  
Scheduling

Date: March 26, 2025

Subject: Information and Feedback to Faculty Colleagues regarding Fees for  
Deferred Final Exams

## Background

There have been a number of conversations with Associate Deans over the last 18 months about implementing a deferred final exam fee that will come into effect for the Fall 2026 term. It is not uncommon for institutions around the country to have a fee to cover the administrative costs of hosting an additional exam other than the one already scheduled in the official examination period.

Typically, when proposing major changes – the campus community likes to have some context about what the other GTA universities are doing in this regard. Given this propensity for information, the University of Toronto and Toronto Metropolitan University are both charging \$73.50 per deferred exam with a maximum charge per exam period of \$147.00. Both of these universities require supplemental documentation to be submitted which can substantiate the deferred exam request.

## Decision

York would charge \$50.00 per deferred exam, up to a maximum of \$100.00 per examination period. This deferred exam fee will only cover those classes that have final exams that are scheduled through the Office of the University Registrar. The fee will not be applied to take home exams, final papers or projects. In order to be approved to write a deferred final exam, the student will still need to submit substantiating documentation (an attending physician's statement) which supports the request.

ASCP has already agreed in principle to the creation of a new grade of "Incomplete" for all undergraduate students. The current Deferred Standing



Agreement forms will be updated and amended to reflect this change – the new title will be “Incomplete Standing Agreement”. In essence, these agreements will work the same way the current form does with the exception that official final exams that are scheduled through the Office of the University Registrar will not be covered any longer and the student will need to engage in the new deferred final exam process.

### **New Process**

Students will fill out an online form that asks them which exams they have missed or will miss during the official final examination period. Completion of the form will take the student to step #2 – uploading the substantiating documentation. Once the form and the documentation are submitted, staff in the Records & Scheduling unit will review and approve. Upon approval of the documentation, students will be notified that they have proceeded to step 3 which is payment of the \$50 fee, up to a maximum of \$100 fee, to complete the process. Once all 3 steps are completed – the Academic Scheduling unit will be notified to schedule a deferred exam for the approved student within the new deferred examination period.

### **New Deferred Examination Periods**

The advent of this fee will allow the academic scheduling team to build into the sessional dates an official deferred examination period. This will occur on the 2<sup>nd</sup> and 3<sup>rd</sup> weekends of the subsequent term. For example, a deferred final exam from the Fall session would be scheduled in the second and third weekends of January. Exam ~~monitors~~invigilators from Departments will be required during this period.

### **Impacts**

Positive impacts to adopting this fee may include a decrease in deferred examinations, shorter timelines to course completion and, an increase in our retention rates. York has a large volume of deferred grades at any given time and some of these remain on student records for months after the term has ended. It is not to a student's advantage to write a deferred exam 4 or 5 months after the content has been delivered and, it makes academic progression very challenging if outstanding grades are required for pre-requisites. Having an official deferred examination period will decrease the number of deferred grades that remain outstanding for months and months. We should see a decrease in the number of deferred grades on student records after this fee is implemented. After the deferred examination period passes, if there is no other grade available the “DEF”

grade will be changed to an “F” to indicate that the deferred exam was not written. This is the current practice and standard in the sector.

### **Exceptions**

As with all processes and procedures, there are times when exceptions need to be made. Alternate exams, scheduled through the Student Accessibility Services, and/or a conflict due to a Religious Observance will not be charged the fee.

There may be instances where a Course Director feels that the deferred final exam fee is going to cause undue hardship on the student. In consultation with a Faculty Associate Dean, an exception can be made to waive the fee. In these instances, the Associate Dean would notify the Associate Registrar, Student Records & Scheduling, copied to the Academic Scheduling Unit that a deferred final exam is required for a student and the fee is to be waived. All data related to deferred exam requests and exceptions will be tracked for review.

Scenario A – student has an incomplete paper, and they will not be able to write the final exam when it was scheduled? What do they do? Their course director agrees and signs an incomplete standing agreement form and asks them to go to the website to fill out the form to request and pay for a deferred final exam.

Scenario B – student has a large project due at the end of the semester. They are fairly confident they are not going to be able to hand it in on time. The Course Director follows their department procedures whether this means providing an extension and, if so, fills out an incomplete standing agreement with the student.

### **Governance**

This is being shared as an information item so that faculty colleagues are aware of the changes that are coming. Given that there is no policy at York that governs deferred exams, this administrative fee and subsequent changes will not come forward at Senate. We hope we can count on your support in sharing this information with your faculty colleagues to prepare them for the upcoming change. If you or your colleagues would like to provide feedback to help support a successful implementation, we look forward to your insight. Feedback can be provided in the Faculty Council meeting, to their Associate Dean (Students or Academic) or to Frankie Billingsley (Associate Registrar, Student Records & Scheduling) at [frances4@yorku.ca](mailto:frances4@yorku.ca).

# The Senate of York University

## Meeting Synopsis

The 715<sup>th</sup> Meeting of Senate held on Thursday, 27 March 2025, via Zoom

### Remarks

#### President

The President reported on York's response to the Ontario Auditor General's 2023 Report outlining the financial sustainability measures and governance improvements being undertaken in response to the report's recommendations; the University's *York U Forward Action Plan*; and ongoing negotiations related to Strategic Mandate Agreement 4 (SMA-4).

### Inquiries & Communications

A communication from the Council of Ontario Universities (COU) was received from the Academic Colleague to COU.

### Approvals

On recommendation of the Academic Policy, Planning and Research Committee revisions to the *Senate Policy on Responsible Conduct of Research*, effective July 1, 2025.

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

- establishment of a Bachelor of Engineering in Mechatronics degree program, Lassonde School of Engineering, effective FW'25
- closure of the York-Fleming Dual Credential program in Sustainable Environmental Management, Faculty of Environmental and Urban Change, effective FW'25
- a Collaborative Graduate Interdisciplinary Specialization in Vision Research, Department of Psychology, Faculty of Health, effective FW'25
- a new Global Mental Health Stream in the Specialized Honours BA and BSc degree programs in Global Health, School of Global Health, Faculty of Health, effective FW'25
- a new Nursing Leadership and Care of the Older Adult Stream in the Honours BScN degree program, School of Nursing, Faculty of Health, effective FW'25
- establishment of a Disciplinary Certificate in Social Justice and Community Engagement: Sport, Physical Activity & Health, School of Kinesiology and Health Science, Faculty of Health, effective FW'25

# The Senate of York University Synopsis

- minor revisions to the *Senate Policy on the Conduct of Examinations*, effective 1 September, 2025
- updates to the graduate academic calendar on acceptable formats of thesis and dissertations for graduate programs in Chemistry and Physics & Astronomy (Faculty of Science), effective FW'25

## Referrals

A recommendation for Senate to endorse the *President's Policy on the Temporary Suspension of Program Admissions* was referred back to APPRC for further consideration taking into account Senate's feedback, and with a request that the policy subsequently be brought forward to Senate with its referenced associated procedures, the latter for Senate to comment on.

## Committee Information Items

### Executive Committee

Information items included the following:

- a review of the annual Senate and committee survey questionnaires for revision.
- approval of minor revisions to the Faculty Council Rules and Procedures of the Faculty of Health.
- Receipt of and transmission to Senate communications from internal colleagues / bodies addressed to the Chair of Senate concerning administrative decisions on the temporary suspension of admissions to programs.

### Academic Policy, Planning and Research Committee

Information items included the following:

- Concurrence on the recommendation of the Provost to establish the *Jay Smith and Laura Rapp Chair in Innovation and Entrepreneurship* in the Schulich School of Business.
- Monitoring and responding to the impact of US policy on Canadian university research and researchers.
- The status of the Committee's support for the *Faculties of the Future* initiative, noting that community consultations are continuing, and that APPRC supports a Senate discussion of the interim report released on 27 February 2025.

### Academic Standards, Curriculum and Pedagogy Committee

Information items included minor modifications to degree requirements and minor edits in programs housed in the Faculties of AMPD, EUC, Education, FGS, Health, LA&PS, and Science, effective FW'25.

# **The Senate of York University Synopsis**

## **Additional Information about this Meeting**

Please refer to the full Senate agenda of [27 March 2025](#) for details about the items reported.

The next regular meeting of Senate will be held at **3:00 pm on Thursday, 24 April 2025.**

## Schulich School of Business Memorandum

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To: Faculty Council, Schulich School of Business

From: Mike Valente, MBA Program Director

Date: March 10<sup>th</sup>, 2025

Re: MBA Program Modifications

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**Motion: The MBA Program is seeking approval for 5 changes to the MBA Program (4 of which require approval and 1 of which is for information purposes only)**

- 1) Online Delivery (for approval): That faculty council approve the following limits on MBA student enrollment in online (ONLN) courses
  - a. Full time students are permitted to enroll in no more than 6 credits of online (ONLN) courses per term of study
  - b. Part time students are permitted to enroll in no more than 3 credits of online (ONLN) courses per term of study
- 2) MBA Core Course Resequencing (for information): That faculty council approve moving MKTG 5200 3.00 Marketing Management from Term 2 to Term 1 of the full-time MBA program
- 3) ORGS 5100 3.00 Organizational Behaviour and SGMT 6000 3.00 Strategic Management (for approval): That faculty council approve the following changes to the Organizational Behaviour and Strategic Management course in the MBA Program
  - a. Remove SGMT 6000 3.00 Strategic Management from the MBA program.
  - b. Remove ORGS 5100 3.00 Organizational Behaviour from the MBA program
  - c. Add SGMT 5200 3.00 Strategy as a new Term 2 course in the MBA program<sup>1</sup>
  - d. Add ORGS 5200 3.00 Leading People and Organizations as a new Term 2 course in the MBA program
- 4) Prerequisites for Backbone Courses (for approval): That faculty council approve a prerequisite of a minimum of 15 5000-level foundational course credits for the following MBA core courses
  - a. SGMT 5200 3.00 Strategy (pending approval of new course proposal)
  - b. ORGS 5200 3.00 Leading People and Organizations
  - c. SUST 5200 3.00 Business and Sustainability
  - d.

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<sup>1</sup> Approval and implementation of these motions are contingent on the approval of the New Course Proposal of SGMT 5200 at the May 1<sup>st</sup> Master's Program Committee and June 6<sup>th</sup> Schulich Faculty Council.

- 5) Accelerated Program (for approval): That faculty council approve the following changes to the program requirements for the Accelerated MBA Program
  - a. The removal of SGMT 6000 3.00 Strategic Management as a required course for the accelerated program
  - b. The change to the core/elective course ratio from 9.00/21.00 credits to 6.00/24.00 (see Appendix C).

**Rationale:**

Online Course Limits: The MBA program is in the process of adding the ONLN delivery mode to all core courses as part of the MBA Program's efforts to increase flexibility in the delivery mode through which students can pursue a Schulich MBA. That said, to balance flexibility in delivery mode with an enriching interpersonal program experience, we aim to put a limit on the number of online courses students can take each term.

MBA Core Course Resequencing: The decline in MBA enrollment in business education and the growth of specialized master's programs has precipitated the need to reflect on the key value proposition of the MBA. At its core, the MBA program is not a specialist program, it provides students with general management skills to manage and lead people and organizations. This minor program change seeks to better reflect a distinction between foundational competencies in functional disciplines and organization level competencies. Both are essential and are distinguished in learning outcomes #1 and #2 of the program listed below:

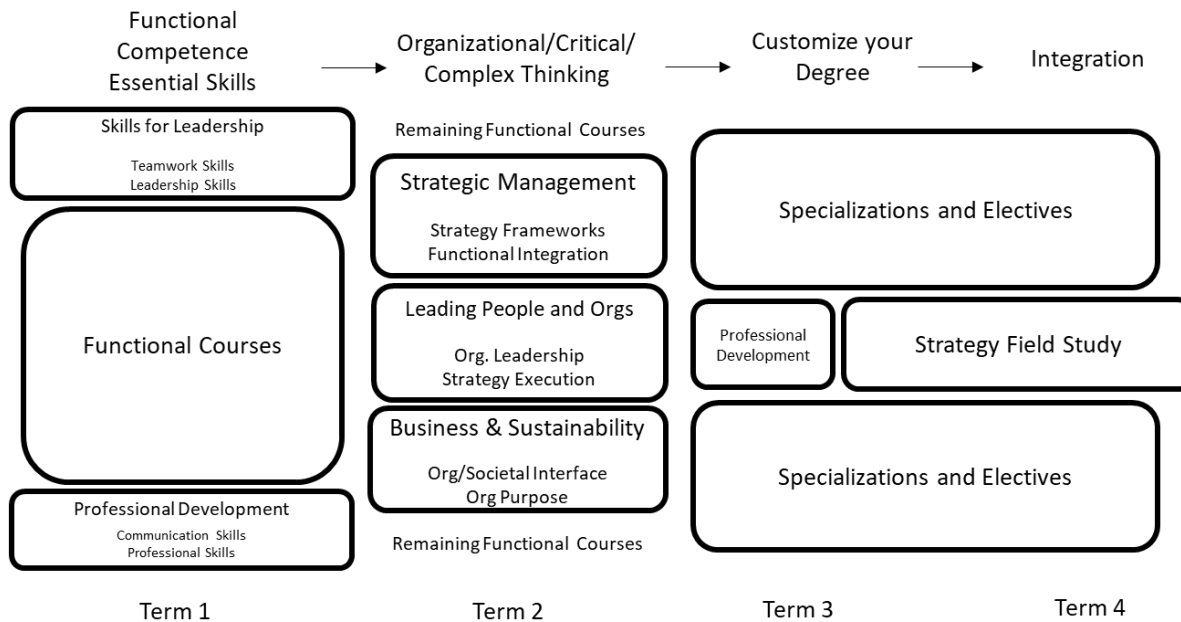
*Program Learning Outcome #1: Core Business Knowledge and Understanding: Demonstrate fundamental knowledge in the functional disciplines of management*

*Program Learning Outcome #2: Critical Analysis and Decision-Making: Make complex and strategic organization level decisions that create sustainable value*

To best delivery on Program Learning Outcome #2, the MBA program seeks to offer the following three courses concurrently and after a majority of functions-based courses have been completed:

- 1) SGMT 5200 3.00 Strategy
- 2) ORGS 5100 3.00 Leading People and Organizations (formerly Organizational Behaviour)
- 3) SUST 5200 3.00 Business and Sustainability

## Proposed Schulich MBA Curriculum



We propose that Strategy (formerly Strategic Management), an essential part in any MBA program, be taken with Leading People and Organizations (formerly Organizational Behaviour) and Business and Sustainability as reflected in the diagram above:

There are at least three reasons for this:

1. An MBA graduate should be as competent in the strategy process as they are in organizational acumen. The latter speaks to understanding how and why an organization functions in the way that it does and how and why individual behaviour, team behaviour, structures, governance practices, culture, systems, and processes explain organizational performance. The current position of Leading People and Organizations (formerly Organizational Behaviour) as a 1<sup>st</sup> term functional course, one year prior to Strategy, is less effective in building general management competence than if students took these concurrently.
2. Business Sustainability (SUST 5200) has emerged as a key point of distinction for Schulich and will remain so going forward. Because the Schulich MBA program views sustainability, not as a function within an organization, but as a central part to an organization's existence, the course needs to be alongside Strategy and Leading People and Organizations. A key part of the learning outcomes of SUST 5200 is to understand the tension between business models and society and to find areas of alignment between business strategy/organizational behaviour and societal interests. This is also a key program learning outcome. Decoupling this course from Strategy and Leading People and Organizations by placing it in a separate

term limits student learning of the integration of organizations and their environments, particularly the interrelationship between strategy and societal interests and the key organizational competence necessary to achieve sustainable value.

3. Having Strategy in Terms 3 and 4 (i.e. year 2) makes it very difficult to diversify our market strategy. For instance, our WEMBA (Weekend/Evening) program is an instrumental initiative to attract domestic and traditionally part-time students working full time, something that has grown in importance given the current constraints on international student enrollment. The WEMBA program's curriculum currently breaches the SGMT 6000 prerequisite of 5000 level courses because the nature of the program requires that all core courses, including strategy, be taken within the first year. Requiring that strategy be taken after all 5000 level courses makes it difficult to offer a condensed accelerated program to Schulich specialized master's graduates – a potentially lucrative market strategy for the program – because a key component that attracts these students is that they could finish the program in a condensed time period.

SGMT 6000 3.00 Strategic Management: SGMT 6000 will be replaced by SGMT 5200. The Strategy area has determined that if the strategy course is to take place in the 1st year of the program, it requires a new course that departs in title and content from the existing SGMT 6000 course.

ORGS 5100 3.00 Organizational Behaviour: ORGS 5100 will be replaced by ORGS 5200. ORGS 5100 is currently offered to both the MBA and Master of Management programs. The MBA redesign in this proposal positions this course in a way that is inconsistent with how it is used in the Master of Management program. Hence, it is best to separate these courses so that the current course (ORGS 5100 Organizational Behaviour) remains with the Master of Management and the new course (ORGS 5200 Leading People and Organizations) becomes part of the MBA curriculum.

Prerequisites: because our goal is to elevate students to organization level competencies **after** they have learned foundations associated with most functional disciplines, we aim to insert prerequisites for the above stated courses (ORGS 5100, SUST 5200; and SGMT 5200) reflecting this requirement.

Accelerated Program: With the removal of SGMT 6000 from the MBA program, we also remove it as a required course for students in the Accelerated program. As a result, the core/elective ratio changes from 9/21 for accelerated students to 6/24. We have chosen not to replace SGMT 6000 with the replacement SGMT 5200 course as a requirement for accelerated students. Requiring that accelerated students take the new strategy course implies that they should also take ORGS 5100 and SUST 5200 for the reasons specified above. At this time, the program is not willing to make this change to the accelerated program. As a result, if a student has taken a strategy course in their previous degree (e.g. Schulich BBA students), they will be exempt from taking this course. That said, Masters of Management graduates or any other accelerated students who have not taken an equivalent strategy course in their past degree will be required to take this new course.

# Minor Modification to Program/ Diploma/Certificate Academic Requirements Proposal Form

## Schulich School of Business

**Program:** Masters of Business Administration, Schulich School of Business

**Degree Designation** MBA

**Type of Modification:** Curricular changes.

**Location:** Keele

**Effective Date:** Fall 2025

**Approval Date at Faculty Council:**

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### 1. The MBA program is seeking approval for 4 motions

1. Online Delivery: That faculty council approve the following limits on MBA student enrollment in online (ONLN) courses
  - a. Full time students are permitted to enroll in no more than 6 credits of online (ONLN) courses per term of study
  - b. Part time students are permitted to enroll in no more than 3 credits of online (ONLN) courses per term of study
2. ORGS 5100 3.00 Organizational Behaviour and SGMT 6000 3.00 Strategic Management: That faculty council approve the following changes to the Organizational Behaviour and Strategic Management course in the MBA Program
  - a. Remove SGMT 6000 3.00 Strategic Management from the MBA program.
  - b. Remove ORGS 5100 3.00 Organizational Behaviour from the MBA program.
  - c. Add SGMT 5200 3.00 Strategy as a new Term 2 course in the MBA program<sup>1</sup>
  - d. Add ORGS 5200 3.00 Leading People and Organizations as a new Term 2 course in the MBA program
3. Prerequisites for Backbone Courses: That faculty council approve a prerequisite of a minimum of 15 5000-level foundational course credits for the following MBA core courses
  - a. SGMT 5200 3.00 Strategy (pending approval of new course proposal)

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<sup>1</sup> Approval and implementation of these motions are contingent on the approval of the New Course Proposal of SGMT 5200 at the May 1<sup>st</sup> Master's Program Committee and June 6<sup>th</sup> Schulich Faculty Council.

- b. ORGS 5200 3.00 Leading People and Organizations
  - c. SUST 5200 3.00 Business and Sustainability
4. Accelerated Program: That faculty council approve the following changes to the program requirements for the Accelerated MBA Program
- a. The removal of SGMT 6000 3.00 Strategic Management as a required course for the accelerated program
  - b. The change to the core/elective course ratio from 9.00/21.00 credits to 6.00/24.00 (see Appendix C).

## **2. For Master's Program Committee Information**

In addition to the above motions, the following represent additional changes to the MBA program that do not require governance approval yet represent material changes:

MBA Core Course Resequencing: That faculty council approve moving MKTG 5200 3.00 Marketing Management from Term 2 to Term 1 of the full-time MBA program.

### **3. Provide a rationale for the proposed modifications.**

Online Course Limits: The MBA program is in the process of adding the ONLN delivery mode to all core courses as part of the MBA Program's efforts to increase flexibility in the delivery mode through which students can pursue a Schulich MBA. That said, to balance flexibility in delivery mode with an enriching interpersonal program experience, we aim to put a limit on the number of online courses students can take each term.

MBA Core Course Resequencing: The decline in MBA enrollment in business education and the growth of specialized master's programs has precipitated the need to reflect on the key value proposition of the MBA. At its core, the MBA program is not a specialist program, it provides students with general management skills to manage and lead people and organizations. This minor program change seeks to better reflect a distinction between foundational competencies in functional disciplines and organization level competencies. Both are essential and are distinguished in learning outcomes #1 and #2 of the program listed below:

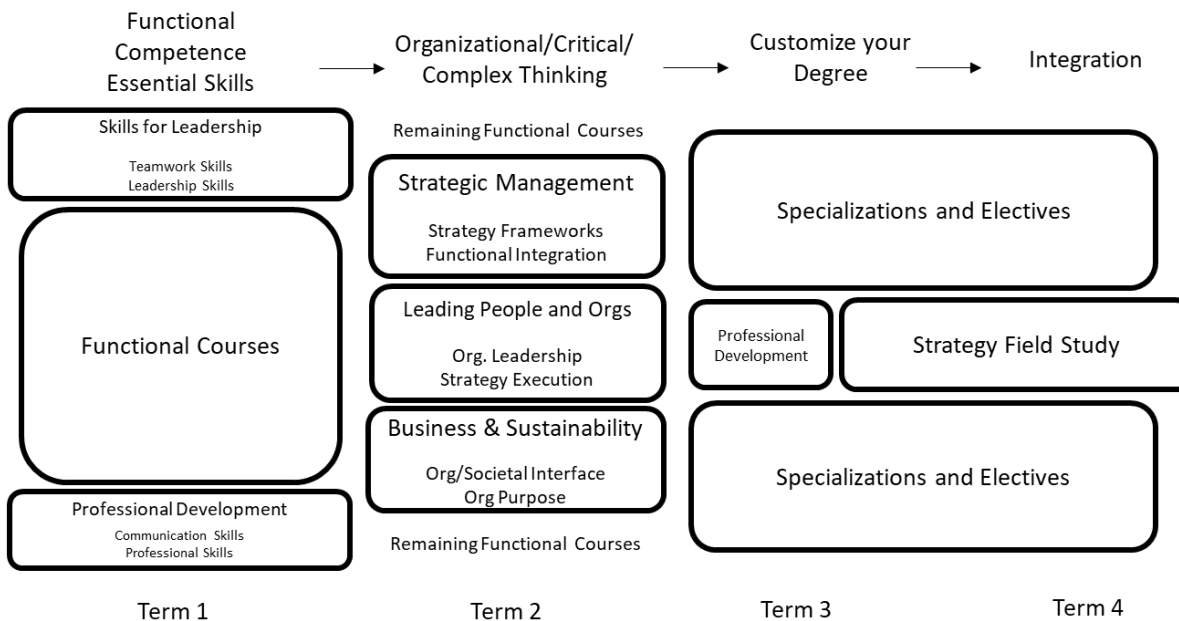
*Program Learning Outcome #1: Core Business Knowledge and Understanding: Demonstrate fundamental knowledge in the functional disciplines of management*

*Program Learning Outcome #2: Critical Analysis and Decision-Making: Make complex and strategic organization level decisions that create sustainable value*

To best delivery on Program Learning Outcome #2, the MBA program seeks to offer the following three courses concurrently and after a majority of functions-based courses have been completed:

- 1) SGMT 5200 3.00 Strategy
- 2) ORGS 5200 3.00 Leading People and Organizations (formerly Organizational Behaviour)
- 3) SUST 5200 3.00 Business and Sustainability

## Proposed Schulich MBA Curriculum



We propose that Strategy (formerly Strategic Management), an essential part in any MBA program, be taken with Leading People and Organizations (formerly Organizational Behaviour) and Business and Sustainability as reflected in the diagram above:

There are at least three reasons for this:

1. An MBA graduate should be as competent in the strategy process as they are in organizational acumen. The latter speaks to understanding how and why an organization functions in the way that it does and how and why individual behaviour, team behaviour, structures, governance practices, culture, systems, and processes explain organizational performance. The current position of Leading People and Organizations (formerly Organizational Behaviour) as a 1<sup>st</sup> term functional course, one year prior to strategy, is less effective in building general management competence than if students took these concurrently.
2. Business Sustainability (SUST 5200) has emerged as a key point of distinction for Schulich and will remain so going forward. Because the Schulich MBA program views sustainability, not as a function within an organization, but as a central part to an organization's existence,

the course needs to be alongside Strategy and Leading People and Organizations. A key part of the learning outcomes of SUST 5200 is to understand the tension between business models and society and to find areas of alignment between business strategy/organizational behaviour and societal interests. This is also a key program learning outcome. Decoupling this course from Strategy and Leading People and Organizations by placing it in a separate term limits student learning of the integration of organizations and their environments, particularly the interrelationship between strategy and societal interests and the key organizational competence necessary to achieve sustainable value.

3. Having Strategy in Terms 3 and 4 (i.e. year 2) makes it very difficult to diversify our market strategy. For instance, our WEMBA (Weekend/Evening) program is an instrumental initiative to attract domestic and traditionally part-time students working full time, something that has grown in importance given the current constraints on international student enrollment. The WEMBA program's curriculum currently breaches the SGMT 6000 prerequisite of 5000 level courses because the nature of the program requires that all core courses, including Strategy, be taken within the first year. Requiring that Strategy be taken after all 5000 level courses makes it difficult to offer a condensed accelerated program to Schulich specialized master's graduates – a potentially lucrative market strategy for the program – because a key component that attracts these students is that they could finish the program in a condensed time period.

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ORGS 5100 3.00 Organizational Behaviour: ORGS 5100 will be replaced by ORGS 5200: ORGS 5100 is currently offered to both MBA and Master of Management students. The MBA redesign in this proposal positions this course in a way that is inconsistent with how it is used in the Master of Management program. Hence, it is best to separate these courses so that the current course (ORGS 5100 Organizational Behaviour) remains with the Master of Management and the new course (ORGS 5200 Leading People and Organizations) becomes part of the MBA curriculum.

Prerequisites: Because our goal is to elevate students to organization level competencies after they have learned foundations associated with most functional disciplines, we aim to insert prerequisites for the above stated courses (ORGS 5100, SUST 5200; and SGMT 5200) reflecting this requirement.

Accelerated Program: With the removal of SGMT 6000 from the MBA program, we also remove it as a required course for students in the Accelerated program. As a result, the core/elective ratio changes from 9/21 for accelerated students to 6/24. We have chosen not to replace SGMT 6000 with the replacement SGMT 5200 course as a requirement for accelerated students. Requiring that accelerated students take the new strategy course implies that they should also take ORGS 5100 and SUST 5200 for the reasons specified above. At this time, the program is not willing to make this change to the accelerated program. As a result, if a student has taken a strategy course in their

previous degree (e.g. Schulich BBA students), they will be exempt from taking this course. That said, Masters of Management graduates or any other accelerated students who have not taken an equivalent strategy course in their past degree will be required to take this new course.

4. How will the proposed modification support the achievement of Program Learning Outcomes?

Revised MBA Program Learning Outcomes were approved by MPC and Faculty Council in January 2025. The above motions are meant to align directly with these learning outcomes for the reasons already specified. In particular, the learning outcomes distinguish between foundational level competencies in the key functions of business (e.g. finance, marketing, etc.) and organization level competencies found in courses of strategy, leading people and organizations (formerly organizational behaviour) and business sustainability. The above changes also reflect sustainability as a distinct learning outcome of the MBA program, which further justifies a more central role of this course. Because of this, our goal is to amend the curriculum so that Term 1 of the full time program emphasize functional competencies and basic skill development (Learning Outcome #1) while Term 2 of the Full Time Program emphasizes those learning outcomes associated with organization level thinking, strategy, and sustainability.

5. Describe how students currently enrolled in the program will be accommodated.

Full time students currently enrolled in the program will complete SGMT 6000 as originally scheduled, meaning that this course will be available for one last time in the 25/26 academic year. Students beginning the program this coming September and January will take SGMT 5200 in Term 2 of their program. Existing part time students (including accelerated) will have the option of taking either SGMT 6000 or SGMT 5200 for the coming academic year but will only take SGMT 5200 beginning in the 26/27 academic year.

6. Describe any resource implications and how they are being addressed (e.g., through a reallocation of existing resources). If new/additional resources are required, provide a statement from the relevant Dean(s)/Principal confirming resources will be in place to implement the changes.

The online course limits and new prerequisites do not have any resource implications. The resequencing of the MBA core courses will not result in any significant resource implications. However, because we will offer two versions of the Strategy course for this coming year (SGMT 5200 and SGMT 6000), the strategy department will need more faculty than usual to teach their courses. The department is aware of this one-year anomaly and will staff accordingly.

7. If relevant, summarize the consultation undertaken with relevant academic units, including commentary on the impact of the proposed changes on other programs. Provide individual statements from the relevant program(s) confirming consultation and their support.

This minor program change is a culmination of 18 months of consultations with Schulich stakeholders, including employers, alumni, students, internal management, faculty and staff. The above and recently approved learning outcomes, which more explicitly denote the distinction between functional-based courses and organization-based courses and the role of sustainability is based on many years of consultations with the wider Schulich community. Moreover, a formal presentation of the above was presented to Schulich’s Master’s Program Committee in February of 2025 to solicit feedback and comments that were then incorporated into this current set of proposals.

## APPENDIX

- Appendix A: Full-Time MBA Curriculum Chart
- Appendix B: Part-Time MBA Curriculum Chart
- Appendix C: Accelerated MBA Curriculum Chart
- Appendix D: JD/MBA and MFA/MBA Curriculum Charts

### Attach a Side-by-Side Academic Calendar Copy Comparison

Ensure that deletions are indicated with strikethrough (e.g., ~~strikethrough~~) text and additions are made in a contrasting colour (e.g., **MGMT 1000**)

Existing Program/ Diploma/Certificate Information (Change From):	Proposed Program/ Diploma/Certificate Information (Change To):
<div>Title</div> <div>Current text</div> <div>See Attached Curriculum Charts</div>	<div>Title</div> <div>Current and new text</div> <div>See Attached Curriculum Charts</div>

## Appendix A

# MBA at a Glance

## FULL-TIME (KEELE CAMPUS)

### PROGRAM DETAILS:

- Program Length: 16-20 months
- Location: Keele campus (some courses offered downtown)
- Normal full-time course load: 9.00-15.00 credits per term
- Maximum course load: 18.00 credits
- Admission: September or January
  - for September admission, continuous enrolment in Fall-Winter terms is recommended
  - for January admission, continuous enrolment in Winter-Summer terms is recommended

### GRADUATION REQUIREMENTS:

- Overall grade point average (GPA) of at least 4.40 (B-).
- Successful completion of 60.00 credits of courses consisting of:
  - 33.00 credits** of core courses
  - 27.00 credits** of electives

MBA 1		
Term 1	MGMT 6150 3.00 SKILLS FOR LEADERSHIP	
	ACTG 5100 3.00 FINANCIAL ACCOUNTING FOR MANAGERS	
	ECON 5100 3.00 THE ECONOMIC ENVIRONMENT OF BUSINESS	
	<del>ORGS 5100 3.00</del> <del>ORGANIZATIONAL BEHAVIOUR</del>	
	OMIS 5110 1.50 INFORMATION SYSTEMS	OMIS 5120 1.50 QUANTITATIVE METHODS
Term 2	SUST 5200 3.00 BUSINESS AND SUSTAINABILITY	
	FINE 5200 3.00 MANAGERIAL FINANCE	
	<del>MKTG 5200 3.00</del> <del>MARKETING MANAGEMENT</del>	
	ACTG 5210 1.50 MANAGEMENT ACCOUNTING	OMIS 5210 1.50 OPERATIONS MANAGEMENT
	ELECTIVE(S) AND SPECIALIZATION OPPORTUNITIES* (3.00 CREDITS)	
MBA 2		
Term 3 and 4	<del>SGMT 6000 3.00</del> STRATEGIC MANAGEMENT	
	MGMT 6090 0.00** STRATEGY FIELD STUDY FORMATION	
	MGMT 6100 3.00 *** STRATEGY FIELD STUDY (TWO TERMS)	
	ELECTIVES AND SPECIALIZATION OPPORTUNITIES* (24.00 CREDITS)	

# MBA at a Glance

## FULL-TIME (KEELE CAMPUS)

### PROGRAM DETAILS:

- Program Length: 16-20 months
- Location: Keele campus (some courses offered downtown)
- Normal full-time course load: 9.00-15.00 credits per term
- Maximum course load: 18.00 credits
- Admission: September or January
  - for September admission, continuous enrolment in Fall-Winter terms is recommended
  - for January admission, continuous enrolment in Winter-Summer terms is recommended

### GRADUATION REQUIREMENTS:

- Overall grade point average (GPA) of at least 4.40 (B-).
- Successful completion of 60.00 credits of courses consisting of:
  - 33.00 credits** of core courses
  - 27.00 credits** of electives

MBA 1		
Term 1	MGMT 6150 3.00 SKILLS FOR LEADERSHIP	
	ACTG 5100 3.00 FINANCIAL ACCOUNTING FOR MANAGERS	
	ECON 5100 3.00 THE ECONOMIC ENVIRONMENT OF BUSINESS	
	MKTG 5200 3.00 MARKETING MANAGEMENT	
	OMIS 5110 1.50 INFORMATION SYSTEMS	OMIS 5120 1.50 QUANTITATIVE METHODS
Term 2	SUST 5200 3.00 BUSINESS AND SUSTAINABILITY	
	FINE 5200 3.00 MANAGERIAL FINANCE	
	ORGS 5200 3.00 LEADING PEOPLE AND ORGANIZATIONS	
	ACTG 5210 1.50 MANAGEMENT ACCOUNTING	OMIS 5210 1.50 OPERATIONS MANAGEMENT
	SGMT 5200 3.00 STRATEGY	
MBA 2		
Term 3 & 4	MGMT 6090 0.00** STRATEGY FIELD STUDY FORMATION	
	MGMT 6100 3.00 *** STRATEGY FIELD STUDY (TWO TERMS)	
	ELECTIVES AND SPECIALIZATION OPPORTUNITIES* (27.00 CREDITS)	

## Appendix B

# MBA at a Glance

## PART-TIME (KEELE CAMPUS)

### PROGRAM DETAILS:

- Program Length: 36-40 months
- Location: Keele campus
- Normal part-time course load: 6.00 credits per term
- Maximum course load: 7.50 credits
- Admission: September (Keele & Nadal); January (Keele only)
  - for September admission, continuous enrolment in Fall-Winter terms is recommended
  - for January admission, continuous enrolment in Winter-Summer terms is recommended




### GRADUATION REQUIREMENTS:

- Overall grade point average (GPA) of at least 4.40 (B-).
- Successful completion of 60.00 credits of courses consisting of:

**33.00 credits** of core courses

**27.00 credits** of electives

MBA 1	
Term 1	MGMT 6150 3.00 SKILLS FOR LEADERSHIP
	ACTG 5100 3.00 FINANCIAL ACCOUNTING FOR MANAGERS
Term 2	<del>ECON 5100 3.00</del> <del>THE ECONOMIC ENVIRONMENT OF BUSINESS</del>
	OMIS 5110 1.50 INFORMATION SYSTEMS
Term 3	<del>OMIS 5120 1.50</del> <del>QUANTITATIVE METHODS</del>
	<del>ORGS 5100 3.00</del> <del>ORGANIZATIONAL BEHAVIOUR</del>
Term 4	<del>SUST 5200 3.00</del> <del>BUSINESS AND SUSTAINABILITY</del>
	<del>ACTG 5210 1.50</del> <del>MANAGEMENT ACCOUNTING</del>
Term 5	<del>OMIS 5210 1.50</del> <del>OPERATIONS MANAGEMENT</del>
	<del>MKTG 5200 3.00</del> <del>MARKETING MANAGEMENT</del>
Term 5	<del>FINE 5200 3.00</del> <del>MANAGERIAL FINANCE</del>
	ELECTIVE(S) AND SPECIALIZATION OPPORTUNITIES* (3.00 CREDITS)
MBA 2	
	<del>SGMT 6000 3.00</del> <del>STRATEGIC MANAGEMENT</del>
	MGMT 6090 0.00** STRATEGY FIELD STUDY FORMATION
	MGMT 6100 3.00*** STRATEGY FIELD STUDY (TWO TERMS)
	ELECTIVES AND SPECIALIZATION OPPORTUNITIES* (24.00 CREDITS)

-  Core Foundation Courses
-  Electives
-  Strategy Field Study

\*Electives must not duplicate previous business courses taken.

\*\* Students must enrol in MGMT 6090 0.00 in the first term of their Strategy Field Study.

\*\*\* The Strategy Field Study spans two consecutive terms. Students may enrol in MGMT 6100 3.00 in either the first or second term of their Strategy Field Study.

# MBA at a Glance

## PART-TIME (KEELE CAMPUS)

### PROGRAM DETAILS:

- Program Length: 36-40 months
- Location: Keele campus
- Normal part-time course load: 6.00 credits per term
- Maximum course load: 7.50 credits
- Admission: September (Keele & Nadal); January (Keele only)
  - for September admission, continuous enrolment in Fall-Winter terms is recommended
  - for January admission, continuous enrolment in Winter-Summer terms is recommended

### GRADUATION REQUIREMENTS:

- Overall grade point average (GPA) of at least 4.40 (B-).
- Successful completion of 60.00 credits of courses consisting of:

33.00 credits of core courses

27.00 credits of electives

MBA 1	
Term 1	MGMT 6150 3.00 SKILLS FOR LEADERSHIP
	ACTG 5100 3.00 FINANCIAL ACCOUNTING FOR MANAGERS
Term 2 & 3	MKTG 5200 3.00 MARKETING MANAGEMENT
	OMIS 5110 1.50 INFORMATION SYSTEMS
	OMIS 5120 1.50 QUANTITATIVE METHODS
	ECON 5100 3.00 THE ECONOMIC ENVIRONMENT OF BUSINESS
Terms 4 & 5	ACTG 5210 1.50 MANAGEMENT ACCOUNTING
	OMIS 5210 1.50 OPERATIONS MANAGEMENT
	FINE 5200 3.00 MANAGERIAL FINANCE
	SUST 5200 3.00 BUSINESS AND SUSTAINABILITY
	ORGS 5200 3.00 LEADING PEOPLE AND ORGANIZATIONS
	SGMT 5200 3.00 STRATEGY
MBA 2	
	MGMT 6090 0.00** STRATEGY FIELD STUDY FORMATION
	MGMT 6100 3.00*** STRATEGY FIELD STUDY (TWO TERMS)
	ELECTIVES AND SPECIALIZATION OPPORTUNITIES* (27.00 CREDITS)

- ☐ Core Foundation Courses Electives
- ☐ Strategy Field Study
- ☐

## Appendix C

# MBA at a Glance

ACCELERATED (KEELE CAMPUS)

### PROGRAM DETAILS:

- **Program length:** 8-20 months
- **Location:** MBA 1 and MBA 2 courses at Keele Campus
- **Admission:** September or January

### GRADUATION REQUIREMENTS:

- Overall grade point average (GPA) of at least 4.40 (B-).
- Successful completion of 30.00 credits of courses consisting of:  
~~9.00 credits of core courses (MGMT 6150 3.00, SGMT 6000 3.00, MGMT 6090 0.00 and MGMT 6100 3.00)~~  
 21.00 credits of electives

#### FULL-TIME ACCELERATED

MBA 2	
Term 1	MGMT 6150 3.00 SKILLS FOR LEADERSHIP
	<del>SGMT 6000 3.00</del> STRATEGIC MANAGEMENT
	MGMT 6090 0.00 STRATEGIC FIELD STUDY FORMATION
	ELECTIVES (9.00 CREDITS)*
Term 2	MGMT 6100 3.00*** STRATEGY FIELD STUDY
	ELECTIVES (12.00 CREDITS)*

#### PART-TIME ACCELERATED

MBA 2	
Term 1	MGMT 6150 3.00 SKILLS FOR LEADERSHIP
	ELECTIVE (3.00 CREDITS)*
Term 2	ELECTIVES (6.00 CREDITS)*
Term 3	MGMT 6090 0.00** STRATEGY FIELD STUDY FORMATION
	<del>SGMT 6000 3.00</del> STRATEGIC MANAGEMENT
	ELECTIVE (3.00 CREDITS)*
Term 4	MGMT 6100 3.00*** STRATEGY FIELD STUDY
	ELECTIVE (3.00 CREDITS)*
Term 5	ELECTIVES (6.00 CREDITS)*

- ☐ Core Foundation Courses Electives
- ☐ Strategy Field Study
- ☐

# MBA at a Glance

ACCELERATED (KEELE CAMPUS)

## PROGRAM DETAILS:

- Program length: 8-20 months
- Location: MBA 1 and MBA 2 courses at Keele Campus
- Admission: September or January

## GRADUATION REQUIREMENTS:




- Overall grade point average (GPA) of at least 4.40 (B-).
- Successful completion of 30.00 credits of courses consisting of:  
6.00 credits of core courses (MGMT 6150 3.00, MGMT 6090 0.00 and MGMT 6100 3.00)  
24.00 credits of electives

### FULL-TIME ACCELERATED

MBA 2	
Term 1	MGMT 6150 3.00 SKILLS FOR LEADERSHIP
	MGMT 6090 0.00 STRATEGIC FIELD STUDY FORMATION
	ELECTIVES (12.00 CREDITS)*
Term 2	MGMT 6100 3.00*** STRATEGY FIELD STUDY
	ELECTIVES (12.00 CREDITS)*

### PART-TIME ACCELERATED

MBA 2	
Term 1	MGMT 6150 3.00 SKILLS FOR LEADERSHIP
	ELECTIVE (3.00 CREDITS)*
Term 2	ELECTIVES (6.00 CREDITS)*
Term 3	MGMT 6090 0.00** STRATEGY FIELD STUDY FORMATION
	ELECTIVE (6.00 CREDITS)*
Term 4	MGMT 6100 3.00*** STRATEGY FIELD STUDY
	ELECTIVE (3.00 CREDITS)*
Term 5	ELECTIVES (6.00 CREDITS)*

-  Core Foundation Courses Electives
-  Strategy Field Study
- 

# Appendix D

## 4 Year Joint MBA/JD at a Glance

### FULL-TIME STUDY (KEELE CAMPUS)

- Normal full-time load in MBA Year 1 is 15.00 credits per term; must complete 30.00 credits by the end of Term 2
- Normal full-time load in Osgoode Year 1 is 18.00 credits per term; must complete 36 JD credits by the end of Osgoode Year 1
- Osgoode requirement: 13.00 – 17.00 credits per term at both schools in the upper years of the program

### PROGRAM LENGTH

- 2 terms of MBA Year 1 curriculum
- 2 terms of Osgoode Year 1 curriculum
- 4 terms of combined Schulich and Osgoode upper year courses

### GRADUATION REQUIREMENTS

Successful completion of:

- **MGMT 5500 0.00**
- **45.00 credits** of Schulich School of Business courses
- first year program at Osgoode Hall Law School
- **45.00 academic credits** of upper year Osgoode Hall Law School courses, including:
  - (i) successful completion of the Joint MBA/JD Seminar in the final year of the Joint Program;
  - (ii) upper year legal research and writing requirement (Osgoode);
  - (iii) Indigenous and Aboriginal Law Requirement
  - (iv) at least one course or program with an experiential practicum component ("Praxicum")
  - (v) LW 2010 4.00 - Administrative Law
- Successful completion of the 40 hour Osgoode Public Interest Requirement (OPIR)

YEAR 1 OR 2		
Term 1	MGMT 6150 3.00 SKILLS FOR LEADERSHIP	
	ACTG 5100 3.00 FINANCIAL ACCOUNTING FOR MANAGERS	
	ECON 5100 3.00 THE ECONOMIC ENVIRONMENT OF BUSINESS	
	<del>ORGS 5100 3.00</del> ORGANIZATIONAL BEHAVIOUR	
	OMIS 5110 1.50 INFORMATION SYSTEMS	OMIS 5120 1.50 QUANTITATIVE METHODS
	MGMT 5500 0.00 BUSINESS AND THE LAW SEMINAR (COMPULSORY NON-CREDIT TAKEN UPON ENTRY TO PROGRAM)	
Term 2	SUST 5200 3.00 BUSINESS AND SUSTAINABILITY	
	FINE 5200 3.00 MANAGERIAL FINANCE	
	<del>MKTG 5200 3.00</del> MARKETING MANAGEMENT	
	ACTG 5210 1.50 MANAGEMENT ACCOUNTING	OMIS 5210 1.50 OPERATIONS MANAGEMENT
	MGMT 5500 0.00 BUSINESS AND THE LAW SEMINAR (COMPULSORY NON-CREDIT TAKEN UPON ENTRY TO PROGRAM)	
	SCHULICH ELECTIVE(S) (3.00 CREDITS)	

YEAR 1 OR 2	
Term 1	LW 1300 4.00 INTRODUCTORY LAWYERING SKILLS (FULL YEAR COURSE)
	LW 1200 3.00 ETHICAL LAWYERING IN A GLOBAL COMMUNITY (FULL YEAR COURSE)
	LW 1800 6.00 PUBLIC & CONSTITUTIONAL LAW (FULL YEAR COURSE)
	LW 1020 4.00 TORTS
	LW 1040 4.00 CRIMINAL LAW
	LW 1010 4.00 CONTRACTS
	MGMT 5500 0.00 BUSINESS AND THE LAW SEMINAR (COMPULSORY NON-CREDIT TAKEN UPON ENTRY TO PROGRAM)
Term 2	LW 1300 4.00 INTRODUCTORY LAWYERING SKILLS (FULL YEAR COURSE)
	LW 1200 3.00 ETHICAL LAWYERING IN A GLOBAL COMMUNITY (FULL YEAR COURSE)
	LW 1800 6.00 PUBLIC & CONSTITUTIONAL LAW (FULL YEAR COURSE)
	LW 1090 4.00 PROPERTY I
	LW 1302 4.00 LEGAL PROCESS II
	MGMT 5500 0.00 BUSINESS AND THE LAW SEMINAR (COMPULSORY NON-CREDIT TAKEN UPON ENTRY TO PROGRAM)
	FIRST YEAR PERSPECTIVE OPTION (3.00 CREDITS)
YEAR 3 AND 4	
Terms 5-8	<del>MGMT 6000 3.00</del> <del>STRATEGIC MANAGEMENT</del>
	MGMT 6090 0.00 STRATEGY FIELD STUDY FORMATION
	MGMT 6100 3.00 STRATEGY FIELD STUDY (TWO TERMS)
	SCHULICH ELECTIVE(S) (9.00 CREDITS)
	45.00 ACADEMIC CREDITS IN OSGOODE HALL, INCLUDING: LW 3820 3.00 JOINT MBA/JD SEMINAR
	SUCCESSFUL COMPLETION OF THE 40-HOUR OSGOODE PUBLIC INTEREST REQUIREMENT (OPIR)
	SUCCESSFUL COMPLETION OF THE INDIGENOUS & ABORIGINAL LAW REQUIREMENT
	SUCCESSFUL COMPLETION OF THE UPPER YEAR LEGAL RESEARCH & WRITING REQUIREMENT
	SUCCESSFUL COMPLETION OF THE PRAXICUM REQUIREMENT
	LW 2010 4.00 ADMINISTRATIVE LAW

 Core Foundation Courses  Electives

# 4 Year Joint MBA/JD at a Glance

## FULL-TIME STUDY (KEELE CAMPUS)

- Normal full-time load in MBA Year 1 is 15.00 credits per term; must complete 30.00 credits by the end of Term 2
- Normal full-time load in Osgoode Year 1 is 18.00 credits per term; must complete 36 JD credits by the end of Osgoode Year 1
- Osgoode requirement: 13.00 – 17.00 credits per term at both schools in the upper years of the program

## PROGRAM LENGTH

- 2 terms of MBA Year 1 curriculum
- 2 terms of Osgoode Year 1 curriculum
- 4 terms of combined Schulich and Osgoode upper year courses

## GRADUATION REQUIREMENTS

Successful completion of:

- **MGMT 5500 0.00**
- **45.00 credits** of Schulich School of Business courses
- first year program at Osgoode Hall Law School
- **45.00 academic credits** of upper year Osgoode Hall Law School courses, including:
  - (i) successful completion of the Joint MBA/JD Seminar in the final year of the Joint Program;
  - (ii) upper year legal research and writing requirement (Osgoode);
  - (iii) Indigenous and Aboriginal Law Requirement
  - (iv) at least one course or program with an experiential practicum component ("Praxicum")
  - (v) LW 2010 4.00 - Administrative Law
- Successful completion of the 40 hour Osgoode Public Interest Requirement (OPIR)

YEAR 1 OR 2	
Term 1	MGMT 6150 3.00 SKILLS FOR LEADERSHIP
	ACTG 5100 3.00 FINANCIAL ACCOUNTING FOR MANAGERS
	ECON 5100 3.00 THE ECONOMIC ENVIRONMENT OF BUSINESS
	MKTG 5200 3.00 MARKETING MANAGEMENT
	OMIS 5110 1.50 INFORMATION SYSTEMS
	OMIS 5120 1.50 QUANTITATIVE METHODS
Term 2	MGMT 5500 0.00 BUSINESS AND THE LAW SEMINAR (COMPULSORY NON-CREDIT TAKEN UPON ENTRY TO PROGRAM)
	SUST 5200 3.00 BUSINESS AND SUSTAINABILITY
	FINE 5200 3.00 MANAGERIAL FINANCE
	ORGS 5200 3.00 LEADING PEOPLE AND ORGANIZATIONS
	ACTG 5210 1.50 MANAGEMENT ACCOUNTING
	OMIS 5210 1.50 OPERATIONS MANAGEMENT
	MGMT 5500 0.00 BUSINESS AND THE LAW SEMINAR (COMPULSORY NON-CREDIT TAKEN UPON ENTRY TO PROGRAM)
	SGMT 5200 3.00 STRATEGY

YEAR 1 OR 2	
Term 1	LW 1300 4.00 INTRODUCTORY LAWYERING SKILLS (FULL YEAR COURSE)
	LW 1200 3.00 ETHICAL LAWYERING IN A GLOBAL COMMUNITY (FULL YEAR COURSE)
	LW 1800 6.00 PUBLIC & CONSTITUTIONAL LAW (FULL YEAR COURSE)
	LW 1020 4.00 TORTS
	LW 1040 4.00 CRIMINAL LAW
	LW 1010 4.00 CONTRACTS
Term 2	MGMT 5500 0.00 BUSINESS AND THE LAW SEMINAR (COMPULSORY NON-CREDIT TAKEN UPON ENTRY TO PROGRAM)
	LW 1300 4.00 INTRODUCTORY LAWYERING SKILLS (FULL YEAR COURSE)
	LW 1200 3.00 ETHICAL LAWYERING IN A GLOBAL COMMUNITY (FULL YEAR COURSE)
	LW 1800 6.00 PUBLIC & CONSTITUTIONAL LAW (FULL YEAR COURSE)
	LW 1090 4.00 PROPERTY I
	LW 1302 4.00 LEGAL PROCESS II
	MGMT 5500 0.00 BUSINESS AND THE LAW SEMINAR (COMPULSORY NON-CREDIT TAKEN UPON ENTRY TO PROGRAM)
	FIRST YEAR PERSPECTIVE OPTION (3.00 CREDITS)
YEAR 3 AND 4	
Terms 5-8	MGMT 6090 0.00 STRATEGY FIELD STUDY FORMATION
	MGMT 6100 3.00 STRATEGY FIELD STUDY (TWO TERMS)
	SCHULICH ELECTIVE(S) (12.00 CREDITS)
	45.00 ACADEMIC CREDITS IN OSGOODE HALL, INCLUDING: LW 3820 3.00 JOINT MBA/JD SEMINAR
	SUCCESSFUL COMPLETION OF THE 40-HOUR OSGOODE PUBLIC INTEREST REQUIREMENT (OPIR)
	SUCCESSFUL COMPLETION OF THE INDIGENOUS & ABORIGINAL LAW REQUIREMENT
	SUCCESSFUL COMPLETION OF THE UPPER YEAR LEGAL RESEARCH & WRITING REQUIREMENT
	SUCCESSFUL COMPLETION OF THE PRAXICUM REQUIREMENT
	LW 2010 4.00 ADMINISTRATIVE LAW



Core Foundation Courses



Electives

## MBA/MFA/MA ACADEMIC PROGRAM

Students in the combined program may choose either of the following two options. However, most students will find that Option 1 most easily facilitates progress through the combined program within three years of study.

Students should consult with the combined program director or coordinator regularly to ensure they are meeting the requirements as they proceed through the program.

## OPTION 1: GRADUATE STUDIES START

### YEAR 1

#### MFA/MA CORE REQUIREMENTS

Students take the core course requirements for their MFA or MA degree. In addition, students will take GS/ARTM 6301 3.00 ~~Issues in Arts and Cultural Management~~ during the winter semester of their first year of study. (They may also take ARTM 6300 3.00 Cultural Policy in the fall semester of their first year.)

### YEAR 2

#### MBA 1 REQUIREMENTS

Students will take ~~27.00~~ credit hours of the Required MBA Foundations of Management 5000 level Core Courses ~~and MGMT 6150 3.00 in the second year of study and one 3.00 credit Schulich elective.~~ They may also take a course in their Fine Arts field for degree requirement in the MFA or MA. To be eligible to advance to the next year of the joint program, students require a GPA of 5.00 (B), in their first year of study at Schulich.

### YEAR 2 SUMMER

(optional)

Students generally undertake an internship after completing their second year in the program (and having fulfilled all their 5000 level ~~and MGMT 6150 3.00~~ core MBA requirements.)

### YEAR 3

#### MFA/MA and MBA REQUIREMENTS

Students will complete the requirements in both programs during this final year of study. Students should take ~~Strategic Management 6000 3.00 and~~ their Strategic Field Study (MGMT 6090 0.00 and MGMT 6100 3.00) in the fall semester.

Students will also complete their Master's Research Paper (MRP) or Thesis and the balance of their course requirements in each program over the two semesters.

## JOINT MBA/MFA AND MBA/MA AT-A-GLANCE

### OPTION 1 (Recommended)

YEAR 1		
	The required courses in the student’s fine arts specialization in either the MFA or MA streams in the School of Arts, Media, Performance and Design	
	ARTM 6301 3.00 TRANSFORMATION IN MEDIA AND CULTURE	
YEAR 2		
FALL	MGMT 6150 3.00 SKILLS FOR LEADERSHIP	
	OMIS 5110 1.50 INFORMATION SYSTEMS	OMIS 5120 1.50 QUANTITATIVE METHODS
	ECON 5100 3.00 THE ECONOMIC ENVIRONMENT OF BUSINESS	
	<del>ORGS 5100 3.00</del> <del>ORGANIZATIONAL BEHAVIOUR</del>	
	ACTG 5100 3.00 FINANCIAL ACCOUNTING FOR MANAGERS	
WINTER	SUST 5200 3.00 BUSINESS AND SUSTAINABILITY	
	ACTG 5210 1.50 MANAGEMENT ACCOUNTING	OMIS 5210 1.50 OPERATIONS MANAGEMENT
	<del>MKTG 5200 3.00</del> <del>MARKETING MANAGEMENT</del>	
	FINE 5200 3.00 MANAGERIAL FINANCE	
	<del>SCHULICH ELECTIVE</del> <del>(3.00 CREDITS)</del>	
SUMMER	Students generally undertake an internship after completing their second year in the program (and having fulfilled all their 5000 level and MGMT 6150 3.00 core MBA requirements) *Optional	
YEAR 3		
	The balance of required courses in the student’s fine arts specialization in either the MFA or MA streams in the School of Arts, Media, Performance and Design	
	MGMT 6090 0.00 STRATEGY FIELD STUDY FORMATION	
	MGMT 6100 3.00 STRATEGY FIELD STUDY	
	<del>SGMT 6000 3.00</del> <del>STRATEGIC MANAGEMENT</del>	
	SCHULICH ELECTIVE(S) <del>(6.00-9.00 CREDITS)</del>	



**FIND MBA/MFA/MA PROGRAM  
DETAILS ONLINE!**

[schulich.yorku.ca/programs/mba-mfa-ma](http://schulich.yorku.ca/programs/mba-mfa-ma)



Electives



Core

Foundation Courses

## MBA/MFA/MA ACADEMIC PROGRAM

Students in the combined program may choose either of the following two options. However, most students will find that Option 1 most easily facilitates progress through the combined program within three years of study.

Students should consult with the combined program director or coordinator regularly to ensure they are meeting the requirements as they proceed through the program.

### OPTION 1: GRADUATE STUDIES START

#### YEAR 1

##### MFA/MA CORE REQUIREMENTS

Students take the core course requirements for their MFA or MA degree. In addition, students will take GS/ARTM 6301 3.00 **Transformation and Creativity in Media, Entertainment & Culture** during the winter semester of their first year of study. (They may also take ARTM 6300 3.00 Cultural Policy in the fall semester of their first year.)

#### YEAR 2

##### MBA 1 REQUIREMENTS

Students will take **30.00** credit hours of the Required MBA Foundations of Management 5000 level Core Courses. To be eligible to advance to the next year of the joint program, students require a GPA of 5.00 (B), in their first year of study at Schulich.

#### YEAR 2 SUMMER

(optional)

Students generally undertake an internship after completing their second year in the program (and having fulfilled all their 5000 level core MBA requirements.)

#### YEAR 3

##### MFA/MA and MBA REQUIREMENTS

Students will complete the requirements in both programs during this final year of study. Students should take their Strategic Field Study (MGMT 6090 0.00 and MGMT 6100 3.00) in the fall semester.

Students will also complete their Master's Research Paper (MRP) or Thesis and the balance of their course requirements in each program over the two semesters.

## JOINT MBA/MFA AND MBA/MA AT-A-GLANCE

### OPTION 1 (Recommended)

YEAR 1		
	The required courses in the student’s fine arts specialization in either the MFA or MA streams in the School of Arts, Media, Performance and Design	
	ARTM 6301 3.00 TRANSFORMATION IN MEDIA AND CULTURE	
YEAR 2		
FALL	MGMT 6150 3.00 SKILLS FOR LEADERSHIP	
	OMIS 5110 1.50 INFORMATION SYSTEMS	OMIS 5120 1.50 QUANTITATIVE METHODS
	ECON 5100 3.00 THE ECONOMIC ENVIRONMENT OF BUSINESS	
	MKTG 5200 3.00 MARKETING MANAGEMENT	
	ACTG 5100 3.00 FINANCIAL ACCOUNTING FOR MANAGERS	
WINTER	SUST 5200 3.00 BUSINESS AND SUSTAINABILITY	
	ACTG 5210 1.50 MANAGEMENT ACCOUNTING	OMIS 5210 1.50 OPERATIONS MANAGEMENT
	ORGS 5200 3.00 LEADING PEOPLE AND ORGANIZATIONS	
	FINE 5200 3.00 MANAGERIAL FINANCE	
	SGMT 5200 3.00 STRATEGY	
SUMMER	Students generally undertake an internship after completing their second year in the program (and having fulfilled all their 5000 level and MGMT 6150 3.00 core MBA requirements) *Optional	
YEAR 3		
	The balance of required courses in the student’s fine arts specialization in either the MFA or MA streams in the School of Arts, Media, Performance and Design	
	MGMT 6090 0.00 STRATEGY FIELD STUDY FORMATION	
	MGMT 6100 3.00 STRATEGY FIELD STUDY	
	SCHULICH ELECTIVE(S) (9.00-12.00 CREDITS)	



**FIND MBA/MFA/MA PROGRAM  
DETAILS ONLINE!**

[schulich.yorku.ca/programs/mba-mfa-ma](https://schulich.yorku.ca/programs/mba-mfa-ma)



Electives



Core Foundation Courses

OPTION 2: SCHULICH START

YEAR 1

MBA 1 REQUIREMENTS

Students will take ~~27.00~~ credit hours of the Required Foundations of Management 5000 level Core Courses and ~~MGMT 6150 3.00~~ in the first year of study, and ~~SB/ARTM 6301 3.00~~ ~~Issues in Arts and Cultural Management~~, for degree credit at Schulich. They may also take a course in their Fine Arts field for degree requirement in the MFA or MA. To be eligible to advance to the next year of the joint program, students require a GPA of 5.00 (B), in their first year of study at Schulich.

YEAR 1 SUMMER

(optional)

Students may choose to undertake an internship after completing their first year in the program.

YEAR 2

MFA/MA CORE REQUIREMENTS

Students will take the core course requirements in their Fine Arts area. In some cases, students may take ~~Strategic Management 6000 3.00~~ in SSB and may complete their Strategy Field Study (MGMT 6090 0.00 and MGMT 6100 3.00) in this year of study.

YEAR 2 SUMMER

(optional)

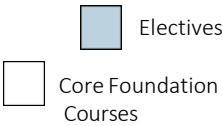
Students may choose to undertake an internship in this semester, if not already completed.

YEAR 3

MFA/MA and MBA REQUIREMENTS

Students will complete the requirements in both programs during this final year of study. Students should take ~~Strategic Management 6000 3.00~~ and their Strategic Field Study (MGMT 6090 0.00 and MGMT 6100 3.00) in the fall semester, if not already completed.

Students will also complete their Master’s Research Paper (MRP) or Thesis and the balance of their course requirements in each program over the two semesters.



JOINT MBA/MFA AND MBA/MA AT-A-GLANCE

OPTION 2

YEAR 1		
FALL	MGMT 6150 3.00 SKILLS FOR LEADERSHIP	
	OMIS 5110 1.50 INFORMATION SYSTEMS	OMIS 5120 1.50 QUANTITATIVE METHODS
	ECON 5100 3.00 THE ECONOMIC ENVIRONMENT OF BUSINESS	
	<del>ORGS 5100 3.00</del> <del>ORGANIZATIONAL BEHAVIOUR</del>	
	ACTG 5100 3.00 FINANCIAL ACCOUNTING FOR MANAGERS	
WINTER	SUST 5200 3.00 BUSINESS AND SUSTAINABILITY	
	ACTG 5210 1.50 MANAGEMENT ACCOUNTING	OMIS 5210 1.50 OPERATIONS MANAGEMENT
	<del>MKTG 5200 3.00</del> <del>MARKETING MANAGEMENT</del>	
	FINE 5200 3.00 MANAGERIAL FINANCE	
	<del>ARTM 6301 3.00</del> <del>TRANSFORMATION IN MEDIA AND CULTURE</del>	
SUMMER*	Students may choose to undertake an internship after completing their first year in the program. *Optional	
YEAR 2		
MFA/MA CORE REQUIREMENTS Students will take the core course requirements in their Fine Arts area. Students <del>may take Strategic Management 6000 3.00 in SSB and</del> may complete their Strategy Field Study (MGMT 6090 0.00 and MGMT 6100 3.00) in this year of study.  SUMMER* Students generally undertake an internship after completing their second year in the program (and having fulfilled all their 5000 level <del>and MGMT 6150 3.00</del> core MBA requirements.) *Optional		
YEAR 3		
	The balance of required courses in the student’s fine arts specialization in either the MFA or MA streams in the School of Arts, Media, Performance and Design	
	MGMT 6090 0.00** STRATEGY FIELD STUDY FORMATION	
	MGMT 6100 3.00** STRATEGY FIELD STUDY	
	<del>SGMT 6000 3.00**</del> <del>STRATEGIC MANAGEMENT</del>	
	SCHULICH ELECTIVE(S) (6.00-9.00 CREDITS)	

OPTION 2: SCHULICH START

YEAR 1

MBA 1 REQUIREMENTS

Students will take 30.00 credit hours of the Required Foundations of Management 5000 level Core Courses in the first year of study and SB/ARTM 6301 3.00 Transformation and Creativity in Media, Entertainment & Culture for degree credit at Schulich. To be eligible to advance to the next year of the joint program, students require a GPA of 5.00 (B), in their first year of study at Schulich.

YEAR 1 SUMMER

(optional)

Students may choose to undertake an internship after completing their first year in the program.

YEAR 2

MFA/MA CORE REQUIREMENTS

Students will take the core course requirements in their Fine Arts area. In some cases, students may complete their Strategy Field Study (MGMT 6090 0.00 and MGMT 6100 3.00) in this year of study.

YEAR 2 SUMMER

(optional)

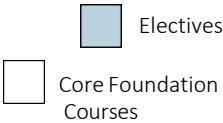
Students may choose to undertake an internship in this semester, if not already completed.

YEAR 3

MFA/MA and MBA REQUIREMENTS

Students will complete the requirements in both programs during this final year of study. Students should take their Strategic Field Study (MGMT 6090 0.00 and MGMT 6100 3.00) in the fall semester, if not already completed.

Students will also complete their Master’s Research Paper (MRP) or Thesis and the balance of their course requirements in each program over the two semesters.



JOINT MBA/MFA AND MBA/MA AT-A-GLANCE

OPTION 2

YEAR 1		
FALL	MGMT 6150 3.00 SKILLS FOR LEADERSHIP	
	OMIS 5110 1.50 INFORMATION SYSTEMS	OMIS 5120 1.50 QUANTITATIVE METHODS
	ECON 5100 3.00 THE ECONOMIC ENVIRONMENT OF BUSINESS	
	MKTG 5200 3.00 MARKETING MANAGEMENT	
	ACTG 5100 3.00 FINANCIAL ACCOUNTING FOR MANAGERS	
WINTER	SUST 5200 3.00 BUSINESS AND SUSTAINABILITY	
	ACTG 5210 1.50 MANAGEMENT ACCOUNTING	OMIS 5210 1.50 OPERATIONS MANAGEMENT
	ORGS 5200 3.00 LEADING PEOPLE AND ORGANIZATIONS	
	FINE 5200 3.00 MANAGERIAL FINANCE	
	SGMT 5200 3.00 STRATEGY	
SUMMER*	Students may choose to undertake an internship after completing their first year in the program. *Optional	
YEAR 2		
MFA/MA CORE REQUIREMENTS Students will take the core course requirements in their Fine Arts area. Students may complete their Strategy Field Study (MGMT 6090 0.00 and MGMT 6100 3.00) in this year of study.  SUMMER* Students generally undertake an internship after completing their second year in the program (and having fulfilled all their 5000 level and MGMT 6150 3.00 core MBA requirements.) *Optional		
ARTM 6301 3.00 TRANSFORMATION IN MEDIA AND CULTURE		
YEAR 3		
	The balance of required courses in the student’s fine arts specialization in either the MFA or MA streams in the School of Arts, Media, Performance and Design	
	MGMT 6090 0.00** STRATEGY FIELD STUDY FORMATION	
	MGMT 6100 3.00** STRATEGY FIELD STUDY	
	SCHULICH ELECTIVE(S) (9.00-12.00 CREDITS)	

## Schulich School of Business Memorandum

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To: Faculty Council, Schulich School of Business

From: Mike Valente, MBA Program Director and Henry Kim, Area Coordinator, OMIS

Date: November 30<sup>th</sup>, 2024

Re: New Course Proposal and Changes to the Supply Chain Management Specialization

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### **Motions:**

#### **That Faculty Council approve:**

- 1. A new course proposal for OMIS 6630 – Data Visualization and Storytelling**
- 2. The retirement of three OMIS courses**
- 3. Changes to the course list required to fulfill the Supply Chain Management Specialization**

### **Rationale:**

First, the new elective that is being proposed is nearly identical to the MBAN course with the name “Visual Analytics and Modelling.” However, the OMIS area would like to offer this course to MBA students as well as to MBAN students. However, they would prefer to do this in a way that segregates the MBA students from the MBAN students. The best way to do this is to propose a new course with an OMIS code but with the most updated title that better represents the learning outcomes for MBA students.

The OMIS area is streamlining their elective list due to some courses losing student interest and the need to make room for new courses.

Third, the OMIS area is streamlining its elective offerings, prompting a reassessment of its specializations. As part of a recent overhaul, we are updating the elective courses for the Supply Chain Management specialization to align with and support these broader changes. Many electives currently listed in the specialization have not been taught in the MBA program for several years due to demand and staffing constraints. The proposed updates address this reality by specifying courses that are planned and feasible to offer to MBA students moving forward.

# 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**

*Supply Chain Management*

**3. Responsible Unit:**

*OMIS*

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

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

*Fall 2025*

**6. Rationale for Change:**

Like other areas, the OMIS area is streamlining its elective offerings, prompting a reassessment of its specializations. As part of a recent overhaul, we are updating the core and elective courses for the Supply Chain Management specialization to align with and support these broader changes. Many electives currently listed in the specialization have not been taught in the MBA program for several years due to demand and staffing constraints. The proposed updates address this reality by specifying courses that are planned and feasible to offer to MBA students moving forward.

The rationale is that we want to streamline now to provide a cogent Supply Chain Management specialization that the job market will recognize and then later on provide even more options in the electives for students as need be.

*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 Supply Chain Management Specialization is designed to equip students with the skills to:

- Develop and implement supply chain strategies by mastering core topics in Supply Chain Management (OMIS 6560), ensuring a solid foundation in managing the flow of goods, information, and finances.
- Apply analytical and creative problem-solving approaches through elective courses such as Transportation and Logistics Management (OMIS 6210), Advanced Spreadsheet Modelling & Programming for Business (OMIS 6350), Project Management (OMIS 6750), and Design Thinking (OMIS 6620), enhancing students' ability to optimize supply chain operations and drive innovation.
- Master interpersonal and cross-functional collaboration skills critical to supply chain success, as developed through specialized courses like Negotiations (ORGS 6560), preparing students to navigate complex stakeholder relationships and decision-making processes effectively.

The proposed changes to the specialization promise the students a more focused and cogent learning of this topic. Central to that is adopting changes proposed here.

**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).*

## 9. Consultation:

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

Existing Specialization/Stream Information (Change From):	Proposed Specialization/Stream Information (Change To):
<p><b>Title: Supply Chain Management Specialization</b></p> <p><b>Requirements</b></p> <p>12.00 credits consisting of:</p> <ul style="list-style-type: none"> <li>• 3.00 credits of Required Courses</li> <li>• 9.00 credits of Elective Courses (<del>Supply Chain Management</del>)</li> </ul> <p><b>Required Courses</b></p> <ul style="list-style-type: none"> <li>• <u>OMIS 6560 3.00</u> SUPPLY CHAIN MANAGEMENT</li> </ul> <p><b>Elective Courses (<del>Supply Chain Management</del>):</b></p> <ul style="list-style-type: none"> <li>• <del>OMIS 6000 3.00</del> MODELS &amp; APPLICATIONS IN OPERATIONAL RESEARCH</li> <li>• <u>OMIS 6350 3.00</u> ADVANCED SPREADSHEET MODELLING &amp; PROGRAMMING FOR BUSINESS</li> <li>• <del>OMIS 6500 3.00</del> GLOBAL OPERATIONS AND INFORMATION MANAGEMENT</li> <li>• <del>OMIS 6700 3.00</del> MANAGING NEW TECHNOLOGY</li> <li>• <del>OMIS 6955 3.00</del> SERVICE OPERATIONS MANAGEMENT</li> <li>• <del>SGMT 6490 3.00</del> INTERNATIONAL NEGOTIATIONS – ANALYSIS, STRATEGY AND PRACTICE</li> </ul>	<p><b>Title: Supply Chain Management Specialization</b></p> <p><b>Requirements</b></p> <p>12.00 credits consisting of:</p> <ul style="list-style-type: none"> <li>• 3.00 credits of Required Courses</li> <li>• 9.00 credits of Elective Courses</li> </ul> <p><b>Required Courses</b></p> <ul style="list-style-type: none"> <li>• <u>OMIS 6560 3.00</u> SUPPLY CHAIN MANAGEMENT</li> </ul> <p><b>Elective Courses</b></p> <ul style="list-style-type: none"> <li>• <b>OMIS 6210 3.00</b> <b>TRANSPORTATION AND LOGISTICS MANAGEMENT</b></li> <li>• <u>OMIS 6350 3.00</u> ADVANCED SPREADSHEET MODELLING &amp; PROGRAMMING FOR BUSINESS</li> <li>• <b>OMIS 6750 3.00</b> PROJECT MANAGEMENT</li> <li>• <b>OMIS 6620 3.00</b> DESIGN THINKING</li> <li>• <b>ORGS 6560 3.00</b> NEGOTIATIONS</li> </ul>

**Originator:**



Signature

November 17, 2024

Date

Henry Kim

Name

OMIS

Area or Specialization

**Approvals:**

**Area or Specialization**

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



Signature

November 17, 2024

Date

Henry Kim

Name

OMIS

Area or Specialization

**Degree Program:**

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



Signature

November 19<sup>th</sup>, 2024

Date

Mike Valente

Name of Program Director

MBA Program

Program

**Program Committee:**

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

Kevin Tasa

Signature

January 9, 2025

Date

Kevin Tasa  
\_\_\_\_\_  
Name of Committee Chair

Masters Programs Committee  
\_\_\_\_\_  
Committee

## Schulich School of Business Memorandum

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To: Faculty Council, Schulich School of Business  
From: Mike Valente, MBA Program Director  
Date: March 10<sup>th</sup>, 2025  
Re: MBA New Course Proposal and Course Change Proposals

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### **Motion: That faculty council approve**

- 1) A new course: ORGS 5200 3.00 Leading People and Organizations.
- 2) Changes to ECON 5100 3.00: The Economic Environment of Business: course description, learning outcomes and addition of the ONLN delivery mode
- 3) Changes to OMIS 5110 1.50: Information Systems: Addition of the ONLN delivery mode
- 4) Changes to OMIS 5120 1.50: Quantitative Methods: course description, learning outcomes, and addition of ONLN delivery mode)
- 5) Changes to MGMT 6150 3.00: Skills for Leadership: course number
- 6) Changes to SUST 5200 3.00: Business and Sustainability: prerequisites

### **Rationale:**

**New Course: ORGS 5200 3.00: Leading People and Organizations** This course aims to replace ORGS 5100 3.00 Organizational Behaviour. ORGS 5100 3.00 is currently offered to both the MBA and Master of Management programs. However, the changes to ORGS 5100 that stem from the MBA redesign are inconsistent with the objectives of the Master of Management program. First the title needed to better reflect its role in the MBA program, the content covered in the course, and the names employed by competitor business school. Second, the course description and learning outcomes of this course need to better incorporate sustainability and diversity, equity and inclusion content, which is a key point of distinction for the Schulich MBA and explicit in MBA Program Learning Outcomes. Third, the course description and learning outcomes must avoid any overlap in content with MGMT 6150 (Skills for Leadership) and ensure that they better reflect the material needed for its role in the MBA program. Fourth, in the spirit of the upcoming changes to the MBA program, this course is scheduled to be in Term 2 of the program (see accompanying minor program change proposal). Because of this, it is important to add a prerequisite to ensure that students already possess some functional-based knowledge in Term 1 before taking this course. Because of this, it is best to distinguish this course across programs so that the current course (ORGS 5100 3.00 Organizational Behaviour) remains with the Master of Management and the new course (ORGS 5200 3.00 Leading People and Organizations) becomes part of the MBA curriculum.

**ECON 5100 3.00: The Economic Environment of Business:** This change proposal reflects recent efforts to position the Schulich MBA program as a program that better integrates sustainability into its curriculum, something that is now explicit in the MBA Learning Outcomes. To this end, this proposal aims to amend the course description and learning outcomes to reflect this objective. The area has also taken this opportunity to update and modernize these course components.

**Addition of ONLN Delivery Mode: (ECON 5100 3.00; OMIS 5110 1.50; OMIS 5120 1.50).** Several courses listed in

this motion are adding an ONLN delivery mode. As part of the MBA Program's efforts to increase flexibility in the delivery mode through which students can pursue a Schulich MBA, this course is offering a remote section for MBA students. The remote section will encompass a combination of asynchronous and remote synchronous learning with all assessments conducted remotely. That said, the course description and course learning outcomes remain identical to the remaining sections of the course. Any anticipated changes to the assessments (e.g. replacement of a final exam with an alternative assessment) will be made so long as they contribute to the achievement of course learning outcomes and proceed through the proper governance approval process.

**Change in Prerequisites (SUST 5200 3.00):** This course is now positioned at a point in the MBA program that requires students to have a minimum number of functions-based courses. This is important to distinguish program learning outcome 1 (foundational knowledge in functions) from program learning outcome 2 (organization and strategic level competence). Because we view these two learning outcomes as developmental, it is essential that students generate a sufficient level of knowledge in the functions before embarking on organizational and strategic level thinking. As a result, this course will include a prerequisite of 15 5000 level course credits.

**MGMT 6150 3.00: Change in Course Number:** In 2024, this course number was changed to 6150 from 5150 to accommodate a change to the program requirements of accelerated students that required them to take this course. Because accelerated students would be taking this course concurrent to SGMT 6000 3.00, which has 5150 as a prerequisite, we elected to change the rubric to overcome this constraint. However, recent changes to the MBA program have led to a change to the Strategic Management course from SGMT 6000 3.00 to SGMT 5200 3.00. This allows us to revert back to MGMT 5150 3.00, which is consistent with its role as a 1st year course.

# 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:**

*Organization Studies*

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

*ORGS 5200*

**4. Credit Value:**

*3.00*

**5. Long Course Title:**

Leading People and Organizations

**6. Short Course Title:**

Leading People and Organizations

**7. Effective Term/Calendar Year:**

*Fall 2025*

**8. Language of Instruction:** English

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

This course creates a knowledge base from which students develop organizational competence. Students examine how the various components of an organization, including individuals, groups, leaders, processes, structures, systems, and culture, explain organizational behaviour and performance. Students gain insights into the interplay between organizational behavior and pressing societal concerns, enabling them to lead diverse and inclusive teams and contribute to a sustainable and equitable future. Prerequisite: A minimum of 15 credits of 5000-series Required Foundations of

Management Core Courses. Course Credit Exclusion: ORGS 5100 3.00: Organizational Behaviour.

### **10. Expanded Course Description:**

The environment of contemporary organizations is increasingly turbulent. The turbulence stems from such forces as globalization, technological change and threats to the physical environment. The implication is unavoidable: managing contemporary organizations is becoming both ever more important, and increasingly challenging.

This course introduces the discipline of Organizational Behaviour to aspiring leaders who want to make a difference in their organizations. Organizational Behaviour is the study of individual, interpersonal, group, and organizational processes that shape the management and performance of organizations. The course is designed to enhance your understanding of these processes and provide you with a wide range of skills and perspectives to help you become more effective managers and organizational members.

The course begins with a brief overview of organizational-level issues and processes. We consider what organizations are and why it is important to study OB. We then discuss and explain how the key personal characteristics of organizational members (e.g., abilities, attitudes, personality, values, expertise, and experience) affect individual decisions and actions and how they shape their interactions with other organizational members. This section concludes with an examination of motivation in organizations. Theories that provide direction for managing organizational members effectively are analyzed and appraised with a strong focus on application.

Special attention is also given to the role of teams in organizations, the stages of group development, and the actions that can support the development of effective groups. Issues related to individual and group decision-making and problem-solving are examined, and tools to support these processes are presented and applied, such as exploring alternative ways to reconfigure assigned tasks, specify job requirements, and/or rearrange individual and group responsibilities.

We will continue our focus on social interaction as we look at the use of power, leadership, communication, decision-making, conflict and negotiation. The course closes with an overview of organizational-level decisions and processes. In this section, we will examine the effects of organizational culture and structure, and its impact on organizational socialization. We explore the reasons why organizations exist, the varied structural forms they can take, and the levers leaders may use to increase organizational effectiveness. We look at organizational design and structure by exploring alternative ways to configure tasks and/or rearrange individual and group responsibilities. Lastly, we will explore emerging challenges and organizational change.

### **11. Course Learning Outcomes:**

1. **Deepen Knowledge and Application of Organizational Behaviour (OB) Theories:** Expand understanding of Organizational Behavior frameworks and theories while developing the ability to apply them to real-world challenges, such as fostering ethical leadership and driving sustainable business practices.
2. **Processes of Change in Organizations:** Analyze and manage organizational change processes effectively, aligning change initiatives with organizational objectives and addressing resistance to change.
3. **Diversity, Equity, and Inclusion (DEI):** Explore strategies to build inclusive workplaces by understanding the impact of diversity and equity on organizational performance, fostering collaboration, and promoting fairness.
4. **Link Between Individual, Team, and Organizational Performance:** Examine how individual behaviors, team dynamics, and leadership styles influence organizational effectiveness, productivity, and overall performance.
5. **Leadership and Organizational Success:** Critically evaluate various leadership theories, including transformational and ethical leadership, to enhance decision-making, inspire teams, and drive organizational success.
6. **Integrating OB into Strategic Objectives:** Develop the ability to connect OB principles to broader organizational goals, such as improving culture, enhancing employee engagement, and ensuring alignment with corporate strategy.

## 12. Rationale:

This course is being proposed to replace ORGS 5100 3.00 – Organizational Behaviour. ORGS 5100 is a course offered to both the Masters of Management and MBA students. Given the MBA redesign taking place, this course needs to undergo changes that do not necessarily align with the program outcomes of the Masters of Management program. As a result, the best course of action is to leave ORGS 5100 as is for the Masters of Management Program and propose a new separate course with the rubric ORGS 5200.

This course departs from ORGS 5100 in the following ways. The first is the title. The new title, Leading People and Organizations, is a better reflection of its role in the MBA program which emphasizes leadership, the content covered in the course, and is consistent with competitor business school course names. Second is that the course description and learning outcomes better incorporate sustainability and diversity, equity and inclusion content, which is a key point of distinction for the Schulich MBA. Third, the proposal updates the course description and learning outcomes to remove any overlap in content with MGMT 6150 (Skills for Leadership) and to ensure that they better reflect the material needed for its role in the MBA program. Fourth, in the spirit of the upcoming changes to the MBA program, this course is scheduled to be in Term 2 of the program (see accompanying minor program change proposal). Because of this, it is important to add a prerequisite to ensure that students already possess some functional-based knowledge in Term 1 before taking this course.

Finally, this proposal allows for both a LECT and ONLN delivery mode. As part of the MBA Program's efforts to increase flexibility in the delivery mode through which students can pursue a Schulich MBA, this course is offering a remote section for MBA students. The remote section will encompass a combination of asynchronous and remote synchronous learning with all assessments conducted remotely. That said, the course description, and course learning outcomes remain identical to the remaining sections of the course. Some changes to the assessments from the regular in-person sections are required to acknowledge the challenges of a remote environment. These adjustments are provided in Appendix A

### 13. Evaluation:

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

Assignment/Task	Quantity	% Weight	Total %	Author
Mini-test #1 ( <b>Class 6</b> )	1	25	25	Individual
Mini-test #2 ( <b>Class 10</b> )	1	25	25	Individual
Team Case analysis ( <b>Class 12</b> )	1	25	25	Team
Team learning contribution ( <b>By assignment</b> )	1	15	15	Team
Class participation	1	10	10	Individual
			<b>100%</b>	

Note: Students will be randomly assigned to teams by the second week of class, with team presentations beginning on week 4.

For details, see "Written Assignments/Projects and Exam[s]: Descriptions" (p. 10) and "Evaluation ..." (p. 11) of the attached syllabus.

### 14. Integrated Courses:

NA

### 15. Cross-listed Courses:

NA

### 16. Enrolment Notes:

This course is restricted to Schulich MBA students. As stated above, this course will have both an LECT and ONLN delivery mode.

### 17. Faculty Resources:

This course will be offered in the winter and summer terms at a minimum. All faculty in the Organization Studies area qualified to teach this course including but not limited to

Ruodan Shao  
Brent Lyons  
Winnie Shen  
Chris Bell  
Stephen Friedman  
Ivona Hideg

### **18. Physical Resources:**

There are no unusual physical resources required to run this course outside of what is required in any Schulich course.

### **19. Bibliography and Library Statement:**

A library statement has been attached to this proposal.

# New Course Proposal Template

## (Part B - Schulich Use Only)

### 20. Instructors and Faculty Coordinator

**Initial instructor:**

Ruodan Shao

**Alternative instructors:**

Stephen Friedman, Brent Lyons, Ivona Hideg

**Course coordinator:**

Ruodan Shao

### 21. Specializations

**Primary area or specialization:**

The course is listed as a core course in the MBA program curriculum.

**Secondary areas or specializations:**

NA

### 22. Student Contact and Enrolment

**Contact hours:**

Because this course is offered in both LECT and ONLN delivery modes, contact hours will vary. For LECT sections, contact hours will be approximately 36. For ONLN sections, contact hours will be approximately 20 through synchronous remote delivery with the rest made up of asynchronous content. Note that there is a slight variation in assessments between the LECT course sections and the ONLN course sections as explained in Appendix A.

**Maximum enrolment:**

Maximum of 55 students

**Expected enrolment:**

40-55 students

**Evidence for enrolment expectations:**

This is a required course. Thus, enrollment expectations are consistent with student enrollment in the MBA program

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

As stated below, equity diversity and inclusion represents one of the six learning outcomes of this course.

***Learning Outcome #3: Diversity, Equity, and Inclusion (DEI):** Explore strategies to build inclusive workplaces by understanding the impact of diversity and equity on organizational performance, fostering collaboration, and promoting fairness.*

**24. Human Participants Research**

NA

**25. Conditions for Approval**

NA

a) **The Area is deleting courses with at least the same total number of credits.**

NA

b) **Provide a convincing case for the proposed course.**

NA

**Originator:**

Mike Valente

Signature

March 24<sup>th</sup>, 2025

Date

Mike Valente

Name

MBA Program

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.

Chris Bell

Organization Studies

Olaf Weber

Sustainability

David Rice

Marketing

Shanker Trivedi

Accounting

Majid Majzoubi

Strategic Management

Maxim Voronov

Sustainability

## 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.

RShao

March 24<sup>th</sup>, 2025

Signature

Date

Ruodan Shao

Organization Studies

Name of Coordinator or Director

Area or Specialization

### Degree Program:

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

Mike Valente

March 24<sup>th</sup>, 2025

Signature

Date

Mike Valente

\_\_\_\_\_  
Name of Program Director

MBA Program

\_\_\_\_\_  
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*

\_\_\_\_\_  
Signature

*April 3, 2025*

\_\_\_\_\_  
Date

Kevin Tasa

\_\_\_\_\_  
Name of Committee Chair

Master Programs Committee  
Committee

*Appendix A: Remote Section Assessment Details*

Assessment Component	In-Person Sections	Remote Sections	Explanation
1. Quiz 1 & 2	25% each	20% each (40% Total)	The 5% reduction for each of these allows us to include a new, additional assessment in the course. Details below.
2. Team Case Analysis	25%	20%	The 5% reduction for this allows us to enhance the class engagement requirement. Details below.
3. Team Learning Contribution	15%	10%	See below.
4. Class Participation and Engagement (was "Class Participation")	10%	20%	This change allows for a greater emphasis on not only showing up for the on-line classes, but to reflect the added need for more active engagement in the virtual format. This will include contribution during the synchronous learning activities and successful completion of asynchronous tasks.
5. Organizational Behaviour "Thought Leader" Assignment (detailed below)	n/a	10%	<p>The reduction across other assignments allow for an assignment both unique to and relevant to the virtual format. The reasoning is as follows:</p> <p><b>(a)</b> to do something that is more in line with the nature of a digital 'virtual' environment - the short, 'blog-like' format is becoming a very common way for managers to communicate the outcomes of organizational behaviour analyses, from performance reviews and employee feedback, to communicating ideas for motivation, decision making and other areas.</p> <p><b>(b)</b> to provide a realistic avenue for students to both learn about and participate in the requirements for thought leadership in organizational behaviour - top managers and leaders are required to gain experience and exposure on blogs, or LinkedIn to</p>

			<p>enhance their impact, credibility and as evidence of forward thinking.</p> <p><b>(c)</b> to create an assignment that is (for lack of better expression) less saturated and/or amenable to the use of AI.</p> <p><b>(d)</b> to provide a way to interact with real leaders/managers as a path to the application of theory and at the same time, provide a start to the essential skills for networking, and collecting information for their future careers.</p> <p><b>(e)</b> to do an assignment that is in essence a small group, making student collaboration, motivation and quality work more likely.</p> <p><b>(f)</b> because it will be of interest to students</p>
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### **Organizational Behaviour “Thought Leader” Assignment (10%)**

For this assignment, teams will use the blog style “Case Report” to post a series of 3 Linked-In posts over the semester on the “ORGS 5100 Thought Leaders of Organizational Behaviour” LinkedIn page. The posts should contain at least one visual element (i.e. picture or video).

The posts will be between 450-750 words, which is the upper limit allowed by LinkedIn. The post should captivate the audience with its depth, originality, and relevance to current trends and future directions in the field.

Student teams will choose their best of the 3 for their grade evaluation. They will also submit the interview transcript and a short reflection on the process of interviewing and working as a team.

# ORGS 5200 3.00 Section A: Leading People and Organizations



## Course Outline

Fall 2024

Tuesdays 11:30 a.m.-2:30 p.m., beginning September 10, 2025  
N105 Seymour Schulich Building

### Instructor

Ruodan Shao  
N303F Seymour Schulich Building  
(416) 736-2100 ext. 77917  
rshao@schulich.yorku.ca  
Office hours: By appointment, please e-mail the instructor

### Assistant

Carla D'Agostino  
N303A SSB  
(416)-736-5095  
cd'agostino@schulich.yorku.ca

Dr. Ruodan Shao is an Associate Professor and Area Coordinator of Organization Studies at the Schulich School of Business, York University. Her research focuses on business ethics, corporate social responsibility, organizational justice, cross-cultural management, and strategic human resource management. With a teaching career spanning over a decade, she has taught undergraduate, MBA, and PhD courses in organizational behavior, leadership, and change management. Dr. Shao is a recipient of multiple teaching awards and is recognized for her ability to bridge academic research with practical business applications. She has published extensively in top-tier management journals and has been invited to present her research globally.

## Brief Description

This course creates a knowledge base from which students develop organizational competence. Students examine how the various components of an organization, including individuals, groups, leaders, processes, structures, systems, and culture, explain organizational behaviour and performance. Students gain insights into the interplay between organizational behavior and pressing societal concerns, enabling them to lead diverse and inclusive teams and contribute to a sustainable and equitable future.

Prerequisite: A minimum of 15 credits of 5000-series Required Foundations of Management Core Courses. Course Credit Exclusion: ORGS 5100 3.00: Organizational Behaviour

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## Course Learning Outcomes

The environment of contemporary organizations is increasingly turbulent. The turbulence stems from such forces as globalization, technological change and threats to the physical environment. The implication is unavoidable: managing contemporary organizations is becoming both ever more important, and increasingly challenging.

This course introduces the discipline of Organizational Behaviour to aspiring leaders who want to make a difference in their organizations. Organizational Behaviour is the study of individual, interpersonal, group, and organizational processes that shape the management and performance of organizations. The course is designed to enhance your understanding of these processes and provide you with a wide range of skills and perspectives to help you become more effective managers and organizational members.

The course begins with a brief overview of organizational-level issues and processes. We consider what organizations are and why it is important to study OB. We then discuss and explain how the key personal characteristics of organizational members (e.g., abilities, attitudes, personality, values, expertise, and experience) affect individual decisions and actions and how they shape their interactions with other organizational members. This section concludes with an examination of motivation in organizations. Theories that provide direction for managing organizational members effectively are analyzed and appraised with a strong focus on application.

Special attention is also given to the role of teams in organizations, the stages of group development, and the actions that can support the development of effective groups. Issues related to individual and group decision-making and problem-solving are examined, and tools to support these processes are presented and applied, such as exploring alternative ways to reconfigure assigned tasks, specify job requirements, and/or rearrange individual and group responsibilities.

We will continue our focus on social interaction as we look at the use of power, leadership, communication, decision-making, conflict and negotiation. The course closes with an overview of organizational-level decisions and processes. In this section, we will examine the effects of organizational culture and structure, and its impact on organizational socialization. We explore the reasons why organizations exist, the varied structural forms they can take, and the levers leaders may use to increase organizational effectiveness. We look at organizational design and structure by exploring alternative ways to configure tasks and/or rearrange individual and group responsibilities. Lastly, we will explore emerging challenges and organizational change.

## Learning outcomes

### 1. **Deepen Knowledge and Application of Organizational Behaviour (OB) Theories**

Expand understanding of Organizational Behavior frameworks and theories while developing the ability to apply them to real-world challenges, such as fostering ethical leadership and driving sustainable business practices.

### 2. **Processes of Change in Organizations**

Analyze and manage organizational change processes effectively, aligning change initiatives with organizational objectives and addressing resistance to change.

### 3. Diversity, Equity, and Inclusion (DEI)

Explore strategies to build inclusive workplaces by understanding the impact of diversity and equity on organizational performance, fostering collaboration, and promoting fairness.

### 4. Link Between Individual, Team, and Organizational Performance

Examine how individual behaviors, team dynamics, and leadership styles influence organizational effectiveness, productivity, and overall performance.

### 5. Leadership and Organizational Success

Critically evaluate various leadership theories, including transformational and ethical leadership, to enhance decision-making, inspire teams, and drive organizational success.

### 6. Integrating OB into Strategic Objectives

Develop the ability to connect OB principles to broader organizational goals, such as improving culture, enhancing employee engagement, and ensuring alignment with corporate strategy.

## 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
Mini-test #1 (Class 6)	1	25	25	Individual
Mini-test #2 (Class 10)	1	25	25	Individual
Team Case analysis (Class 12)	1	25	25	Team
Team learning contribution (By assignment)	1	15	15	Team
Class participation	1	10	10	Individual
			<b>100%</b>	

Note: Students will be randomly assigned to teams by the second week of class, with team presentations beginning on week 4.

For details, see “Written Assignments/Projects and Exam[s]: Descriptions” (p. 10) and “Evaluation ...” (p. 11).

## Course Material

### 1. Required Textbook:

***Principles of Organizational Behavior: The Handbook of Evidence-based Management. Third Edition. Edited by Craig L. Pearce and Edwin A. Locke. Wiley Publishing.***

Digital copy available through York Library.

**2. Additional reading materials.** They have been prepared to supplement the required text and are posted on CANVAS. Students are expected to have read the assigned readings before attending each class session. These materials are available free through the library. You may access them through the York library databases. Harvard Business Review no longer allows us to post links to articles on the

e-reserve, so you will have to access them individually through the library databases. See the instructions that follow on how to do that.

### Finding Harvard Business Review Articles from a Citation

Harvard Business Review articles can be found using the library web site by following the instructions given here where a sample citation is used for illustrative purposes.

#### Sample Citation:

Bloom, N, Sadun, R, Van Reenen J. "Does Management Really Work?" *Harvard Business Review*. November 2012, 90(11): 76-82.

- Go to the library web site at <http://www.library.yorku.ca>
- Search Harvard Business Review as "Periodical Title"
- Click on the link labeled Business Source Premier which appears under "Online Access" in the record for the Harvard Business Review
- At this point **you can either search or browse for the article needed**
  - **Search for the article needed** by selecting the "Search within this publication" option which appears in the top right part of the screen when the record for Harvard Business Review loads in Business Source Premier
  - Enter the title of the article in quotes i.e. "does management really work" and select "Title" from the list of drop down menu options provided:
  - The article will appear including a link to the PDF version.
  - **Browse for the article needed** by selecting the year the article was published i.e. 2012, and then browsing to the relevant month, i.e. November:
  - Then look for the article you need from the Table of Contents which appears for this Nov. 2012 issue of Harvard Business Review. In this case the article begins on page 76 (note that articles file in page number order). Note that this appears on page 2 and a link to the PDF of the article is provided.

**3. Canvas (course materials database).** It contains general information for Schulich students and course materials specific to this course. Check it frequently.

### Student Preparation for Class and Class Participation: Expectations

**Preparation.** The course uses a wide range of pedagogy to enhance and facilitate learning. Each session will include a lecture component as well as discussion, case analyses and experiential exercises. The focus will be on application of concepts and practice of managerial skills. Active student participation is an important part of the collective learning process. Students will be expected to have read the material assigned to each session **prior** to class and be prepared to actively engage in discussions and share their experience.

**Class Participation (contribution).** In addition to the written assignments and tests you will be expected to contribute to the class in two ways: through engaging in class discussions and a facilitated learning project. You will be expected to be present and prepared for class and willing to share your insights on the content and cases assigned for the day. You will be expected to contribute by offering original thinking, developing and building on the thoughts of others, offering well thought-out critiques, and moving the class discussion forward.

Each team will also prepare a 15-20 minute learning experience on the topic of one class session. You will work in teams assigned at the beginning of the course and team presentations will begin in week 4. You could present a short video, a skit and experiential exercise or a presentation on the topic of the day. Try not to simply repeat the material from the text and readings. Instead integrate or apply this material in innovative and engaging ways. You will be judged on creativity and how well you are able to link the experience to the content for the day.

## Class-by-Class Syllabus

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 in the course Canvas notifying students of the change.

## OUTLINE OF SESSIONS

### 1. *Overview: Course introduction and Introduction to Organizational Behavior*

In this first session of **Organizational Behavior**, students will gain an overview of the course and its key themes. We will explore the history and development of research on organizational effectiveness, highlighting the critical role of **work organizations** in contemporary society. Discussions will focus on how **environmental turbulence, globalization**, and challenges such as **climate change** impact organizational functioning, using examples from well-known organizations.

This class will also emphasize how leaders can improve employee motivation and organizational effectiveness, while considering principles of **sustainability, Environmental, Social, and Governance (ESG), Responsible Business**, and **diversity, equity, and inclusion (DEI)**. This course is aim to enhance our understanding of how organizations can thrive responsibly and ethically in a rapidly changing world.

Text:

Articles: Hougard, R., & Carter, J. (2021). Becoming a more humane leader. Harvard Business Review, digital article.

Valcour, M. (2020). Anyone can learn to be a better leader. Harvard Business Review, digital article.

### 2. *Personality, Learning and Perception*

This and the following session are concerned with individuals - how people differ in ways that are relevant to their behaviour in organizations. In the first session we will explore personality and the ways in which different aspects of personality influence, or fall under the influence, of organizations. We will also begin to examine perception and the ways in which perception affects attitudes and behaviours.

Text: Chapter 2

Articles: Chamorro-Premuzic, T. (2017). Could your personality derail your career? Don't take these traits to the extreme. *Harvard Business Review*, 95(5), 138-141.

HBR (August, 2021). "3 Traits You Need to Thrive in a Hybrid Work Environment".

### **3. Attitudes, Values, Diversity and Work Behaviour**

In this session we continue to explore the impact of individuality on behaviour in organizations. We will explore the extent to which diverse sets of values and attitudes influence individual perception, and how those perceptions create the partial, personal model of reality on which individuals act.

Text: Chapters 4 and 28

Articles: HBR (May, 2021). "High Performing Teams Start with a Culture of Shared Values".  
HBR (August, 2019). "Generational Differences At Work Are Small. Thinking They're Big Affects Our Behavior".

### **4. Motivation at Work**

Organizations exert influence on employees through the use of rewards and sanctions including pay, praise, promotions and various penalties. These actions are mediated by the organization through its formal and informal evaluation and reward processes. Traditional and innovative organizational practice in this area is the focus in this session.

Text: Chapters 5, 7, and 12

Articles: HBR (April, 2020). "How to Keep Your Team Motivated, Remotely".  
HBR (December, 2018). "The Case for the 6-Hour Workday".

### **5. Groups and Work Teams**

In many organizations, groups are becoming a primary mode through which people accomplish the work of the organization. Effectively managing groups and contributing to group-based tasks requires an understanding of group dynamics and development. This session examines the fundamental processes and influences of groups in organizations.

Text: Chapters 18 and 19

Articles:

Sunstein, C., & Hastie, R. (2014). Making dumb groups smarter. *Harvard Business Review*, 92(12), 91-98.

Haas, M. & Mortensen, M. (2016). The secrets of great teamwork. *Harvard Business Review*, 94(6), 70-76.

### **6. Mini Test 1**

### **Reading Week**

### **7. Conflict and Negotiation**

Organizations are never completely rationalized, and tasks and environments are never completely stable. Conflict and its resolution are, therefore, crucial to the functioning of organizations. In this session we consider the dynamics of conflict with a particular focus on negotiation as a mechanism for managing conflict and creating value.

Text: Chapters 20 and 24

Articles: Sebenius, J. K. (2001). Six Habits of Merely Effective Negotiators. (Negotiators must have a focused strategy). *Harvard Business Review*, 79(4), 87-95.

Malhotra, D. (2014). 15 rules for negotiating a job offer. (Managing Yourself). *Harvard Business Review*, 92(4), 117-120.

## **8. Leadership and Power**

Organizations of the future will require leadership approaches that not only adapt to rapidly changing environments but also prioritize sustainability, diversity, equity, and inclusion (DEI), and the principles of Responsible Business. In this session, we will examine and compare new leadership frameworks, including empowerment and transformational leadership, with conventional approaches. Students will explore how these frameworks contribute to building more inclusive, equitable, and sustainable organizations capable of addressing complex global challenges.

Text: Chapters 14, 15, and 16

Articles: Leadership across cultures. (2015). *Harvard Business Review*, 93(5), 30–31.

Ibarra, H. (2015). The authenticity paradox. *Harvard Business Review*, 93(1,2), 52-59.

## **9. Organizational Structure**

From "classical management theory" and bureaucracy, to contingency theory and contemporary approaches such as the learning organization, the question of an ideal organizational structure remains. This session will explore the range of alternative organizational structures and the factors which influence their emergence, development and effectiveness.

Text: Chapter 29

Case: Sangeeta Shah Bharadwaj. (2015). Case Study: Can a work-at-home policy hurt morale? *Harvard Business Review*, 93(4), 105-109. (For class discussion)

## **10. Mini Test 2**

## **11. Organizational Culture**

This session goes beyond the assumption that managers can design an ideal structure, to look at the role of corporate culture in organizational functioning. We will explore norms, values and patterns of behaviour that allow insight into culture.

Text: Chapter 28

Articles: Groysberg, B., Lee, J., Price, J., & Cheng, J. Y.-J. (2018). What's Your Organization's Cultural Profile? (cover story). *Harvard Business Review*, 96(1), 53.

Case: Garvin, David A. (2014). Can a strong culture be too strong? Leaders at an IT services firm contemplate whether its family-like atmosphere draws talent in or drives it away. (HBR Case Study). *Harvard Business Review*, 92(1-2), 113-117. (For class discussion)

## **12. Environment, Strategy and Change in Organizations**

This session provides an introduction to the forms of and responses to environmental change, emphasizing the need for organizations to align their business practices with the UN Sustainable Development Goals (SDGs) and principles of sustainability. Key topics include navigating the challenges posed by climate change, fostering diversity, equity, and inclusion (DEI) in organizational transitions, and adopting Responsible Business practices that prioritize social and environmental considerations. This session will equip students with the tools to lead and manage change in ways that drive both organizational success and broader societal impact.

Text: Chapters 13 and 29

Articles: Beer, Michael, & Nohria, Nitin. (2000). Cracking the code of change. (Statistical Data Included). *Harvard Business Review*, 78(3), 133-141.

Meyerson, Debra E. (2001). Radical change, the quiet way. (changing corporate culture). *Harvard Business Review*, 79(9), 92-104.

Case: Wetlaufer, Suzy. (1998). After the layoffs, what next? (a hypothetical case study). *Harvard Business Review*, 76(5), 24-42. (For class discussion)

### **Written Assignments/Projects and Exam[s]: Descriptions**

Please submit all written assignments in hard copy in 12-point font, double-spaced, and adhere strictly to page limits.

Team learning contribution: BY TEAM ASSIGNMENT TO DATES (15%)

Each team will prepare and present a 15-20 minute presentation based on the topic of the day. Please try to avoid repeating material from the text or readings. Instead try to engage the class with a participative, creative take on the material. For example, you could create a video, organize a simulation or game or put on a skit. You will be evaluated on creativity, links to topics in the course, time management and presentation skills.

Mini-tests: Class 6 and Class 10 (25% each)

These are short in class tests designed to test your familiarity with course concepts and your ability to apply the theories and concepts in a business setting. The test will require you to answer short questions based on the course material covered until that date.

Team Case analysis: Due last class (25%)

In 10 pages prepare a team case analysis of the case handed out in class. Check the Canvas for more details.

The case analysis is due in class in hard copy. The case write-up should include:

- An executive summary offering an overview of your analysis
- Identification of the major issues in the case
- A situational analysis that explores causes and context of the problems
- Criteria that you will use to evaluate potential solutions
- Alternative courses of action that may address the problems
- Your plan of action including implementation and justification

### Evaluation of Written Assignments/Projects and Exams

All assignments are evaluated by the instructor. You will be evaluated on your familiarity with course concepts and your ability to apply them thoughtfully in organizational settings. On each written assignment you will be evaluated on content, creativity and presentation. Repeating material from the assigned reading material will not get you points, clear and critical thinking and good writing will! I am interested in what you make of the course material, not whether you can repeat it. Feel free to seek feedback by coming by to see me or by e-mail. Don't be afraid to criticize or to go out on a limb. But be prepared to offer constructive, well thought out plans of action.

### Calculation of Course Grade

Schulich grading policy does not require a preset translation of percentages into specific letter grades. In this class, final letter grades will be determined by the following process:

Each assignment will be returned to students with a numerical score. The numerical score of each assignment and the weight assigned to that assignment will then be summed into an overall numerical grade for the course. The overall numerical grade of the course will be converted to a letter grade for the course, using the 9 point grade scale for conversion. Late assignments will normally incur a penalty of one letter grade.

GRADE	GRADE POINT	PERCENTAGE	DESCRIPTION
A+	9	≥96-100	Exceptional
A	8	≥88-95	Excellent
A-	7	≥82-87	Very Good
B+	6	≥76-81	Good
B	5	≥71-75	Competent
B-	4	≥65-70	Marginally Competent
C+	3	≥60-64	Passing
C	2	≥55-59	Barely Passing
C-	1	≥50-54	Marginal Pass
F	0	< 50%	Failed

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

Masters 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 the 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/currentstudents/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/>

### *Tests (Absence from)*

Students who miss a test or the mandatory simulation must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence.

# MEMORANDUM

## York University Libraries

**To:** Mike Valente, MBA Program Director, Schulich School of Business

**From:** Sophie Bury, Teaching & Learning Librarian, Student Learning & Academic Success, York University Libraries

**Date:** March 27<sup>th</sup> 2025

**Subject:** Library Statement of Support – *ORGS 5200 – Leading People and Organizations*

### Summary

York University Libraries (YUL) is well positioned to support the proposed course ORGS 5200 – *Leading People and Organizations* proposed to form a new course in the MBA program redesign at the Schulich School of Business. This course examines how different components of an organization influence and impact organizational behaviour and performance, while giving students insights into the relationships between organizational behaviour and societal issues. It aims to equip students with competencies to lead diverse and inclusive teams and to contribute to a sustainable and equitable future. Students can make use of an array of library resources and services to meet their research and learning needs in this course. This statement highlights offerings related to the major themes of the course.

### Collections

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

Many materials exist in the collections, of relevance to various themes taught in this course with Library of Congress Subject Headings such as the following:

Organizational Behavior, Organizational Change, Leadership, Teams in the Workplace, Leadership – Moral and Ethical Aspects, Diversity in the Workplace, Corporate Culture, Social Responsibility of Business

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

The textbook which forms required reading for this course is available as an e-book at York University Libraries. Other readings take the form of articles available from the *Harvard Business Review*. We advise that the course instructor consult our [Harvard Business Review Guide](#) to obtain permalinks for these articles which can be used in Canvas or to refer students here to search for these articles via the library's subscription. 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 students need to consult allow for the content to be used in a course. It is noted that the students in this course will be required to engage in a team case analysis assignment. HBR and Ivey cases can be purchased directly through relevant publishing websites. Additionally, the Libraries have recently acquired [Sage Business Cases](#) and instructors are encouraged to explore relevant cases.

A selection of electronic databases of particular interest for this course, including the weekly topics and the course assignments, are highlighted below. The [A-Z list](#) on the Libraries' website provides a complete register of electronic offerings.

#### **Subject Databases (Mainly articles):**

- Proquest Business
- Business Source Complete
- PsycInfo
- Scholars Portal Journals

#### **Newspaper/Current Affairs Collections:**

- Factiva
- Nexis Uni
- PressReader

#### **Business Videos & Streaming Media**

- Films on Demand
- Curio.ca
- Sage Knowledge
- LinkedIn Learning

#### **eBook Platforms:**

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

## **Services**

#### **Library Instruction**

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

#### **Research Guides of Interest:**

- [Organizational Behaviour Research Guide](#)
- [Psychology Research Guide](#)
- [Business Ethics Guide](#)
- [Step-by-Step Business Research Tutorials](#)
- [Business Articles Guide](#)
- [Business Cases Guide](#)
- [Business Citation Guide](#)

## **Research Help**

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# Course Change Proposal Form

## Schulich School of Business

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

**1. Responsible Program:**

*Schulich MBA, Program*

**2. Responsible Unit:**

*ECON*

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

*ECON 5100*

**4. Credit Value:**

*3.00*

**5. Long Course Title:**

*The Economic Environment of Business*

**6. Short Course Title:**

*The Economic Environment of Business*

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

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

## **8. Effective Term/Calendar Year of Proposed Change(s):**

Fall 2025

## **9. Rationale:**

This course is a core course for the MBA program. The first part of this proposal is the addition of the ONLN delivery mode. As part of the MBA Program's efforts to increase flexibility in the delivery mode through which students can pursue a Schulich MBA, this course is offering a remote section for MBA students. The remote section will encompass a combination of asynchronous and remote synchronous learning with all assessments conducted remotely. That said, the course description and course learning outcomes remain identical to the remaining sections of the course. Any anticipated substantial changes to the assessments (e.g. replacement of a final exam with an alternative assessment) will be made so long as they contribute to the achievement of course learning outcomes and proceed through the proper governance approval process.

The second part of this proposal, independent of the first, reflects recent efforts to position the Schulich MBA program as a program that better integrates sustainability into its curriculum, something that is now explicit in the MBA Learning Outcomes. To this end, this proposal aims to amend the course description and learning outcomes to reflect this objective. The area has also taken this opportunity to update and modernize these course components.

## **10. Proposed Course Information:**

Existing Course Information (Change From):	Proposed Course Information (Change To):
<p><b>Title</b> <b>ECON 5100</b> The Economic Environment of Business</p> <p><b>Description:</b> This course provides managers with an overview of the economic environment <del>within which business must operate, and an understanding of some of the analytical tools which economists use to solve business, economic, environmental and social problems. Key concepts and ideas from microeconomics, macroeconomics, environmental and international economics are introduced. Topics relevant to real-world issues and problems are discussed.</del></p> <p><b>Course Learning Outcomes:</b></p> <ol style="list-style-type: none"> <li>1. Understand fundamental microeconomics concepts, tools and theories <del>required by well-educated manager, working for a domestic or international organization in a globalized economy.</del></li> <li>2. <del>Understand basic macroeconomic factors affecting the operating environment of firms and organizations in a domestic and international context.</del></li> <li>3. <del>Understand underlying economic incentives of organizations and implications for managers and stakeholders.</del></li> <li>4. <del>Understand potential problems associated with different market structures, the role of government, and their implications for managers and organizations.</del></li> <li>5. Be able to apply economic concepts and frameworks to analyze business models and develop strategies for the deployment of organizational resources.</li> <li>6. <del>Integrate economic environment analysis across disciplines.</del></li> </ol>	<p><b>Title</b> <b>ECON 5100 3.00</b> The Economic Environment of Business</p> <p><b>Description:</b> This course provides managers with an overview of the economic environment, including microeconomics, macroeconomics, and environmental and international economics, within which businesses operate. Students develop economic tools to address competitive, environmental, and social sustainability challenges. Real-world issues are explored to deepen practical understanding and application.</p> <p><b>Course Learning Outcomes:</b></p> <ol style="list-style-type: none"> <li>1. Understand essential microeconomics concepts, tools, and theories that equip managers in domestic or international organizations facing competitive and sustainability issues in a globalized economy.</li> <li>2. Reflect on tensions between individual or managerial decision-making and collective action to evaluate how these affect economic, sustainability, and societal goals.</li> <li>3. Recognize and analyze macroeconomic elements—such as inflation, unemployment, and fiscal/monetary policy—that influence the operating environment of firms across diverse contexts, with an emphasis on social welfare.</li> <li>4. Examine industry structures (e.g., perfect competition, monopoly, oligopoly) and assess their implications for innovation, sustainable resource development, and social welfare.</li> <li>5. Identify and evaluate the economic incentives driving organizational strategies and stakeholder engagement, regulations, and potential societal impacts.</li> <li>6. Understand how government intervention, public policy, and global governance frameworks can address market failures and support social initiatives such as poverty and environmental issues.</li> <li>7. Be able to apply economic concepts and frameworks to analyze business models and develop strategies for the deployment of organizational resources.</li> </ol>

11.

**Enrolment Notes:**

Not applicable

## 12. Consultation:

Consultation took place between the MBA Program Director and the Economics Area

### Originator:

Alex Coutts

Signature

February 25<sup>th</sup>, 2025

Date

Alex Coutts

Name

Economics

Area or Specialization

### Approvals:

#### Area or Specialization

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

Irene Henriques

Signature

March 12<sup>th</sup>, 2025

Date

Irene Henriques

Name

Economics

Area or Specialization

### Degree Program:

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

Mike Valente

Signature

March 13<sup>th</sup> 2025

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

April 3, 2025

Date

Kevin Tasa

Name of Committee Chair

Master Programs Committee

Committee

# Course Change Proposal Form

## Schulich School of Business

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

**1. Responsible Program:**

*Schulich MBA, Program*

**2. Responsible Unit:**

OMIS

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

OMIS 5110

**4. Credit Value:**

*1.50*

**5. Long Course Title:**

*Information Systems*

**6. Short Course Title:**

*Information Systems*

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

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

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

Fall 2025

## **9. Rationale:**

This course is a core course for the MBA program. As part of the MBA Program's efforts to increase flexibility in the delivery mode through which students can pursue a Schulich MBA, this course is offering a remote section for MBA students. The remote section will encompass a combination of asynchronous and remote synchronous learning with all assessments conducted remotely. That said, the course description and course learning outcomes remain identical to the remaining sections of the course. Any anticipated changes to the assessments (e.g. replacement of a final exam with an alternative assessment) will be made so long as they contribute to the achievement of course learning outcomes and proceed through the proper governance approval process.

## **10. Proposed Course Information:**

<b>Existing Course Information (Change From):</b>	<b>Proposed Course Information (Change To):</b>
<p><b>Title</b> <b>OMIS 5110</b> Information Systems</p> <p><b>Description:</b> The aim of this course is to create an understanding of key management issues with respect to the use of computer and information systems in modern business applications. Core technologies of hardware, software, databases, telecommunications, internet and the web, IT security, as well as emerging technologies such as AI and blockchain will be explored from a management perspective. As well as exploring technological, economic and organizational facets, important equity, environment, and social justice issues like gender and racial bias in AI, digital exclusion, e-waste, and carbon reporting are also examined.</p> <p><b>Course Learning Outcomes:</b> Information is perhaps the most important of all business resources, and the ability to manage it effectively on a global level is an essential organizational capability. Information systems are the tools that firms use to manage information, and it is critical for managers to understand how to use them. This course introduces you to key information systems concepts, issues and questions that will help you to accomplish this. The focus of the course is Managerial – little prior knowledge of information systems is required, and you certainly won't be doing any programming! It is assumed that you already possess the basic computer skills needed to use various office suite products (word processing, spreadsheet, e-mail, etc.) or will acquire these skills independently of this course. The objective of the course is to provide a basic knowledge set that will allow you to understand the most common information systems issues that exist in today's organizations, to ask critical questions, and participate in IT decision-making. In this course you will also reach, partially or fully, the following high-level learning outcomes via the group project and class readings and discussions.</p> <ol style="list-style-type: none"> <li>1. Critical Analysis &amp; Strategic Decision-Making: Incorporate knowledge of the theories, concepts, methods, and current research and practical issues in the functional disciplines of</li> </ol>	<p><b>Title</b></p> <p>No Change</p>

<p>management in order to make effective managerial decisions. Identify and analyze complex, cross-functional management problems using ambiguous qualitative and quantitative data. Derive innovative solutions and implementation plans for complex management problems that create sustainable value for organizational, governmental and other stakeholders.</p> <p>2. Professional Communication and Self-Awareness: Create and deliver effective and engaging oral presentations. Write effective and engaging business documents appropriate for the target audience.</p> <p>3. Leadership in a Transforming World: Proactively identify and respond to environmental, social, and governance (ESG) issues arising in business decision-making. Set and shape the agenda on making workplaces more diverse, equitable, and inclusive.</p> <p>4. Global Perspective: Evaluate issues and potential approaches to business decision-making in the global context.</p> <p>5. Technology Imperative: Collect and use data to inform decision making. Leverage the potential of technology to solve business issues. Leverage the potential of technology to address “wicked” societal problems.</p>	
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### 11. Enrolment Notes:

*Not applicable*

### 12. Consultation:

*Consultation took place between the OMIS Area Coordinator, the course instructors and the MBA Program Director*

### Originator:

Henry Kim

Signature

March 5<sup>th</sup>, 2025

Date

Henry Kim

Name

OMIS

Area or Specialization

### Approvals:

**Area or Specialization**

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

<u>Henry Kim</u>	<u>March 5<sup>th</sup>, 2025</u>
Signature	Date

<u>Henry Kim</u>	<u>OMIS</u>
Name	Area or Specialization

**Degree Program:**

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

<u>Mike Valente</u>	<u>March 5<sup>th</sup>, 2025</u>
Signature	Date

<u>Mike Valente</u>	<u>MBA Program</u>
Name of Program Director	Program

**Program Committee:**

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

<u>Kevin Tasa</u>	<u>April 3, 2025</u>
Signature	Date

<u>Kevin Tasa</u>	<u>Master Programs Committee</u>
Name of Committee Chair	Committee

# Course Change Proposal Form

## Schulich School of Business

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

**1. Responsible Program:**

*Schulich MBA, Program*

**2. Responsible Unit:**

OMIS

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

OMIS 5120

**4. Credit Value:**

*1.50*

**5. Long Course Title:**

*Quantitative Methods*

**6. Short Course Title:**

*Quantitative Methods*

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

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

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

Fall 2025

## **9. Rationale:**

The first part of this motion is to make small modifications to the course description and learning outcomes. Specifically, the course description has been condensed so that it is within the allowable 60 words. The learning outcomes have been edited so that they are presented in bullet point form, consistent with other courses. Outside of these formatting changes, no changes were made to the content of the course or the intended learning outcomes.

As part of the MBA Program's efforts to increase flexibility in the delivery mode through which students can pursue a Schulich MBA, the second part of this motion is to introduce an ONLN delivery mode. The remote section will encompass a combination of asynchronous and remote synchronous learning with all assessments conducted remotely. That said, the course description and course learning outcomes remain identical to the remaining sections of the course. Any anticipated changes to the assessments (e.g. replacement of a final exam with an alternative assessment) will be made so long as they contribute to the achievement of course learning outcomes and proceed through the proper governance approval process.

## 10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
<p><b>Title</b> <b>OMIS 5120</b> Quantitative Methods</p> <p><b>Description:</b> An introduction to the use of quantitative methods for business research, analysis, forecasting and decision making. The aim is to convey not only an understanding of methods, but also to give an appreciation of their use in addressing actual business problems impacting society, and to acquaint students with computer software necessary for implementing these methods. Problems revolving around economic, social, human, and environmental sustainability will be highlighted throughout the course, including ethical considerations around the collection, interpretation and use of statistical information.</p> <p><b>Course Learning Outcomes:</b> An introduction to the use of quantitative methods for business research, analysis, forecasting and decision making. The aim is to convey not only an understanding of methods, but also to give an appreciation of their use in addressing actual business problems, and to acquaint students with computer software necessary for implementing these methods. Problems revolving around economic, social, human, and environmental sustainability will be touched on throughout the course. This includes ethical considerations around the collection, interpretation, and use of statistical information. Managers are faced with a multitude of important decisions on a daily basis. The purpose of this course is to provide managers with the tools to be more effective decision makers through the use of insights generated through quantitative analysis. Data, when effectively organized, combined and compared, allows businesses to become more efficient and profitable, better understand their customers, price their products more effectively, and gain a competitive advantage. Ineffective use of data or use of inappropriate data can similarly lead to erroneous conclusions and bad decisions, ethical dilemmas, and sustainability concerns. In this course you will gain familiarity with structured approaches to working with data to generate improved results.</p>	<p><b>Title</b> <b>OMIS 5120 1.50</b> Quantitative Methods</p> <p><b>Description:</b> Students learn about quantitative methods used to conduct business research, analysis, forecasting and decision-making. Students are acquainted with computer software necessary for implementing quantitative methods. Problems of economic, social, human, and environmental sustainability will be highlighted throughout the course, including ethical considerations around the collection, interpretation and use of statistical information.</p> <p>By the end of this course, students will be able to:</p> <ol style="list-style-type: none"> <li>1. Understand how the use of data, when effectively organized, combined, and compared, allows business to become more efficient and profitable, better understand their customers, price their products more effectively, and gain competitive advantage</li> <li>2. Grasp insights generated through quantitative analysis to be more effective decision-makers</li> <li>3. Gain structured approaches to working with data to generate improved results.</li> <li>4. Demonstrate an understanding of quantitative methods and an appreciation of their use in addressing business and societal problems</li> <li>5. Understand the ethical considerations around the collection, interpretation, and use of statistical information</li> <li>6. Demonstrate application of quantitative methods to assist in resolving problems related to economic, social, human and environmental sustainability</li> <li>7. Understand how the ineffective use of data or use of inappropriate data can lead to erroneous conclusions and bad decisions, ethical dilemmas, and sustainability concerns.</li> </ol>

## 11. Enrolment Notes:

Not applicable

## 12. Consultation:

Consultation took place among the OMIS area coordinator, course instructors and the MBA Program Director

## Originator:

Henry Kim

Signature

March 5<sup>th</sup>, 2025

Date

Henry Kim

Name

OMIS

Area or Specialization

## Approvals:

### Area or Specialization

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

Henry Kim

Signature

March 5<sup>th</sup>, 2025

Date

Henry Kim

Name

OMIS

Area or Specialization

## Degree Program:

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

Mike Valente

Signature

March 25<sup>th</sup>, 2025

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

April 3, 2025

Date

Kevin Tasa

Name of Committee Chair

Master Programs Committee

Committee

# Course Change Proposal Form

## Schulich School of Business

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

**1. Responsible Program:**

*Schulich MBA, Program*

**2. Responsible Unit:**

MBA Program

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

MGMT 6150

**4. Credit Value:**

*3.00*

**5. Long Course Title:**

*Skills for Leadership*

**6. Short Course Title:**

*Skills for Leadership*

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

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

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

Fall 2025

## 9. Rationale:

In 2024, this course number was changed to 6150 from 5150 to accommodate a change to the program requirements of accelerated students that required them to take this course. Because accelerated students would be taking this course concurrent to SGMT 6000, which has 5150 as a prerequisite, we elected to change the rubric to overcome this constraint. However, recent changes to the MBA program have led to a change to the Strategic Management course from SGMT 6000 to SGMT 5200. This allows us to revert back to MGMT 5150, which is consistent with its role as a 1<sup>st</sup> year course.

## 10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
Title MGMT <del>6150</del> Skills for Leadership	Title MGMT <b>5150</b> 3.00 Skills for Leadership

## 11. Enrolment Notes:

*Not applicable*

## 12. Consultation:

*Consultation took place between Student Services, the ADA team and the MBA Program Director*

## Originator:

Mike Valente

Signature

March 5<sup>th</sup>, 2025

Date

Mike Valente

Name

MBA Program

Area or Specialization

## Approvals:

### Area or Specialization

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

Mike Valente

Signature

March 5<sup>th</sup>, 2025

Date

Mike Valente

Name

MBA Program

Area or Specialization

**Degree Program:**

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

Mike Valente

Signature

March 5<sup>th</sup>, 2025

Date

Mike Valente

Name of Program Director

MBA Program

Program

**Program Committee:**

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

Kevin Tasa

Signature

April 3, 2025

Date

Kevin Tasa

Name of Committee Chair

Master Programs Committee

Committee

# Course Change Proposal Form

## Schulich School of Business

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

**1. Responsible Program:**

*Schulich MBA, Program*

**2. Responsible Unit:**

SUST

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

SUST 5200

**4. Credit Value:**

*3.00*

**5. Long Course Title:**

*Business and Sustainability*

**6. Short Course Title:**

*Business and Sustainability*

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

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

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

Fall 2025

## 9. Rationale:

This course is now positioned at a point in the MBA program that requires students to have a minimum number of functions-based courses. This is important to distinguish program learning outcome 1 (foundational knowledge in functions) from program learning outcome 2 (organization and strategic level competence). Because we view these two learning outcomes as developmental, it is essential that students generate a sufficient level of knowledge in the functions before embarking on organizational and strategic level thinking. SUST 5200 is a key part of the Schulich MBA and is taught at the organizational and strategic level of analysis. As a result, this course will include a prerequisite of 15 5000 level course credits.

## 10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
<p><b>Title</b> <b>SUST 5200</b> <b>Business and Sustainability</b></p> <p><b>Description:</b> This course explores how organizations respond to increasing expectations to deliver sustainable performance at the economic, social and environmental level. Students grasp different ways in which companies can respond to growing pressures to adopt sustainability and study strategies of how companies can lead the way forward by developing practical solutions to some of society's most challenging problems.</p> <p><del>Prerequisites/Corequisites/Course Exclusions: Open to MBA students only. No prerequisites required. Note: Students who took SGMT 5800 should not be taking SUST 5200.</del></p>	<p><b>Title</b> <b>Title</b> <b>SUST 5200 3.00</b> <b>Business and Sustainability</b></p> <p><b>Description:</b> This course explores how organizations respond to increasing expectations to deliver sustainable performance at the economic, social and environmental level. Students grasp different ways in which companies can respond to growing pressures to adopt sustainability and study strategies of how companies can lead the way forward by developing practical solutions to some of society's most challenging problems.</p> <p>Prerequisites/Corequisites/Course Exclusions: Open to MBA students only. <b>Students are required to complete at least 15 credits of the 5000-series Required Foundations of Management Core Courses before enrolling in this course. Course exclusion: SGMT 5800 3.00</b></p>

## 11. Enrolment Notes:

*Not applicable*

## 12. Consultation:

Consultation took place with the sustainability area and the MBA Program Director

## Originator:

<u>Mike Valente</u>	<u>March 5<sup>th</sup>, 2025</u>
Signature	Date

<u>Mike Valente</u>	<u>MBA Program</u>
Name	Area or Specialization

**Approvals:****Area or Specialization**

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

<u>Geoff Kistruck</u>	<u>March 5<sup>th</sup>, 2025</u>
Signature	Date

<u>Geoff Kistruck</u>	<u>SUST</u>
Name	Area or Specialization

**Degree Program:**

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

<u>Mike Valente</u>	<u>March 5<sup>th</sup>, 2025</u>
Signature	Date

<u>Mike Valente</u>	<u>MBA Program</u>
Name of Program Director	Program

**Program Committee:**

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

*Kevin Tasa*

Signature

April 3, 2025

Date

Kevin Tasa

Name of Committee Chair

Master Programs Committee

Committee

## Schulich School of Business Memorandum

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To: Faculty Council, Schulich School of Business  
From: Melanie Cao, Director of the Master of Finance (MF for short) Program  
Date: February 13, 2025  
Re: Minor Modification to the Master of Finance Program

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### **Motion:**

#### **That Faculty Council approves the change to**

- A. That Faculty Council approves the removal of the two existing half courses MFIN 5700 1.5 Corporate Governance and Securities Law and MFIN 5900 1.5 Ethical Decision-making for Finance Professionals.
- B. That Faculty Council approves the replacement of the two half-credit courses with a new full credit course MFIN 5700 3.00 Consulting Study in Finance.

The above proposed changes will not entail a net reduction or increase in credit hours and thus the current 39 credit degree requirement remains intact. Please see the table in the following section for a summary of the changes.

### **Rationale:**

The MF program is a one-year program without an internship component. To enhance our students' competitiveness and marketability, we propose to introduce a new consulting project course. This course is a mini version of the 601 project with an emphasis on experiential learning.

The current MF curriculum is full. In order to create a room for this new course, we need to remove an existing 3-credit course work. We choose the two half-credit courses MFIN5700 1.5 Corporate Governance and Securities Law and MFIN5900 1.5 Ethical Decision-making for Finance Professionals for the following reasons: 1) it is very hard to find instructors for the two courses, especially for MFIN 5900. Our pay for a half-credit course is very low and no lawyer is willing to take the job. 2) The contents of the two courses are provided by the CFA Institute free of charge on its website and students can easily learn by themselves. Plus, some of these contents (e.g. corporate governance, security law and ethics) are covered by other MF courses (MFIN 5300 Investment Banking and MFIN 5600 Wealth Management).

# Minor Modification to Program/ Diploma/Certificate Academic Requirements Proposal Form

## Schulich School of Business

**Program:** Master of Finance

**Degree Designation** (e.g. PhD Degree, Undergraduate Certificate, Type 2 Graduate Diploma):  
Master of Finance

**Type of Modification:** Minor Modification to Program to replace MFIN 5700 1.50 Corporate Governance and Securities and MFIN 5900 1.50 Ethical Decision Making for Finance Professionals with MFIN 5700 3.00 Consulting Study in Finance

**Location** (*current campus and, if applicable, proposed*): Keele

**Effective Date:** Fall 2026

**Approval Date at Faculty Council:**

- 
1. Describe the proposed modifications to the program.

Proposed Change: remove the two existing half-credit courses MFIN 5700 1.50 Corporate Governance and Securities Law and MFIN 5900 1.50 Ethical Decision-making for Finance Professionals, replace with a new full credit course MFIN 5700 3.00 Consulting Study in Finance.

2. Provide a rationale for the proposed modifications.

Rationale: The MF program is a one-year program without an internship component. To enhance out students' competitiveness and marketability, we propose to introduce a new consulting project course. This course is a mini version of the 601 project with an emphasis on experiential learning.

The current MF curriculum is full. In order to create a room for this new course, we need to remove an existing full credit course work. We choose the two half-credit courses MFIN 5700 1.50 Corporate Governance and Securities Law and MFIN 5900 1.50 Ethical Decision-making for Finance Professionals for the following reasons: 1) it is very hard to find instructors for the two courses especially for MFIN 5900. Our pay for a half-credit course is very low and no lawyer is willing to take the job. 2) The contents of the two courses are provided by the CFA Institute free of charge on its website and students can easily learn by themselves. Plus, some of these contents (e.g. corporate governance, security law and ethics) are covered by other MF courses (MFIN 5300 Investment Banking and MFIN 5600 Institutional Wealth Management).

(Revised: December 17, 2024)

3. How will the proposed modification support the achievement of Program Learning Outcomes?

This proposal does not change any program requirements; hence it will not have any impact on the learning objective.

4. Describe how students currently enrolled in the program will be accommodated.

This proposal will not affect current students in the program since it will be effective in September 2026.

5. Describe any resource implications and how they are being addressed (e.g., through a reallocation of existing resources). If new/additional resources are required, provide a statement from the relevant Dean(s)/Principal confirming resources will be in place to implement the changes.

This proposal has no resource implications.

6. If relevant, summarize the consultation undertaken with relevant academic units, including commentary on the impact of the proposed changes on other programs. Provide individual statements from the relevant program(s) confirming consultation and their support.

The current MF program has been running successfully for 13 years. The main objective of the proposal is to enhance the existing curriculum by updating, delete/adding courses and by rearranging existing courses. The proposed changes will not affect other faculties and therefore do not necessitate external consultation. Within the Finance area, broad and multiple consultations were conducted among all colleagues, especially the founding director, the subsequent directors, the Dean, the Academic Associate Dean and Students Services staff.

## APPENDIX

### Attach a Side-by-Side Academic Calendar Copy Comparison

Ensure that deletions are indicated with strikethrough (e.g., ~~strikethrough~~) text and additions are made in a contrasting colour (e.g., **MGMT 1000**)

<b>Existing Program/ Diploma/Certificate Information (Change From):</b>	<b>Proposed Program/ Diploma/Certificate Information (Change To):</b>
<p>MASTER OF FINANCE</p> <p>As a result of increased marketplace competition, analysts and dealmakers alike require more focused knowledge and accreditation than ever before. Schulich's Master of Finance graduate program is designed to provide students with an intensive training in finance that is both practical and intellectually challenging. The course work is enhanced by regular research as well as professional seminars, taking advantage of the business community in Toronto and the Schulich alumni network.</p> <p>The Schulich Master of Finance is accredited as a CFA as well as FRM Program Partner and opens up career options ranging from investment banking, asset management, risk management, to private equity firms, hedge funds, consulting firms and government agencies. The program also serves as an excellent foundation for students considering a PhD in finance.</p> <p>For more information, please visit <a href="http://schulich.yorku.ca">http://schulich.yorku.ca</a> for more information.</p>	<p>MASTER OF FINANCE</p> <p>As a result of increased marketplace competition, analysts and dealmakers alike require more focused knowledge and accreditation than ever before. Schulich's Master of Finance graduate program is designed to provide students with an intensive training in finance that is both practical and intellectually challenging. The course work is enhanced by regular research as well as professional seminars, taking advantage of the business community in Toronto and the Schulich alumni network.</p> <p>The Schulich Master of Finance is accredited as a CFA as well as FRM Program Partner and opens up career options ranging from investment banking, asset management, risk management, to private equity firms, hedge funds, consulting firms and government agencies. The program also serves as an excellent foundation for students considering a PhD in finance.</p> <p>For more information, please visit <a href="http://schulich.yorku.ca">http://schulich.yorku.ca</a> for more information.</p>
<p>ADMISSION REQUIREMENTS</p> <p>Applicants normally should possess a four-year undergraduate degree from a recognized university with a minimum B+ average in the last two full years (or equivalent) of academic work. A candidate with a three-year degree may be considered for admission with a minimum of one year of work experience. Candidates should also possess a strong quantitative background. Applicants with undergraduate degrees from recognized institutions in technical disciplines such as mathematics, science, engineering, or economics, would automatically meet this</p>	<p>ADMISSION REQUIREMENTS</p> <p>Applicants normally should possess a four-year undergraduate degree from a recognized university with a minimum B+ average in the last two full years (or equivalent) of academic work. A candidate with a three-year degree may be considered for admission with a minimum of one year of work experience. Candidates should also possess a strong quantitative background. Applicants with undergraduate degrees from recognized institutions in technical disciplines such as mathematics, science, engineering, or economics, would automatically meet this</p>

*(Revised: December 17, 2024)*

<p>requirement. Applicants may also demonstrate the required level of quantitative skills via the completion of at least two courses at recognized institutions from these fields: calculus, statistics, economics, linear algebra, probability theory or other quantitative courses.</p> <p>Post degree work experience is recommended but not required.</p> <p>Applicants are required to take Graduate Management Admission Test (GMAT) or Graduate Record Examination (GRE) and obtain acceptable scores on all measures thereof. Candidates who have completed CFA Level 1 or higher, candidates with a CPA (Canada) designation, and graduates from the Schulich School of Business BBA program with a B+ or higher GPA in the last two years of the program are exempt from this requirement.</p> <p>Proof of English language proficiency if prior studies were not completed in English: Test of English as a Foreign Language (iBT): 100 with minimum component scores of 23 or International English Language Testing System: 7.0 overall with minimum component scores of 6.5. Strong applicants whose first language is not English and do not meet the above language requirements may be considered for admission with the condition of completion of the MBA/Specialized Master's Preparation Program offered by the York University English Language Institute.</p> <p>Completion of the online application including submission of essays, an up-to-date resume and two references.</p> <p><b>DEGREE REQUIREMENTS</b> Students must successfully complete 39 credits of course work, consisting of: 21 credits of core courses, and 18 credits of stream courses.</p>	<p>requirement. Applicants may also demonstrate the required level of quantitative skills via the completion of at least two courses at recognized institutions from these fields: calculus, statistics, economics, linear algebra, probability theory or other quantitative courses.</p> <p>Post degree work experience is recommended but not required.</p> <p>Applicants are required to take Graduate Management Admission Test (GMAT) or Graduate Record Examination (GRE) and obtain acceptable scores on all measures thereof. Candidates who have completed CFA Level 1 or higher, candidates with a CPA (Canada) designation, and graduates from the Schulich School of Business BBA program with a B+ or higher GPA in the last two years of the program are exempt from this requirement.</p> <p>Proof of English language proficiency if prior studies were not completed in English: Test of English as a Foreign Language (iBT): 100 with minimum component scores of 23 or International English Language Testing System: 7.0 overall with minimum component scores of 6.5. Strong applicants whose first language is not English and do not meet the above language requirements may be considered for admission with the condition of completion of the MBA/Specialized Master's Preparation Program offered by the York University English Language Institute.</p> <p>Completion of the online application including submission of essays, an up-to-date resume and two references.</p> <p><b>DEGREE REQUIREMENTS</b> Students must successfully complete 39 credits of course work, consisting of: 21 credits of core courses, and 18 credits of stream courses.</p>
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Existing Curriculum	Proposed Curriculum
<p>August: online pre-requisite</p> <p><b><u>MFIN 5100 0.00</u></b> Capital Markets</p> <p>Term 1 (Fall, 4 core courses)</p> <p><b><u>MFIN 5200 3.00</u></b> Financial Management and Valuation  <b><u>MFIN 5600 3.00</u></b> Institutional Wealth Management  <b><u>ACTG 6130 3.00</u></b> Intermediate Financial Accounting for Finance Majors  <b><u>FINE 6310 3.00</u></b> Applications of Data Science in Finance  <b><u>MFIN 5000 0.00</u></b> Research seminar series  <b><u>MFIN 5050 0.00</u></b> Professional seminar series</p>	<p>August: online pre-requisite</p> <p><b><u>MFIN 5100 0.00</u></b> Capital Markets</p> <p>Term 1 (Fall, 4 core courses)</p> <p><b><u>MFIN 5200 3.00</u></b> Financial Management and Valuation  <b><u>MFIN 5600 3.00</u></b> Institutional Wealth Management  <b><u>ACTG 6130 3.00</u></b> Intermediate Financial Accounting for Finance Majors  <b><u>FINE 6310 3.00</u></b> Applications of Data Science in Finance  <b><u>MFIN 5000 0.00</u></b> Research seminar series  <b><u>MFIN 5050 0.00</u></b> Professional seminar series</p>

<p>Term 2 (Winter, 1.5 core course and 3 specialization courses)</p> <p><b><u>MFIN 5700 1.50</u></b> Corporate Governance &amp; Security Law</p> <p><b><u>FINE 6800 3.00</u></b> Options, Futures &amp; Other Derivative Securities</p> <p><b><u>MFIN 5000 0.00</u></b> Research seminar series</p> <p><b><u>MFIN 5050 0.00</u></b> Professional seminar series</p> <p><u>Capital Market Stream</u></p> <p><b><u>MFIN 5300 3.00</u></b> Investment Banking</p> <p><b><u>MFIN 5400 3.00</u></b> Fixed Income Securities</p> <p><b><u>ENTR 6910 3.00</u></b> Venture Capital and Private Equity</p> <p><u>Financial Risk Management Stream</u></p> <p><b><u>MATH 6912 3.00</u></b> Machine Learning in Finance</p> <p><b><u>FNEN 6850 3.00</u></b> Fixed Income Securities</p> <p><b><u>MATH 6914 3.00</u></b> Data Driven Finance with Python</p>	<p>Term 2 (Winter, 1 core course and 3 specialization courses)</p> <p><del><b><u>MFIN 5700 1.50</u></b></del> Corporate Governance &amp; Security Law</p> <p><b><u>FINE 6800 3.00</u></b> Options, Futures &amp; Other Derivative Securities</p> <p><b><u>MFIN 5000 0.00</u></b> Research seminar series</p> <p><b><u>MFIN 5050 0.00</u></b> Professional seminar series</p> <p><u>Capital Market Stream</u></p> <p><b><u>MFIN 5300 3.00</u></b> Investment Banking</p> <p><b><u>MFIN 5400 3.00</u></b> Fixed Income Securities</p> <p><b><u>ENTR 6910 3.00</u></b> Venture Capital and Private Equity</p> <p><u>Financial Risk Management Stream</u></p> <p><b><u>MATH 6912 3.00</u></b> Machine Learning in Finance</p> <p><b><u>FNEN 6850 3.00</u></b> Fixed Income Securities</p> <p><b><u>MATH 6914 3.00</u></b> Data Driven Finance with Python</p>
<p>Term 3 (2.5 core courses and 2 specialization courses)</p> <p><b><u>MFIN 5900 1.50</u></b> Ethical Decision-making for Finance Professionals</p> <p><b><u>FINE 6600 3.00</u></b> Corporate Financial Analysis</p> <p><b><u>FINE 6280 3.00</u></b> FinTech: Digital Transformation of Financial Services</p> <p><u>Capital Market Stream</u></p> <p><b><u>MFIN 5800 3.00</u></b> Financial Risk Management</p> <p><b><u>MFIN 5500 3.00</u></b> Analysis of Structured Products using Python</p> <p><u>Financial Risk Management Stream</u></p> <p><b><u>FNEN 6820 3.00</u></b> Advanced Derivative Securities</p> <p><b><u>FNEN 6840 3.00</u></b> Enterprise-wide Financial Risk Management</p>	<p>Term 3 (3 core courses and 2 specialization courses)</p> <p><del><b><u>MFIN 5900 1.50</u></b></del> Ethical Decision-making for Finance Professionals</p> <p><b><u>FINE 6600 3.00</u></b> Corporate Financial Analysis</p> <p><b><u>FINE 6280 3.00</u></b> FinTech: Digital Transformation of Financial Services</p> <p><b><u>MFIN 5700 3.00</u></b> Consulting Study in Finance</p> <p><u>Capital Market Stream</u></p> <p><b><u>MFIN 5800 3.00</u></b> Financial Risk Management</p> <p><b><u>MFIN 5500 3.00</u></b> Analysis of Structured Products using Python</p> <p><u>Financial Risk Management Stream</u></p> <p><b><u>FNEN 6820 3.00</u></b> Advanced Derivative Securities</p> <p><b><u>FNEN 6840 3.00</u></b> Enterprise-wide Financial Risk Management</p>

Notes to the table:

- 1) MFIN 5700 1.50 Corporate Governance and Security Law and MINF 5900 1.50 Ethical Decision-making in Finance are in **red** font, indicating the removal of these two half-courses.
- 2) MFIN 5700 3.00 Consulting Study in Finance is in **blue** font, indicating that it is a new course.

(Revised: December 17, 2024)

## Schulich School of Business Memorandum

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To: Faculty Council, Schulich School of Business  
From: Melanie Cao, Director of the Financial Engineering (FinEng for short) Program  
Date: February 19, 2025  
Re: Minor Modification to the Financial Engineering Program

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### **Motion:**

1. That Faculty Council approves adding MFIN 5700 3.00 Consulting Study in Finance as an alternative to the internship or research paper requirement for the FinEng program. Moreover, MFIN 5700 3.00 Consulting Study in Finance should be counted as an elective towards the MBA degree requirement.

### **Rationale:**

1. The FinEng program requires students to either have internships or write research papers. In the past years, the job market has become extremely competitive for MBA students, very often students have trouble securing intern positions. Moreover, writing research papers does not necessarily increase students' marketable skills. To enhance students' competitiveness and marketability, we propose adding MFIN 5700 3.00 Consulting Study for Finance as an alternative to the internship or research paper requirement. Moreover, MFIN 5700 3.00 Consulting Study in Finance should be counted as an elective towards the MBA degree requirement.

## Change to Graduate Program/Graduate Diploma Academic Requirements Proposal Form

### Schulich School of Business

The following information is required for all proposals involving a minor modification to graduate program/graduate diploma 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. Graduate Program/Graduate Diploma:** Financial Engineering Diploma (Concurrent Diploma)

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

**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.**

Proposed Change: Add MFIN 5700 3.00 Consulting Study in Finance as an alternative to the internship or research paper requirement for the Financial Engineering program. Moreover, MFIN 5700 3.00 Consulting Study in Finance should be counted as an elective towards the MBA degree requirement.

Rationale: The Financial Engineering (FinEng) program requires students to either have internships or write research papers. In the past years, the job market has become extremely competitive for MBA students, very often students have trouble securing intern positions. Moreover, writing research papers does not necessarily increase students' marketable skills. To enhance students' competitiveness and marketability, we propose adding MFIN 5700 3.00 Consulting Study for Finance as an alternative to the internship or research paper requirement. Moreover, MFIN 5700 3.00 Consulting Study in Finance should be counted as an elective towards the MBA degree requirement.

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

This proposal does not change any program requirements; hence it will not have any impact on the learning objective.

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

Since the FinEng program is a joint program with the Department of Mathematics and Statistics, we

have consulted the Chair and the program director of the department. In turn, they consulted their faculty members, all of them support this proposal.

Please see the supporting document provided Professor Michael Chen, the FinEng program Director of the Department.

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

*This proposal has no resource implications.*

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

This proposal will not affect current students in the program since it will be effective in Fall 2026

**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 [FGS Academic Calendar](#).

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

Existing Graduate Program/Graduate Diploma Information (Change From):	Proposed Graduate Program/Graduate Diploma Information (Change To):
<p><i>Concurrent MBA Graduate Diploma in Financial Engineering</i></p> <p>The concurrent MBA Graduate Diploma in Financial Engineering is offered by the Schulich School of Business in collaboration with the Department of Mathematics and Statistics. It provides rigorous training in financial theory, methods of engineering, tools of mathematics and practice of programming.</p> <p>Applicants with strong quantitative backgrounds in economics, mathematics, statistics, computer science, science and engineering are suitable for this program. After completing the program, students will be equipped with the theoretical knowledge and specialized skills to develop and value new financial instruments and implement risk management schemes.</p> <p>Possible career paths include derivatives trading and valuation, risk management in banks, investment firms, brokerage houses, other financial institutions and consulting firm</p> <p><b>ELIGIBILITY:</b></p>	<p><i>Concurrent MBA Graduate Diploma in Financial Engineering</i></p> <p>The concurrent MBA Graduate Diploma in Financial Engineering is offered by the Schulich School of Business in collaboration with the Department of Mathematics and Statistics. It provides rigorous training in financial theory, methods of engineering, tools of mathematics and practice of programming.</p> <p>Applicants with strong quantitative backgrounds in economics, mathematics, statistics, computer science, science and engineering are suitable for this program. After completing the program, students will be equipped with the theoretical knowledge and specialized skills to develop and value new financial instruments and implement risk management schemes.</p> <p>Possible career paths include derivatives trading and valuation, risk management in banks, investment firms, brokerage houses, other financial institutions and consulting firm</p> <p><b>ELIGIBILITY:</b></p>

<p>Students must be approved by the Program Director based on:</p> <ul style="list-style-type: none"> <li>• undergraduate degree</li> <li>• successful completion of most of the following undergraduate courses: <ul style="list-style-type: none"> <li>- Calculus 1 and 2 – single and several variables</li> <li>- Linear Algebra</li> <li>- Foundations of Computer Science</li> <li>- Statistics and Probability</li> <li>- Microeconomics</li> </ul> </li> </ul> <p>Contact the Financial Engineering department to submit an Eligibility Questionnaire.</p> <p><b>GRADUATION REQUIREMENTS:</b></p> <ul style="list-style-type: none"> <li>• must be taken concurrently with a Schulich MBA*</li> <li>• the Graduate Diploma must be completed within one term of completing all MBA program requirements</li> <li>• <b>21.00 credits</b> of required courses below</li> <li>• an internship in a financial institution or an additional research paper</li> <li>• enrolment in Financial Engineering courses is with the permission of the Program Director</li> <li>• students working towards the Diploma in Financial Engineering may take a maximum of 9.00 credits outside Schulich</li> <li>* Students must satisfy both Graduate Diploma (above) and MBA requirements.</li> </ul> <p><b>REQUIRED COURSES:</b></p> <p>MATH 6914 3.00 Data Driven Finance with Python</p> <p>MATH 6912 3.00 Machine Learning in Finance</p> <p>FINE 6200 3.00 Investments</p> <p>FINE 6800 3.00 Options, Futures and Other Derivative Securities</p> <p>FNEN 6850 3.00 Fixed Income Securities</p> <p>FNEN 6820 3.00 Advanced Derivative Securities</p> <p>FNEN 6840 3.00 Enterprise-wide Financial Risk Management</p>	<p>Students must be approved by the Program Director based on:</p> <ul style="list-style-type: none"> <li>• undergraduate degree</li> <li>• successful completion of most of the following undergraduate courses: <ul style="list-style-type: none"> <li>- Calculus 1 and 2 – single and several variables</li> <li>- Linear Algebra</li> <li>- Foundations of Computer Science</li> <li>- Statistics and Probability</li> <li>- Microeconomics</li> </ul> </li> </ul> <p>Contact the Financial Engineering department to submit an Eligibility Questionnaire.</p> <p><b>GRADUATION REQUIREMENTS:</b></p> <ul style="list-style-type: none"> <li>• must be taken concurrently with a Schulich MBA*</li> <li>• the Graduate Diploma must be completed within one term of completing all MBA program requirements</li> <li>• <b>21.00 credits</b> of required courses below</li> <li>• an internship in a financial institution or an additional research paper, <b>or completing MFIN 5700 3.00 Consulting Study in Finance course</b></li> <li>• enrolment in Financial Engineering courses is with the permission of the Program Director</li> <li>• students working towards the Diploma in Financial Engineering may take a maximum of 9.00 credits outside Schulich</li> <li>* Students must satisfy both Graduate Diploma (above) and MBA requirements.</li> </ul> <p><b>REQUIRED COURSES:</b></p> <p>MATH 6914 3.00 Data Driven Finance with Python</p> <p>MATH 6912 3.00 Machine Learning in Finance</p> <p>FINE 6200 3.00 Investments</p> <p>FINE 6800 3.00 Options, Futures and Other Derivative Securities</p> <p>FNEN 6850 3.00 Fixed Income Securities</p> <p>FNEN 6820 3.00 Advanced Derivative Securities</p> <p>FNEN 6840 3.00 Enterprise-wide Financial Risk Management</p>
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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 Master of Finance (MF) Program*

**2. Responsible Unit:** *FINE*

**3. Subject Code (Rubric) and Course Number:** *MFIN 5700*

**4. Credit Value:** *3.00*

**5. Long Course Title:** Consulting Study in Finance

**6. Short Course Title:** Consulting Study in Finance

**7. Effective Term/Calendar Year:** *Summer 2027*

**8. Language of Instruction:** English

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

The Consulting Study in Finance (CSF) combines academic learning with practical experience. The project will require students to apply classroom knowledge to real world finance issues. During the CSF, students will use their finance knowledge to develop actionable recommendations for the financial institutions.

Prerequisites: all course in the first term offered by the MF program or equivalent MBA courses.

**10. Expanded Course Description:**

The Consulting Study in Finance (CSF) combines academic learning with practical experience. The project will require students to apply classroom knowledge to real world finance issues. During the CSF, students will use their finance knowledge to develop actionable recommendations for the financial institutions.

Prerequisites: all course in the first term offered by the MF program or equivalent MBA courses.

## 11. Course Learning Outcomes:

This course is designed to provide Master of Finance students the opportunity to obtain firsthand experience inside a financial institution, and to get a practitioner's perspective on the issues any financial institutions face. Projects vary widely in scope and nature, depending on the participating financial companies. Nevertheless, the focus is on finance issues, including portfolio management, risk management, application of AI in finance, or FinTech, and so on. Students must be willing and prepared to take on projects as assigned.

## 12. Rationale:

The MF program is a one-year program without an internship component. To enhance out students' competitiveness and marketability, we propose to introduce a new consulting project course. This course is a mini version of the 601 project with an emphasis on experiential learning.

## 13. Evaluation:

Reports	Group/ Individual	% of Final Grade	Due Date
Site Selection	Group	0	Due: Mid April, 2027
Statement of Work	Group	0	Due: End of April, 2027
Project Critical Path	Group	10	Third week in May, 2027
Project Plan Meeting, Presentation	Group	20	Last week in May, 2027
Status Report, Presentation	Group	15	Third week in June, 2027
Final Meeting, Presentation	Group	35	Third week July, 2027
Client Meeting and Presentation	Group		Last week in July, 2027
Reflective Journal, Individual	Individual	20	First week in August, 2027
	Total	100	

## 14. Integrated Courses:

*Not applicable*

## 15. Cross-listed Courses:

*Not applicable*

## **16. Enrolment Notes:**

The course is restricted to students enrolled in the MF program and the Financial Engineering program.

## **17. Faculty Resources:**

*Melanie Cao  
Gregory Pau*

## **18. Physical Resources:**

*This course does not require any additional/other physical 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 the subject area certifying that adequate library resources are available for the new course must be provided.*

# New Course Proposal Template

## (Part B - Schulich Use Only)

### 20. Instructors and Faculty Coordinator

**Initial instructor:**

*Melanie Cao*

**Alternative instructors:**

*Gregory Pau*

**Course coordinator:**

*Melanie Cao*

### 21. Specializations

**Primary area or specialization:**

*MF program*

**Secondary areas or specializations:**

### 22. Student Contact and Enrolment

**Contact hours: 72 hours**

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

**Maximum enrolment:**

*This is a core course; the maximum enrolment is 55.*

**Expected enrolment:**

*All students in the MF program should take this course. In the past few years, the enrolment for the program is between 50 – 55. The expected “steady-state” enrolment is 50 – 55.*

*SSB ADA’s office has the enrolment records for the past few years.*

*However, there is potential for the course to exceed the maximum enrolment in the future.*

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

- a. This course is carried out in the spirit of EDI. Students are formed groups with diverse background. Each member is offered with equal opportunity to participate and contribute to the consulting project. The final consulting report reflects each student's work and diverse perspective.*
- b. This course is a hand-on consulting study and students form groups to conduct research and perform financial analysis. Throughout the term, they work in groups and will learn and gain experience about equity, diversity, inclusion. For example, group formation will teach them how to deal with diversity and inclusion. Assigning work and managing group conflicts will make them deal with equity and inclusion and learn to show respects to each other.*

### **24. Human Participants Research**

*This course involves Human Participants Research. The course outline make reference to the Human Participants Research procedures and approval process and requires students to take the online training and obtain the certificate.*

### **25. Conditions for Approval**

*Not applicable.*

### **Originator:**

	February 13, 2025
Signature	Date
Melanie Cao	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.

Minerva Cernea	Experiential Learning
Steve Pulver	Marketing
Pauline Shum-Nolan	Finance
Gregory Pau	Finance
Ashwin Joshi	Marketing
Luke Zhu	ORGS

## Approvals

### Area or Specialization:

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

_____	February 13, 2025
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.

_____	February 13, 2025
Signature	Date
Melanie Cao	
_____	Master of Finance
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  
Signature

April 3, 2025  
Date

Kevin Tasa  
Name of Committee Chair

Master Program Committee  
Committee

# MFIN 5700 3.0 Consulting Study in Finance



## MFIN 5700 3.0 Consulting Study in Finance

Course Outline

SUMMER 2027

Instructor:

Professor Melanie Cao

SSB N220

[mcao@schulich.yorku.ca](mailto:mcao@schulich.yorku.ca)

Faculty Secretary:

Kaltum Osman

SSB N204A

416-736-5072

[kosman@schulich.yorku.ca](mailto:kosman@schulich.yorku.ca)

### Introduction:

**Professor Melanie Cao** joined Schulich in 2000 and is the director for the Master of Finance program. She has taught BBA, MBA, MF, FinEng and PhD courses in the past twenty-six years and been nominated for teaching award at Schulich. She is also serving as the Director for the MBA Financial Engineering Program. Her research interests include asset pricing, derivatives valuations, IPO, banking, and executive compensations. She worked as Senior Director for product development and Senior Financial Economist at the Chicago Mercantile Exchange and has done consulting work for various financial institutions.

### Description

The Consulting Study in Finance (CSF) combines academic learning with practical experience. The project will require students to apply classroom knowledge to real world finance issues. During the CSF, students will use the finance knowledge studied to develop actionable recommendations for the financial institutions.

**Prerequisites:** all courses in the first term offered by the MF program or equivalent MBA course (common core).

### Course Learning & Outcomes

This course is designed to provide Master of Finance students the opportunity to obtain firsthand experience inside a financial institution, and to get a practitioner's perspective on the issues any financial institutions face. Projects vary widely in scope and nature, depending on the participating financial companies. Nevertheless, the focus is on finance issues, including portfolio management, risk management, application of AI in finance, or FinTech, and so on. Students must be willing and prepared to take on projects as assigned.

This course requires students to apply and integrate the financial knowledge and analytical skills learned throughout the Master of Finance program to the end of providing practical and actionable recommendations to the participating financial company. Activities you can expect include, but are not limited to:

- Conducting macroeconomic and/or financial industry research to help the financial institution understand where it fits in the competitive environment.
- Working on a short-term project that is of importance to the financial institution, financially or operationally.
- Learning how to manage a consultant / client relationship.
- Creating high quality, succinct reports for the instructor and client.
- Working on a high-performance team and contributing to the team to deliver consistently excellent work that is always on time.

Through the course, students are expected to:

1. Learn to work with financial companies in a consulting relationship, scoping a problem, designing a research plan to address that problem, and delivering interim and final reports that meet client needs and ensure maximum buy-in.
2. Learn to implement a research plan and adapt it in real time, as data collection and analysis reveal new insights, and feedback processes fine tune understandings.
3. Learn to produce a compelling final report that clearly addresses the scope of the financial company's problem and effectively presents research and analysis to provide recommendations for the client's issue.

## **LEARNING IN THE REMOTE CLASSROOM**

This course will have an online component. All students are expected to have the following technology to participate in this course:

- Computer, High speed internet, Web camera, Microphone

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

Several platforms will be used in this course (e.g., Canvas, Zoom, etc.) through which students will interact with the course materials, the instructor, as well as with one another. Please review the technical specifications for

- Zoom: [Zoom Technical Specs](#)
- Canvas: [Canvas Technical Specs](#)

Please review the syllabus to determine how the class meets and how presentations will be conducted.

Zoom meetings will be used thorough the course. If you have privacy concerns about your data, provide only your first name or a nickname when you join a session. The system is configured in a way that all participants are automatically notified when a session is being recorded. In other words, a session cannot be recorded without you knowing about it. Copying of any Zoom recordings or other course materials for public or commercial distribution is strictly prohibited and may lead to copyright and/or privacy law violations.

Students who are unable to submit their work due to technical issues with their computer, network connection or learning tools should immediately email a copy of their work to their instructor, and then complete and email a Technical Issues Form (<https://schulich.instructure.com/courses/3499#technicalissues>) to their instructor.

## Deliverables at a Glance

Reports	Group/ Individual	% of Final Grade	Due Date
Site Selection	Group	0	Due: Mid April, 2027
Statement of Work	Group	0	Due: End of April, 2027
Project Critical Path	Group	10	Third week in May, 2027
Project Plan Meeting, Presentation	Group	20	Last week in May, 2027
Status Report, Presentation	Group	15	Third week in June, 2027
Final Meeting, Presentation	Group	35	Third week July, 2027
Client Meeting and Presentation	Group		Last week in July, 2027
Reflective Journal, Individual	Individual	20	First week in August, 2027
	Total	100	

## Course Material

There is no required textbook. Teaching notes and reading materials will be posted on the course Canvas site.

## Class-by-Class Syllabus

Course Schedule	Winter and Summer 2027	Notes
Overview of the Course Team Assignments Provided	First week in April, 2027	Course Review 6 or 7 students in a group
Lecture 1: time management, how to plan your research	Second week in April, 2027	
Lecture 2: How to manage the client/consultant relation	Third week in April, 2027	
Lecture 3: How to write a consulting report	Fourth week in April, 2027	
Financial Company selection and confirmation with Agreed statement of work	First week in May, 2027	Minerva will help to secure enough financial firms

Project Planning Meeting	Third week in May, 2027	Grade allocation form needed
Status Report Meeting	Third week in June, 2027	Grade allocation form needed
Final Meeting	Third week in July, 2027	Grade allocation form needed
Client Meeting, Presentation	Last week in July, 2027	
Individual reflective Journal	First week in August, 2027	

## Evaluation and Expectations of Written Assignments/Projects and Exam

### **1 Project Plan Meeting, Presentation (Team, 20%)**

The Project Plan will content details for addressing the specific issue or issues the financial company faces. This may include a preliminary assessment of the issue, how you plan to conduct research and analysis to address the issue.

Slides Deck with a Font Size no less than 16-point font in PowerPoint

Each Team should submit their Project Plan Deck on Canvas **3 DAYS PRIOR** to the meeting. Please include your names and student numbers on the front of the document itself.

You are required to deliver a well-rehearsed, professional presentation with an accompanying slide deck. This will be worth 20% of the course grade. You will also have to show evidence that the company has signed off on your project plan.

Finally, each group member must present during your team's presentation in each meeting. Please indicate who will present what on the cover of your presentation deck.

**All late submissions will lose 1/2 of a letter grade per day. Assignments that are more than one week overdue will not be accepted and will be assigned a grade of zero.**

A meeting summary is due to your instructor no more than 48 hours after the meeting. The meeting summary is ungraded.

### **2 Status, Presentation (Team, 15%)**

Over the weeks between the project plan meeting and the status report, students will conduct primary research with key stakeholders whose input is essential to addressing the project, and secondary research on project specific issues which will unfold as the project develops.

The purpose of the status meeting is to update your instructor on where you are at with your data collection and financial analysis. Your status update also requires a detailed work schedule, with roles and responsibilities provided to convince the instructor that you have thought through how you will finish your project on time.

Students will make a formal presentation of the status of the project vs. their project plan, including findings to date, and work remaining. This will be worth 20% of the course grade, and

should be delivered as a well-rehearsed, professional presentation with an accompanying slide deck.

Slides Deck with a Font Size no less than 16-point font in PowerPoint

Each Team should submit their Project Plan Deck on Canvas **3 DAYS PRIOR** to the meeting. Please include your names and student numbers on the front of the document itself.

You are required to deliver a well-rehearsed, professional presentation with an accompanying slide deck. This will be worth 20% of the course grade. You will also have to show evidence that the company has signed off on your project plan.

Finally, each group member must present during your team's presentation in each meeting. Please indicate who will present what on the cover of your presentation deck.

**All late submissions will lose 1/2 of a letter grade per day. Assignments that are more than one week overdue will not be accepted and will be assigned a grade of zero.**

As in the other 2 meetings, a meeting summary is due to your instructor no more than 48 hours after the meeting. The meeting summary is ungraded.

### **3 Final Meeting, and Presentation (Team, 35%)**

Final Slide Deck with a Font Size no less than 16-point font in PowerPoint

- Between mid-June and mid-July, students will complete any remaining research and write up the results of their study, incorporating all feedback they have received.
- They will make recommendations to address the company's issue for this project.
- We expect a well-rehearsed, professional presentation in addition to quality answers to the probing questions raised during the session.
- Groups will also submit their final slide deck, of no more than 30 pages, plus appendices on Canvas before the meeting.
- Importantly, there is no marking grid as each firm will face a different issue and demand a different solution.
- During the meeting, we will discuss whether the slide deck and presentation require changes before your meeting with your client.

#### **The Final Meeting Presentation**

- Students will present their final slide deck in 30 minutes and be prepared to answer questions for up to another 30 minutes.
- Each member of the team will present and participate in the Q&A session.
- You will incorporate instructor feedback (if required) into your report and/or presentation, and then present to your client.
- Signed Grade Allocation Form must be submitted with final assignment.

**All late submissions will lose 1/2 of a letter grade per day. Assignments that are more than one week overdue will not be accepted and will be assigned a grade of zero.**

A meeting summary is due to your instructor no more than 48 hours after the meeting. The meeting summary is ungraded.

#### **4     *Reflective Journal (Individual, 20%)***

You must answer each of the 7 questions by stating question (you can change the header a bit if you want) and then writing your answer and then moving on to the next one. Do NOT write this as an essay. You can use a 12-point font size, your answer should not exceed 3000 words.

Below are the 7 questions to be answered:

1. The expected learning outcomes you had of the project and whether those expectations have been met or changed as a result of the actual experience.
2. The most important skills you developed and the most critical knowledge you gained during your project experience.
3. The ways in which you applied or challenged your management theory and concepts with the project.
4. The functioning (or non-functioning) of the team. How did you deal with differences in opinion? How did you manage your meetings? What worked well and what did not? What are your key take-aways for future teamwork?
5. Your own objective assessment of your work, performance, and contributions to the project. In what areas did you excel? In what areas did you struggle? Did anything you learned about yourself surprise you?
6. A conflict or disappointment you experienced through your project and how you managed it?
7. What did you learn from the project experience that will change the way you approach your next work or project assignment?

The Reflective Journal should be based on the entire project experience. You are encouraged to reflect thoughtfully upon and respond to the specific organizational environment, professional responsibilities, and your own role in furthering the organization through the project. Consider the best and worst parts of the project, why you liked/not liked certain activities and duties, and what you learned from the activities.

**All late submissions will lose 1/2 of a letter grade per day. Assignments that are more than one week overdue will not be accepted and will be assigned a grade of zero.**

### **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/>) .

### **Visiting Campus**

As part of York's Community of Care Commitment, all members of the York community share in the responsibility of keeping others safe on campuses. In this class, as elsewhere on campus, students must comply with all University health and safety protocols, including:

- Following instructions in designated spaces, as they pertain to giving space to one another and/or protocols for entry to and exit from classrooms, instructional and other shared spaces (e.g., Libraries), when applicable.

**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.**

# MEMORANDUM

## York University Libraries

**To:** Melanie Cao, Director, Master of Finance, Schulich School of Business

**From:** Xuemei Li, Data Services Librarian, Open Scholarship Department

**Date:** March 21, 2025

**Subject:** Library Statement – MFIN 5700 3.0 Consulting Study in Finance

### Summary

York University Libraries (YUL) is well positioned to support this proposed course, which combines academic learning with practical experience. The project will require students to apply classroom knowledge to real world finance issues. Students will use their finance knowledge to develop actionable recommendations for financial institutions. 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 institutions, Financial services industry, Banks and banking, Investment analysis, Capital market, Portfolio management, Asset allocation, Financial engineering, Risk management, Social responsibility of business, Financial risk management, Finance – Decision making, Business consultants, Technological innovations, Fintech, Digital currency and Cryptocurrencies 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. Based on the librarian's review of course themes and 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.

**Key Business & Technology Publication Databases:**

- Proquest Business
- Business Source Complete
- ACM Digital Library
- IEEE Xplore
- Engineering Village
- Scholars Portal Journals
- JSTOR

**Key Company and Industry Research Databases:**

- Gartner Intraweb
- IBISWorld
- BMI (formerly FitchConnect)
- Marketline Advantage
- Passport
- Statista

**Advanced Financial Tools**

- S&P Capital IQ
- Bloomberg
- CRSP via WRDS
- Compustat via WRDS
- LSEG IBES via WRDS
- MorningStar Direct
- TSX CFMRC
- TSX e-review

**Newspaper Databases:**

- Factiva
- Nexis Uni
- Canadian Business & Current Affairs
- Canadian Major Dailies

**Business Videos & Streaming Media**

- Film on Demand
- Curio.ca
- Sage Knowledge
- NFB – National Film Board of Canada
- LinkedIn Learning

**eBook Platforms:**

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

# Services

## Library Instruction

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

### Relevant Guides & Online Tutorials of Interest:

- [Finance Research Guide](#)
- [Company Research Guide](#)
- [Industry Research Guide](#)
- [Step-by-Step Business Database Tutorials](#)
- [Information Technology Guide](#)
- [Business Citation Guide](#)

## 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](mailto:lashelp@yorku.ca) with questions.

## Schulich School of Business Memorandum

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To: Faculty Council, Schulich School of Business

From: Amin Mawani, Director of the Master of Health Industry Administration (MHIA) Program

Date: March 19, 2025

Re: Creation of a Part-Time Option in the MHIA Program

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### **Motion:**

That faculty council approves the motion to approve a part-time option for the Master of Health Industry Administration (MHIA) Program.

### **Rationale:**

*The Schulich Recruiting & Admissions team and the Master of Health Industry Management (MHIA) program team have received interest from high potential applicants who are unable to enroll in a full-time program due to employment commitments, suggesting demand for a part-time study option for this program.*

*The rationale for a Part-Time Study Option is to allow the MHIA program to accommodate strong applicants on a part-time basis within the existing (full-time) program curriculum and course sections.*

## Schulich School of Business Memorandum

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To: Faculty Council, Schulich School of Business

From: Amin Mawani, Director of the Master of Health Industry Administration (MHIA) Program

Date: March 20, 2025

Re: Adding an Elective to the Master of Health Industry Administration (MHIA) Program

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### **Motion:**

That faculty council approves the motion to add a 3.0 elective course in the Health Industry Administration (MHIA) Program.

### **Rationale:**

Adding a 3.0 elective will increase the program requirement from 34.5 credits to 37.5 credits. Adding an elective will give students the opportunity to gain breadth in disciplines that are adjacent to their core disciplinary focus in the program. This will contribute to strengthening their critical analysis and decision making skills (this being a key program learning objective).

# Detailed Minor Modification Proposal

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**Faculty:** Schulich School of Business

**Department:**

**Program:** Master of Health Industry Administration

**Degree Designation:** Master of Health Industry Administration

**Type of Modification:** Minor Modification to add a part-time study option and to add 3 credits of electives to the program requirements (for full-time and for part-time).

**Location:** Keele Campus

**Effective Date:** September 2026 (appears in recruiting materials September 2025)

**Approval Date at Faculty Council:**

---

**1.** Describe the proposed modifications to the program.

A. We propose to introduce a 24-month (6-term) part-time option to Schulich's existing Master of Health Administration (MHIA) degree program. This part-time version will offer the same content and learning outcomes of the existing full-time MHIA program, which runs over 12 months (3 terms). There are no changes to the learning outcomes (see Appendix for the Learning Outcomes for the Master of Health Administration Program). The change we are proposing is only to the mode of delivery of the existing curriculum.

B. Adding a 3.0 elective course to the program requirements.

**2.** Include as an appendix a side-by-side comparison of the existing and proposed program requirements as they will appear in the Undergraduate or Graduate Academic Calendar. Please indicate deletions as strikethrough text and additions as underlined text in a contrasting colour.

*See Appendix for comparison of existing Full-Time Program and proposed addition of Part-Time Study Option. For the part-time option, there are no other deletions or additions to the program requirements other than the number of terms in which the program is completed. Both versions now contain the additional 3 credit of electives requirement.*

**3.1** List the current and/or updated Program Learning Outcomes for the proposed modified program.<sup>1</sup>

*Current Program Learning Outcomes are provided below. There are no changes to Program Learning Outcomes for the proposed Part-Time Study Option.*

<b>Goal 1: Core Knowledge &amp; Understanding</b>
1.1 Define the main theories, concepts, and methods in the field of health industry management.
<b>Goal 2: Critical Analysis &amp; Decision-Making</b>
2.1 Identify and analyze a complex health industry problem using appropriate quantitative and qualitative research methods.
2.2 Devise a clear, cost-effective, innovative and actionable plans that deliver insights to satisfy stakeholder needs.
2.3 Know the tools of and analyze the trade-offs and possibilities involved in managing a health care project.
<b>Goal 3: Professional Communication</b>
3.1 Deliver a clear, effective and engaging oral presentation using appropriate technology.
3.2 Write a clear, effective and engaging business document appropriate for the target audience.
3.3 Apply appropriate strategies to work effectively in teams.
<b>Goal 4: Ethical Behaviour &amp; Social Responsibility</b>
4.1 Describe, analyze, and devise solutions for ethical and social issues that arise in health care management.
<b>Goal 5: Develop Professional Judgment for Trade-Offs in Healthcare Outcomes</b>
5.1 Identify a stakeholder management approach to generate sustainable value over the long-term.

**3.2** Provide a rationale for the proposed changes as articulated through the Program Learning Outcomes.

*A. The Schulich Recruiting & Admissions team and the Master of Health Industry Management (MHIA) program team have received interest from high potential applicants who are unable to enroll in a full-time program because of employment commitments, suggesting demand for a part-time study option for this program.*

---

<sup>1</sup> Ideally, a program would have 8-12 [Program Learning Outcomes \(PLOs\)](#) that reflect the program and demonstrate how the program meets Ontario's [Degree Level Expectations](#). Support for visioning, defining, and mapping your PLOs can be found in the [Office of the Vice Provost Academic](#).

*The rationale for a Part-Time Study Option is to allow the MHIA program to accommodate strong applicants on a part-time basis within the existing (full-time) program curriculum and course sections.*

*This change is expected to increase the total applicant pool for the program and help increase the quality and quantity of students enrolled in the MHIA program. It can do so at no expected additional costs/resources beyond a one-time change to program marketing materials and minor additional training and support of the additional part-time students by Student Services. Part-time students can be accommodated within the existing curriculum and daytime, evening, or weekend course sections available to existing full-time students. Part-time students will also not impose any additional burden on our Centre for Career Design since these students will already have jobs.*

*B. Adding an elective gives students the opportunity to explore areas of interest that are adjacent to the disciplinary requirements of the program. Adding an elective also serves to reinforce Learning Goal 2 (Critical Analysis & Decision Making). This goal is assessed summatively by the other program requirements.*

**3.3** How will the proposed modification support the achievement of Program Learning Outcomes?

*A. The addition of part-time students to existing MHIA course sections can help enhance achievement of Program Learning Outcomes by increasing the average amount and diversity of work experience among program students, enriching the quality of the learning experience through in-class discussion and group work.*

*B. See 3.2B*

**4.** Describe how students currently enrolled in the program will be accommodated.

*A. There is no foreseeable change or impact on full-time students currently enrolled in the program that result from the addition of a Part-Time Study Option. As such, there is no foreseeable need for new accommodations. Students who enter the full-time version of the program will have the flexibility to change to the part-time version in subsequent terms if they so decide (see Program Maps in the Appendix).*

*B. This requirement will start in September 2026 for the in-coming cohort, so no accommodation is needed for the students currently enrolled.*

**5.** Describe any resource implications and how they are being addressed (e.g., through a reallocation of existing resources). If new/additional resources are required, provide a statement from the relevant Dean(s)/Principal confirming resources will be in place to implement the changes.

*No new or additional resources will be required. The courses will be taught at Schulich's campus in existing evening and weekend course sections. Therefore, no additional physical resources will be required. There is no need for new or additional academic resources to support the Part-Time Study Option except to the extent that a larger student intake may lead to an additional cohort of course sections, and additional student support volume as provided by Student Services.*

*The program has more than doubled in size in the year since its launch (2023-24 enrollment: 45; 2024-25 enrollment: 95). Adding the Part-Time Study Option should help optimize enrollment levels and class section seat utilization.*

*The existing administrative support team in Student Services and the Schulich MHIA program administrative team is sufficient to support additional Part-Time Study Option students up to a maximum total (full and part time) program size of three cohorts (165 students).*

*Adding an elective is resource positive. It reduces the burden on Student Services and International Relations from having to implement a manual override process to accommodate students that wish to take an elective.*

6. If relevant, summarize the consultation undertaken with relevant academic units, including commentary on the impact of the proposed changes on other programs. Provide individual statements from the relevant program(s) confirming consultation and their support.

*Consultation regarding this proposed minor program modification of adding a Part-Time Study Option to the Schulich Master of Health Industry Administration program has been undertaken with the following individuals. Emailed statements confirming consultation and support are available upon request.*

- *Ashwin Joshi, Associate Dean, Programs at Schulich*
- *Kevin Tasa, Associate Dean, Academic at Schulich*
- *Giri Kanagaretnam, Associate Dean, Students at Schulich*
- *Kathryn Doyle, Director, Academic Affairs at Schulich*
- *Luba Pan, Director, Student & Enrolment Services at Schulich*
- *Lindsay Hillcoat, Executive Director, Student Services & Intl. Relations at Schulich*

7. For optional work-integrated learning elements (e.g., an optional internship course), please describe the consultation to ensure these elements are in line with best practice for experiential education and York's established other practices in this area. The [Office of the Vice Provost, Teaching and Learning](#) can provide further guidance.

*Not applicable*

## APPENDICES

### Appendix: Side-by-Side Academic Calendar Copy Comparison

*The proposed Part-Time Study Option simply distributes the existing Current Full-Time Program schedule of three terms (within one year) across six terms (two years). Students who take the Part-Time Study Option will attend existing daytime, evening, or weekend course sections within the Full-Time Program.*

*Figure 1: This is the structure of the Full Time Program as it presently exists.*

*Figure 2: This is the structure of the Revised Full-Time Program (addition of an elective + changing the names of the workshops)*

*Figure 3: This is the structure of the part-time version of the Revised Full-Time Program.*

Figure 1: Master of Health Industry Administration: Current Full-Time Program Structure (34.5 credits) Source: <https://schulich.yorku.ca/wp-content/uploads/2024/07/MHIA-Handbook-2024-25-V6.pdf>

Term 1 (Fall): 12 credits	Term 2 (Winter): 12 credits	Term 3 (Summer): 10.5 credits
MHIA 5000 1.50 Fall Workshop: Overview of Canadian Healthcare Industry	MHIA 5500 1.50 Winter Workshop in Leadership & Strategy in Canadian Healthcare	MHIA 6000 1.50 Summer Workshop in: Healthcare Systems and Public Policy
MHIA 5130 1.50 Preventive Healthcare	MHIA 5140 1.50 Digital Health	MHIA 6170 1.50 Performance Indicators in Healthcare
ACTG 5200 3.0 Financial Decisions for Managers	OMIS 5150 1.50 Analytics and Modelling for Healthcare	MHAI 6180 3.00 Entrepreneurship & Innovation in Healthcare
MKGT 5201 3.00 Marketing Management for Healthcare	MHIA 6120 3.00 Leadership and Healthcare Strategy	MHIA 6200 1.50 Public Policy for Healthcare
MSTM 5210 3.00 Design and Management of Organizational Processes	MHIA 6150 3.00 Economics of Healthcare	MHIA 6100 3.00 Strategy Consulting in Healthcare
	MHIA 6160 1.50 Quality and Value in Healthcare	

Figure 2: Master of Health Industry Administration: Revised Full -Time Program Structure (37.5 credits)

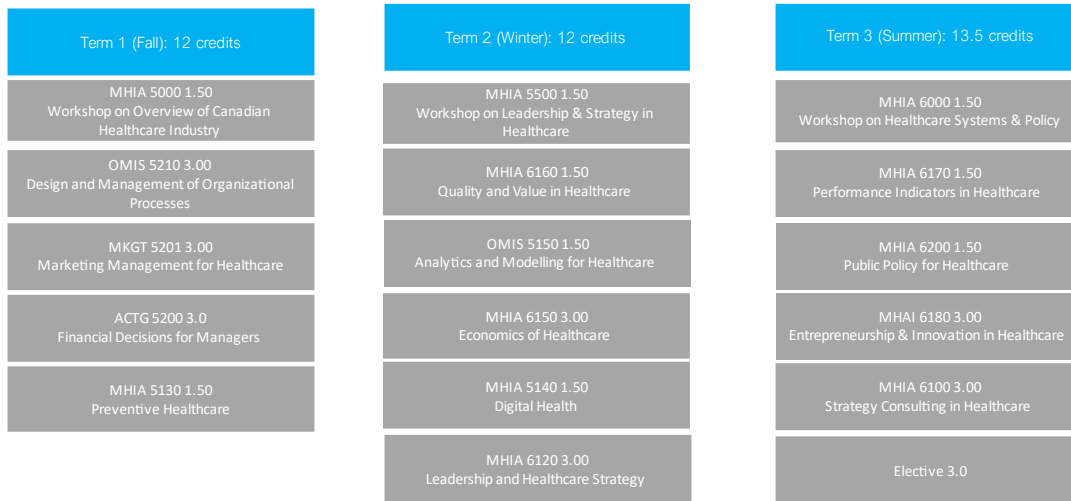
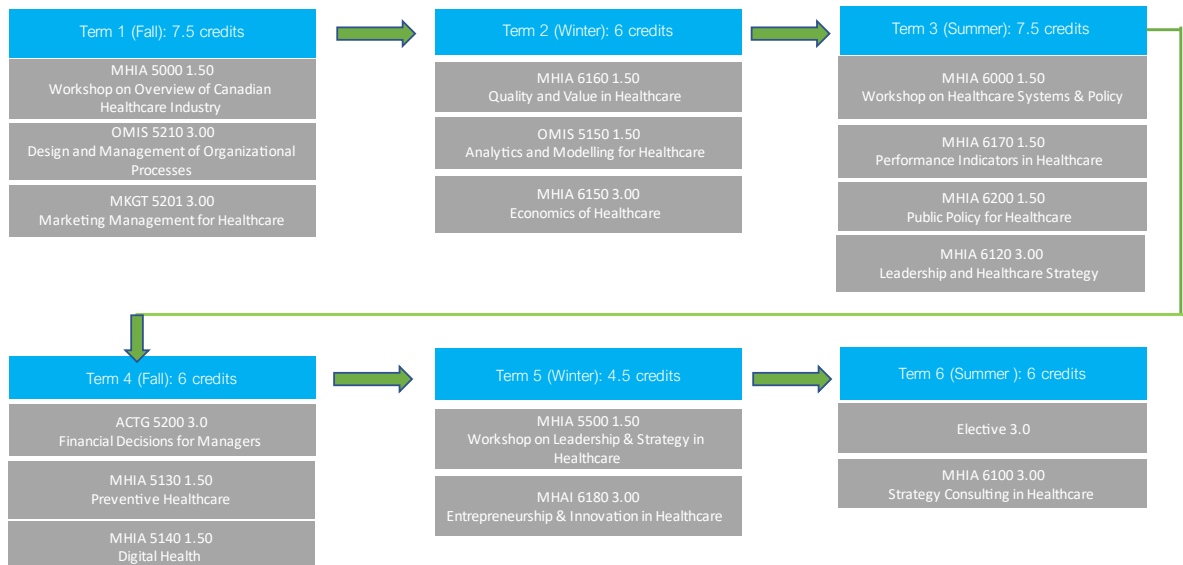


Figure 3: Master of Health Industry Administration: Part-Time Program Structure for Revised Full Time Program (37.5 credits)



## Appendix: Consultation and Support Letters

*Consultation regarding this proposed minor program modification of adding a Part-Time Study Option to the Schulich Master of Marketing program has been undertaken with the following individuals. Emailed statements confirming consultation and support are available upon request.*

- *Support letters/emails will be added here as they are received.*

## Schulich School of Business Memorandum

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To: Faculty Council, Schulich School of Business

From: Amin Mawani, Director of the Master of Health Industry Administration (MHIA) Program

Date: March 20, 2025

Re: Changing the Titles of the Workshops in the Program Handbook

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### **Motion:**

That faculty council approves the following name changes in the course titles in the Master of Health Industry Administration (MHIA) Program:

<b>Change Course Title From:</b>	<b>Change Course Title To:</b>
MHIA 5000 1.50 Fall Workshop: Overview of Canadian Healthcare Industry	MHIA 5000 1.50 Workshop on Overview of Canadian Healthcare Industry
MHIA 5500 1.50 Winter Workshop in Leadership & Strategy in Canadian Healthcare	MHIA 5500 1.50 Workshop on Leadership & Strategy in Healthcare
MHIA 6000 1.50 Summer Workshop in: Healthcare Systems and Public Policy	MHIA 6000 1.50 Workshop on Healthcare Systems & Policy

### **Rationale:**

These changes will allow for flexibility in the delivery of the workshops each year. Such change in titles would allow us to offer a Fall Workshop in the Summer (for example).

# 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 Health Industry Administration (MHIA)*

**2. Responsible Unit:**

*MHIA*

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

*MHIA 5000*

**4. Credit Value:**

*1.50*

**5. Long Course Title:** Fall Workshop: Overview of Canadian Healthcare Industry

**6. Short Course Title:** Workshop on Overview of Canadian Healthcare Industry

**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 2026*

**Rationale:** This will allow us to implement the change immediately.

*9. 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.*

We propose to drop the phrase "Fall Workshop" from the title. This change will allow for flexibility in the delivery of the workshop each year. *This change in title will allow us to offer the program in any term as opposed to being limited to one term (e.g., Fall).*

### 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):
<p><b>Title</b></p> <p><del>Fall Workshop: Overview of Canadian Healthcare Industry</del></p>	<p><b>Title</b></p> <p>Workshop on Overview of Canadian Healthcare Industry</p>

**11. Enrolment Notes:** *Course is limited to students in the MHIA Program*

**12. Consultation:** *Associate Dean Academic; Associate Dean Programs; Executive Director – Student Services and International Relations*

**Originator:**

  
\_\_\_\_\_  
Signature

March 24<sup>th</sup>, 2025  
\_\_\_\_\_  
Date

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Name

Area or Specialization

### Area or Specialization

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

Date \_\_\_\_\_

Area or Specialization

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

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Date

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Program

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

Signature

Date \_\_\_\_\_

## Master Programs Committee

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Name of Committee Chair

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Committee

## MHIA 5000 1.5 WORKSHOP ON OVERVIEW OF CANADIAN HEALTHCARE INDUSTRY

### COURSE OUTLINE

Fall 2024

Thursday September 5, 2024 11:30 AM – 5:30 PM in SSB N109

Friday September 6, 2024: 9:30 AM – 4:30 PM in SSB N109

<b>Instructor</b> Amin Mawani Office: S349, Seymour Schulich Building Email: <a href="mailto:amawani@schulich.yorku.ca">amawani@schulich.yorku.ca</a>	<b>Faculty Secretary</b> Clara Kan N305A Seymour Schulich Building <a href="mailto:ckan@schulich.yorku.ca">ckan@schulich.yorku.ca</a>
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### INSTRUCTOR

Professor Amin Mawani's research and teaching examines cost-benefit analysis of healthcare interventions and how employers can justify and play a role in the healthcare of Canadians.

### **Brief Description**

This 2-day workshop and orientation will offer an overview of the Canadian healthcare industry and an overview of the MHIA Program and its objectives. Guest speakers from public hospitals and pharmaceuticals will present their perspectives on the industry and the issues their sectors face. An overview of key library sources of healthcare-related information, analyses, and data will be provided by a healthcare librarian. Careers in healthcare and preparing for the health administration labour market will also be explored.

Students will develop familiarity and understanding of the various industry subsectors in Canada, and uncover the commonalities across the sub-sectors, as well as the choices they collectively may offer patients and the extent to which they offer synergies to other subsectors.

Linkages between health and economics will also be explored. Patients and healthcare providers exist in a world where resources – people, time, facilities, equipment, and knowledge – are scarce. Economic analysis concerns itself with choices since our ability to produce all desired output (efficacious therapies) is constrained. These choices are based on explicit and implicit criteria. Economic analysis seeks to identify criteria that may be useful in deciding among alternative uses of scarce resources.

*Prerequisites / Corequisites / Course Exclusions: None*

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Evaluation of Written Assignments/Projects .....	3
Calculation of Course Grade .....	3
General Academic Policies: Grading, Academic Honesty .....	3

## Course Learning Outcomes

Upon completion of this course, students should possess the following competencies:

### Develop Breadth

- Develop familiarity & understanding of the Canadian healthcare industry, terminology in healthcare, economics and business, and trends for the future.

### Group Communication

- Familiarize with their cohorts in the program and their diverse backgrounds, and how they view healthcare.

### Awareness of limits of knowledge

- Common sources of information and data including scholarly literature; reports on companies, industries, markets, and trends; financial data and analysis; and sources of healthcare-related data including the Canadian Institute for Health Information (CIHI), the Canadian Foundation for Healthcare Improvement (CFHI), the Canadian Community Health Survey, and Statistics Canada data tables.

### Professionalism

- Understand the different roles played by different decision-makers and their incentives.
- Ability to appreciate diverse viewpoints and assumptions to develop professional judgment.
- The Career Development Centre (CDC) and the Office of the Professional Development and Experiential Education at Schulich will discuss the power of networking and how to build a professional CV.

## Course Material

The presenters will share slides.

## Expectations for Student Preparation and Class Participation

This orientation session will be enhanced by student involvement and input. Those who take the opportunity to put their thoughts into words learn far more than those who simply listen passively. Students are encouraged to come up with their ideas about healthcare and issues that may need addressing. “Significant contributions” are those that add depth and challenge or redirect discussion rather than simply providing information.

## Description and Evaluation of Written Assignments/Projects

Students who do not attend at least 75% of the 2-day workshop sessions are required to submit a 750-word essay on one of the topics covered during the workshop.

## Calculation of Course Grade

Pass (P) or Fail (F) based on attendance and classroom contribution. Those who do not attend at least 75% of the sessions are required to submit a 750-word essay on one of the topics covered during the workshop.

## 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, 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 on the Schulich website:

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

*Accommodation.* For accommodation 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/>.

## Schedule

### Thursday September 5, 2024

- 11:30 AM – 1:00 PM: *Introductions and MHIA Orientation*
- 1:00 PM – 2:30 PM: Lunch
- 2:30 PM – 4:00 PM: **Professor Minerva Cernea**  
Associate Director, Head of the Office of Professional Development and Experiential Education  
*CV, Cover Letter, Networking and LinkedIn*
- 4:00 PM – 4:30 PM: Coffee
- 4:30 PM – 5:30 PM: **Amin Mawani**  
*Overview of the Canada Health Act & Canadian Healthcare*

### Friday September 6, 2024

- 9:30 AM – 10:00 AM: **Amin Mawani**  
*Introduction to Canadian Healthcare (continued)*
- 10:00 AM – 10:30 AM: Coffee
- 10:30 AM – 11:30 AM: **Sophie Bury**  
Business Librarian; Teaching & Learning Librarian  
Student Learning & Academic Success Department  
*Library Resources in Healthcare*
- 11:30 AM – 12:30 PM: **Rozmin Mediratta**  
Legal Counsel - Healthcare Insurance Reciprocal of Canada  
*Legal & Privacy Aspects of Healthcare*
- 12:30 PM – 2:00 PM: Lunch
- 2:00 – 3:00 PM: **Simone Harrington** – Vice President, Institute for Better Health & THP Solutions - Trillium Health Partners  
*Current Developments and Career Trends in Healthcare*
- 3:00 – 3:30 PM: Coffee
- 3:30 – 4:30 PM: **Kevin Wong** – Executive Director for Ontario at Novartis  
Develops partnership opportunities and innovative models that augment healthcare systems with key stakeholders across Novartis' therapeutic areas.

# 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 Health Industry Administration (MHIA)*

**2. Responsible Unit:**

*MHIA*

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

*MHIA 5500*

**4. Credit Value:**

*1.50*

**Long Course Title:** Winter Workshop in Leadership & Strategy in Canadian Healthcare

**5. Short Course Title:** Leadership & Strat.in Canadian Healthcare

**6. 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)

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

*Fall 2026*

**Rationale:** This will allow us to implement the change immediately.

*8. 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.*

We propose to drop the phrase "Winter" from the title. This change will allow for flexibility in the delivery of the workshop each year. *This change in title will allow us to offer the program in any term as opposed to being limited to one term (e.g., Winter).*

**9. 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).*

<b>Existing Course Information (Change From):</b>	<b>Proposed Course Information (Change To):</b>
<del>Winter Workshop in Leadership &amp; Strategy in Canadian Healthcare</del>	Workshop on Leadership & Strategy in Canadian Healthcare

**10. Enrolment Notes:** *Course is limited to students in the MHIA Program*

**11. Consultation:** *Associate Dean Academic; Associate Dean Programs; Executive Director – Student Services and International Relations*

**Originator:**

  
\_\_\_\_\_  
Signature

March 24<sup>th</sup>, 2025  
\_\_\_\_\_  
Date



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Name of Committee Chair

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Committee

## COURSE OUTLINE

Winter 2025

Thursday January 2, 2025 9:30 AM – 4:30 PM in SSB N109

Friday January 3, 2025: 9:30 AM – 4:30 PM in SSB N109

<b>Instructor</b> Amin Mawani Office: S349, Seymour Schulich Building amawani@schulich.yorku.ca	<b>Administrative Assistant</b> Clara Kan N305A Seymour Schulich Building <a href="mailto:ckan@schulich.yorku.ca">ckan@schulich.yorku.ca</a>
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## INSTRUCTOR

Professor Amin Mawani's research and teaching examines cost-benefit analysis of healthcare interventions and how employers can justify and play a role in the healthcare of Canadians.

## **Brief Description**

This 2-day workshop will examine the role of leadership in Change Management, the role of employers in healthcare of Canadians, data privacy / data integration and cybersecurity, the tradeoffs between quality and value, and other topics. We will examine the current debate of allowing Nurse Practitioners (NPs) to offer clinical services alongside General Practitioners (GPs) and their respective comparative advantage. This workshop will set the stage for Winter semester courses.

Students will develop familiarity and understanding the issues of patient privacy as they relate to cybersecurity and the role of data sharing and data integration in providing optimal clinical care.

Students will also become familiar with employers' perspectives on employee health, the cost of employee absenteeism and employee mental health, with an update on employee health benefits. We will also examine corporate reporting on investments in employee health as part of disclosure on ESG.

Linkages between health and economics will also be explored. Patients and healthcare providers exist in a world where resources – people, time, facilities, equipment, and knowledge – are scarce. Economic analysis concerns itself with choices since our ability to produce all desired output (efficacious therapies) is constrained. These choices are based on explicit and implicit criteria. Economic analysis seeks to identify criteria that may be useful in deciding among alternative uses of scarce resources.

*Prerequisites / Corequisites / Course Exclusions:* Completion of the Fall semester of MHIA Program.

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Calculation of Course Grade .....	3
General Academic Policies: Grading, Academic Honesty .....	3

## Course Learning Outcomes

Upon completion of this course, students should possess the following competencies:

### Develop Breadth

- Develop familiarity & understanding of the Canadian healthcare industry, terminology in healthcare, economics and business, and trends for the future.

### Group Communication

- Familiarize with their cohorts in the program and their diverse backgrounds, and how they view healthcare.

### Awareness of limits of knowledge

- Common sources of information and data including scholarly literature; reports on companies, industries, markets, and trends; financial data and analysis; and sources of healthcare-related data including the Canadian Institute for Health Information (CIHI), the Canadian Foundation for Healthcare Improvement (CFHI), the Canadian Community Health Survey, and Statistics Canada data tables.

### Professionalism

- Understand the different roles played by different decision-makers and their incentives.
- Ability to appreciate diverse viewpoints and assumptions to develop professional judgment.
- The Career Development Centre (CDC) and the Office of the Professional Development and Experiential Education at Schulich will discuss the power of networking and how to build a professional CV.

## Course Material

The presenters will share slides.

## Expectations for Student Preparation and Class Participation

This orientation session will be enhanced by student involvement and input. Those who take the opportunity to put their thoughts into words learn far more than those who simply listen passively. Students are encouraged to come up with their ideas about healthcare and issues that may need addressing. “Significant

contributions” are those that add depth and challenge or redirect discussion rather than simply providing information.

### Description and Evaluation of Written Assignments/Projects

Students who do not attend at least 75% of Day 1 are required to write a 650-word essay on the topic of *Change Management in Healthcare* by 11:59 PM on Saturday January 18, 2025. The essay should be written in an op-ed style (newspaper article) with no references.

Students who do not attend at least 75% of Day 2 are required to write a 650-word essay on the topic of *The Role of Employers in Healthcare* **or** on the topic of *General Practitioners vs Nurse Practitioners* by 11:59 PM on Saturday January 18, 2025. The essay should be written in an op-ed style (newspaper article) with no references.

### Calculation of Course Grade

Pass (P) or Fail (F) based on attendance and classroom contribution. Those who do not attend at least 75% of the sessions are required to submit **two** 650-word essays on the topics described above.

### 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, 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 on the Schulich website:

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

*Accommodation.* For accommodation 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/>.

## Schedule

### Thursday January 2, 2025

9:30 AM – 10:30 AM:	<b>Amin Mawani</b> <i>Feedback from Fall 2024 MHIA Program</i> <i>Update of Canada Health Act</i>
10:30 AM – 11:00 AM:	Coffee
11:00 AM – 12:30 PM:	<b>Professor Hilai Shefa</b> Organizational Studies - Schulich <i>Change Management in Healthcare</i>
12:30 PM – 1:30 PM:	Lunch (Pizza / Fruit slices)
1:30 PM – 2:30 PM:	<b>Shauna-Marie Kerr</b> Centre for Career Design at Schulich
2:30 PM – 3:00 PM:	Coffee
3:00 PM – 4:30 PM	<b>Amin Mawani</b> <i>Leadership; Chronic Illnesses; Privacy &amp; Cybersecurity</i>

### Friday January 3, 2025

9:30 AM – 10:30 AM:	<b>Amin Mawani</b> <i>Employers' Perspectives on Employee Well-Being</i> <i>Cost of Absenteeism &amp; Employee Mental Health (Employee Health Benefits)</i> <i>Corporate Reporting on Employee Health as part of ESG</i>
10:30 AM – 11:00 AM:	Coffee
11:00 AM – 12:30 PM:	<b>Minerva Cernea</b> Associate Director, Head of the Office of Professional Development and Experiential Education <i>Job Interviews and Elevator Pitch</i>
12:30 PM – 1:30 PM:	Lunch
1:30 PM – 3:00 PM:	<b>Amin Mawani</b> <i>Role of Nurse Practitioners: GPs vs NPs. Comparative Advantage</i> <i>Role of Pharmacies; Incentives; Healthcare as an Investment</i>
3:00 – 3:30 PM:	<b>Coffee</b>
3:30 – 4:30 PM:	<b>Amin Mawani</b> <i>Shared Value Creation; Leveraging Data to Improve Clinical Care</i>

# 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 Health Industry Administration (MHIA)*

**2. Responsible Unit:**

*MHIA*

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

*MHIA 6000*

**4. Credit Value:**

*1.50*

**Long Course Title:** Summer Workshop: in Healthcare Systems and Public Policy

**5. Short Course Title:** Healthcare Systems and Public Policy

**6. 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)

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

*Fall 2026*

**Rationale:** This will allow us to implement the change immediately.

*8. 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.*

We propose to drop the phrase "Summer" from the title. This change will allow for flexibility in the delivery of the workshop each year. *This change in title will allow us to offer the program in any term as opposed to being limited to one term (e.g., Summer).*

**9. 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).*

<b>Existing Course Information (Change From):</b>	<b>Proposed Course Information (Change To):</b>
<p><del>Summer Workshop: in Healthcare Systems and Public Policy</del></p>	<p>Workshop on Healthcare Systems and Policy</p>

**10. Enrolment Notes:** *Course is limited to students in the MHIA Program*

**11. Consultation:** *Associate Dean Academic; Associate Dean Programs; Executive Director – Student Services and International Relations*

**Originator:**

  
\_\_\_\_\_  
Signature

March 24<sup>th</sup>, 2025  
\_\_\_\_\_  
Date

Amin Mawani

Area or Specialization

### Area or Specialization

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

Signature

Date

Name

Area or Specialization

**Degree Program:**

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

Signature

Date \_\_\_\_\_

Name of Program Director

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Program

**Program Committee:**

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

*Kevin Tasa*

Signature

April 3, 2025

Date \_\_\_\_\_

Kevin Tasa

## Master Programs Committee

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Name of Committee Chair

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Committee

## COURSE OUTLINE

Summer 2025

Monday May 5, 2025 9:30 AM – 4:30 PM in SSB N109

Tuesday May 6, 2025: 9:30 AM – 4:30 PM in SSB N109

<b>Instructor</b> Amin Mawani Office: S349, Seymour Schulich Building amawani@schulich.yorku.ca	<b>Administrative Assistant</b> Clara Kan N305A Seymour Schulich Building <a href="mailto:ckan@schulich.yorku.ca">ckan@schulich.yorku.ca</a>
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## INSTRUCTOR

Professor Amin Mawani's research and teaching examines cost-benefit analysis of healthcare interventions and how employers can justify and play a role in the healthcare of Canadians.

## **Brief Description**

This 2-day workshop will examine issues in public policy and performance metrics in healthcare. Other topics will include the role of employers in healthcare of Canadians, how employers quantify the benefits of a healthier and more productive workforce, social determinants of health, data privacy / data integration and cybersecurity, the tradeoffs between quality and value, plus a guest lecture in Change Management. This workshop will chart the healthcare administration journey so far and set the stage for courses offered in the Summer.

*Prerequisites / Corequisites / Course Exclusions:* Completion of the Winter semester of MHIA Program.

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Evaluation of Written Assignments/Projects .....	3
Calculation of Course Grade .....	3
General Academic Policies: Grading, Academic Honesty .....	3

## Course Learning Outcomes

Upon completion of this course, students should possess the following competencies:

### Develop Breadth

- Develop familiarity & understanding of the Canadian healthcare industry, terminology in healthcare, economics and business, and trends for the future.

### Group Communication

- Familiarize with their cohorts in the program and their diverse backgrounds, and how they view healthcare.

### Awareness of limits of knowledge

- Common sources of information and data including scholarly literature; reports on companies, industries, markets, and trends; financial data and analysis; and sources of healthcare-related data including the Canadian Institute for Health Information (CIHI), the Canadian Foundation for Healthcare Improvement (CFHI), the Canadian Community Health Survey, and Statistics Canada data tables.

### Professionalism

- Understand the different roles played by different decision-makers and their incentives.
- Ability to appreciate diverse viewpoints and assumptions to develop professional judgment.
- The Career Development Centre (CDC) and the Office of the Professional Development and Experiential Education at Schulich will discuss the power of networking and how to build a professional CV.

## Course Material

The presenters will share slides.

## Expectations for Student Preparation and Class Participation

This orientation session will be enhanced by student involvement and input. Those who take the opportunity to put their thoughts into words learn far more than those who simply listen passively. Students are encouraged to come up with their ideas about healthcare and issues that may need addressing. “Significant

contributions” are those that add depth and challenge or redirect discussion rather than simply providing information.

### Description and Evaluation of Written Assignments/Projects

Students who do not attend at least 75% of Day 1 are required to write a 750-word submission on a case study to be assigned closer to time. This will be due by 11:59 PM on Saturday May 17, 2025. AI and Chat GPT assistance is not permissible.

Students who do not attend at least 75% of Day 2 are required to write a 750-word essay on one of the topics covered in the Workshop. This will be due by 11:59 PM on Saturday May 17, 2025. The essay should be written in an op-ed style (newspaper article) with no references. AI and Chat GPT assistance is not allowed.

### Calculation of Course Grade

Pass (P) or Fail (F) based on attendance and classroom contribution. Those who do not attend at least 75% of the sessions are required to submit **two** 750-word essays on the topics described above.

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

*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/>

*Accommodation.* For accommodation 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/>.

## Schedule

### Monday May 5, 2025

9:30 AM – 10:30 AM:	<b>Amin Mawani</b> <i>Feedback from Winter 2025 semester</i> <i>Additional Insights from Preventive Healthcare</i>
10:30 AM – 11:00 AM:	Coffee
11:00 AM – 12:30 PM:	<b>Professor Hilai Shefa</b> Organizational Studies - Schulich <i>Change Management in Healthcare</i>
12:30 PM – 1:30 PM:	Lunch
1:30 PM – 2:30 PM:	<b>Guest Speaker</b> <i>Additional Insights on Quality vs Value in Healthcare</i>
2:30 PM – 3:00 PM:	Coffee
3:00 PM – 4:30 PM	<b>Amin Mawani</b> <i>Quantifying the benefits of healthcare on employee productivity</i> <i>Guest Speaker on Calculating ROI on Employee Wellness programs</i>

### Tuesday May 6, 2025

9:30 AM – 10:30 AM:	<b>Amin Mawani</b> <i>Corporate Reporting on Employee Health as part of ESG</i>
10:30 AM – 11:00 AM:	Coffee
11:00 AM – 12:30 PM:	<b>Minerva Cernea</b> Associate Director, Head of the Office of Professional Development and Experiential Education
12:30 PM – 1:30 PM:	Lunch
1:30 PM – 3:00 PM:	<b>Tai Huynh (<i>The Local</i>)</b> <i>Social Determinants of Health</i> <i>Access to Healthcare in the GTA</i>
3:00 – 3:30 PM:	<b>Coffee</b>
3:30 – 4:30 PM:	<b>Amin Mawani</b> <i>Shared Value Creation; Leveraging Data to Improve Clinical Care</i>

## Schulich School of Business Memorandum

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To: Faculty Council, Schulich School of Business  
From: Grant Packard, Director of the Master of Marketing (MMKG) Program  
Date: March 19, 2025  
Re: Creation of a Part-Time Option in the MMKG Program

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### **Motion:**

That faculty council approves the motion to approve a part-time option for the Master of Marketing (MMKG) Program.

### **Rationale:**

*The Schulich Recruiting & Admissions team and the Master of Marketing program team have received interest from high potential applicants who are unable to apply to or participate in the program without simultaneously holding full or part-time employment, suggesting demand for a part-time study option for this program.*

*The rationale for a Part-Time Study Option is to allow the MMKG program to accommodate strong applicants on a part-time basis within the existing (full-time) program curriculum and course sections.*

# Detailed Minor Modification Proposal

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**Faculty:** Schulich School of Business

**Department:**

**Program:** Master of Marketing

**Degree Designation:** MMKG

**Type of Modification:** Addition of a part-time study option

**Location:** Keele Campus

**Effective Date:** September 2026 (appears in recruiting materials September 2025)

**Approval Date at Faculty Council:**

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1. Describe the proposed modifications to the program.

*We propose introducing a 24 month (six term) part-time option to Schulich's existing Master of Marketing (MMKG) degree program. The part-time option will offer the same content and learning outcomes as the existing full-time MMKG program, which runs over 12 months (three terms). There would be no changes to the learning outcomes for the part-time option (see Appendix for the Learning Outcomes for the Master of Marketing program). The change we are proposing is only to provide a second option for delivery timing of the existing curriculum.*

2. Include as an appendix a side-by-side comparison of the existing and proposed program requirements as they will appear in the Undergraduate or Graduate Academic Calendar. Please indicate deletions as strikethrough text and additions as underlined text in a contrasting colour.

*See Appendix for comparison of existing Full-Time Program and proposed addition of Part-Time Study Option. There are no deletions or additions to the program requirements other than the number of terms in which the program is completed.*

**3.1** List the current and/or updated Program Learning Outcomes for the proposed modified program.<sup>1</sup>

*Current Program Learning Outcomes are provided below. There are no changes to Program Learning Outcomes for the proposed Part-Time Study Option.*

<b>Goal 1: Core Business Knowledge &amp; Understanding</b>
1.1 Define the main theories, concepts, and methods in the field of marketing.
<b>Goal 2: Critical Analysis &amp; Decision-Making</b>
2.1 Identify and analyze a complex marketing problem using appropriate quantitative and qualitative research methods.
2.2 Devise a clear, cost-effective, innovative and actionable marketing plan that delivers consumer insights to satisfy the needs of an organization.
2.3 Know the tools of and analyze the trade-offs and possibilities involved in managing a project.
<b>Goal 3: Professional Communication</b>
3.1 Deliver a clear, effective and engaging oral presentation using appropriate technology.
3.2 Write a clear, effective and engaging business document appropriate for the target audience.
3.3 Apply appropriate strategies to work effectively in teams.
<b>Goal 4: Ethics &amp; Social Responsibility</b>
4.1 Describe, analyze, and devise solutions for ethical and social issues that arise in marketing.

**3.2** Provide a rationale for the proposed changes as articulated through the Program Learning Outcomes.

*The Schulich Recruiting & Admissions team and the Master of Marketing (MMKG) program team have received interest from high potential applicants who are unable to apply to or participate in the program without simultaneously holding full or part-time employment, suggesting demand for a part-time study option for this program.*

*The rationale for a Part-Time Study Option is to allow the MMKG program to accommodate strong applicants on a part-time basis within the existing (full-time) program curriculum and course sections.*

*This change is expected to increase the total applicant pool for the program, and help increase the quality and quantity of students enrolled in the MMKG program. It can do so*

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<sup>1</sup> Ideally, a program would have 8-12 [Program Learning Outcomes \(PLOs\)](#) that reflect the program and demonstrate how the program meets Ontario's [Degree Level Expectations](#). Support for visioning, defining, and mapping your PLOs can be found in the [Office of the Vice Provost Academic](#).

*at no expected additional costs/resources beyond a one-time change to program marketing materials and minor additional training and support of the additional part-time students by Student Services. Part-time students can be accommodated within the existing curriculum and daytime, evening, or weekend course sections available to existing full-time students.*

**3.3** How will the proposed modification support the achievement of Program Learning Outcomes?

*The addition of part-time students to existing MMKG course sections can help enhance achievement of Program Learning Outcomes by increasing the average amount and diversity of work experience among program students, enriching the quality of the learning experience through in-class discussion and group work.*

**4.** Describe how students currently enrolled in the program will be accommodated.

*There is no foreseeable change or impact on full-time students currently enrolled in the program that result from the addition of a Part-Time Study Option. As such, there is no foreseeable need for new accommodations. The viability of allowing an interested full-time student to transition to the part-time study option (or vice versa) after partial curriculum completion will be assessed on a case-by-case basis.*

**5.** Describe any resource implications and how they are being addressed (e.g., through a reallocation of existing resources). If new/additional resources are required, provide a statement from the relevant Dean(s)/Principal confirming resources will be in place to implement the changes.

*No new or additional resources will be required. The courses will be taught at Schulich's campus in existing evening and weekend course sections. Therefore, no additional physical resources will be required. There is no need for new or additional academic resources to support the Part-Time Study Option except to the extent that a larger student intake may lead to an additional cohort of course sections, and additional student support volume as provided by Student Services.*

*In recent years (2021-2024) the MMKG program has seen a range of approximately 100-120 full-time students per year. With a maximum core class size of 55 students, this has meant the operation of two to three cohorts (class sections). Adding the Part-Time Study Option should help optimize enrollment levels and class section seat utilization.*

*The existing administrative support team in Student Services and the Schulich Marketing Area administrative team is sufficient to support additional Part-Time Study Option students up to a maximum total (full and part time) program size of three cohorts (165 students).*

6. If relevant, summarize the consultation undertaken with relevant academic units, including commentary on the impact of the proposed changes on other programs. Provide individual statements from the relevant program(s) confirming consultation and their support.

*Consultation regarding this proposed minor program modification of adding a Part-Time Study Option to the Schulich Master of Marketing program has been undertaken with the following individuals. Emailed statements confirming consultation and support are available upon request.*

- Emily Rush, Director, Academic Programs & Policy at York
- Ashwin Joshi, Associate Dean, Programs at Schulich
- Kevin Tasa, Associate Dean, Academic at Schulich
- Kiridaran (Giri) Kanagaretnam, Associate Dean, Students at Schulich
- Mike Valente, Director, MBA Program at Schulich
- Luke Zhu, Director, Master of Management Program at Schulich
- Lindsay Hillcoat, Executive Director, Student Services & Intl. Relations at Schulich
- Luba Pan, Director, Student & Enrolment Services at Schulich
- Kathryn Doyle, Director, Academic Affairs at Schulich
- Susan Calahan, Assistant Director, Recruitment and Admissions at Schulich
- David Rice, Area Coordinator, Marketing at Schulich

7. For optional work-integrated learning elements (e.g., an optional internship course), please describe the consultation to ensure these elements are in line with best practice for experiential education and York's established other practices in this area. The [Office of the Vice Provost, Teaching and Learning](#) can provide further guidance.

*Not applicable*

## APPENDICES

### Appendix: Side-by-Side Academic Calendar Copy Comparison

*There are no deletions or additions to the program as a result of this proposal. The proposed Part-Time Study Option simply distributes the existing Current Full-Time Program schedule of three terms (within one year) across six terms (two years). Students who take the Part-Time Study Option will attend existing daytime, evening, or weekend course sections within the Full-Time Program.*

*In consultation with the Executive Director of Recruiting & Admissions and the Director of Student Services, we also believe that the Part-Time Study Option can support an option whereby newly admitted students with a Bachelor of Business Administration or Bachelor of Commerce degree (or similar equivalent) who have completed an introductory marketing course equivalent to MKTG 5200 Marketing Management and an introductory accounting or finance course equivalent to ACTG 5200 Financial Decisions for Managers can be granted advance standing such that they would begin the program in the Year 1 Winter Term. To achieve this, the MKTG 6000 level elective slated for the Year 1 Fall Term could be taken by the advanced standing student in a subsequent term of their choosing.*

#### Current Full-Time Program

Fall Term	Winter Term	Summer Term
MKTG 5200 Marketing Management	MKTG 6370 Marketing Analytics	MKTG 6000 Field Project
MKTG 6050 Marketing Research	MKTG 6550 Brand Management	MKTG 6820 Marketing Dynamics
MKTG 6100 Strategic Mktg Comms	MKTG 6560 Digital Marketing	MKTG 6000 ELECTIVE (Work Placement option)
MKTG 6000 ELECTIVE (ACTG 5200 for non-bus)	MKTG 6000 ELECTIVE	
MGMT 5190 (1.5) Professional Dev Hive 1	MGMT 5290 (1.5) Professional Dev Hive 2	

#### Proposed Part-Time Study Option

##### YEAR 1

Fall Term	Winter Term	Summer Term
MKTG 5200 Marketing Management	MKTG 6550 Brand Management	MKTG 6820 Marketing Dynamics
MKTG 6000 ELECTIVE (ACTG 5200 for non-bus)	MKTG 6560 Digital Marketing	MKTG 6000 ELECTIVE

##### YEAR 2

Fall Term	Winter Term	Summer Term
MKTG 6050 Marketing Research	MKTG 6370 Marketing Analytics	MKTG 6000 Field Project
MKTG 6100 Strategic Mktg Comms	MGMT 5290 (1.5) Professional Dev Hive 2	MKTG 6000 ELECTIVE
MGMT 5190 (1.5) Professional Dev Hive 1		

## Appendix: Consultation and Support Letters

*Consultation regarding this proposed minor program modification of adding a Part-Time Study Option to the Schulich Master of Marketing program has been undertaken with the individuals listed below. Emailed statements confirming consultation and support are available upon request.*

- *Emily Rush, Director, Academic Programs & Policy at York*
- *Ashwin Joshi, Associate Dean, Programs at Schulich*
- *Kevin Tasa, Associate Dean, Academic at Schulich*
- *Kiridaran (Giri) Kanagaretnam, Associate Dean, Students at Schulich*
- *Mike Valente, Director, MBA Program at Schulich*
- *Luke Zhu, Director, Master of Management Program at Schulich*
- *Lindsay Hillcoat, Executive Director, Student Services & Intl. Relations at Schulich*
- *Luba Pan, Director, Student & Enrolment Services at Schulich*
- *Kathryn Doyle, Director, Academic Affairs at Schulich*
- *Susan Calahan, Assistant Director, Recruitment and Admissions at Schulich*
- *David Rice, Area Coordinator, Marketing at Schulich*

## EMBA 6003 2.0: Using Analytics to Create and Capture Value in Healthcare

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1. **Program:** Kellogg-Schulich Executive MBA
2. **Course Number:** EMBA 6003
3. **Credit Value:** 2.0
4. **Long Course Title:** Using Analytics to Create and Capture Value in Healthcare
5. **Short Course Title:** Using Analytics in Healthcare
6. **Effective Session:** Winter 2025
7. **Calendar (Short) Course Description:**

This course is for managers who want to better understand empirical arguments in the healthcare industry. It combines (brief) lectures on technical content, mini-data labs, and discussions of assigned readings to familiarizes students with basic tools of modern data science through hands-on experience. Participants will learn how to use analytics and data to address decisions faced by healthcare firms.
8. **Expanded Course Description:**

This course is for managers who want to better understand empirical arguments in the healthcare industry. Students will become familiar with basic tools of modern data science through hands-on experience and will learn how to use analytics and data to address decisions faced by healthcare firms. Within healthcare, claims about the impact of various initiatives are increasingly based on data-driven analyses going beyond statistically significant relationships. This course will spend substantial time evaluating those claims. It will help participants to identify the types of questions that can be feasibly addressed by these kinds of analyses and to develop the ability to be a good consumer of arguments made with data, which involves understanding their limitations, including ethical considerations, scalability and external validity. The course combines (brief) lectures on technical content, mini-data labs (typically in groups), and discussions of assigned articles and cases. Because the aim of the course is to build critical and analytical thinking abilities, students will spend much of your time preparing for and engaging in class discussion.
9. **Course Learning Outcomes:**

Upon completion of the course, students will be able to:

  - Describe the challenge of using data as a key input to strategic decision-making.
  - Develop strategies that provide analytical insights.
  - Evaluate arguments made by clinicians and practitioners.
  - Analyze a dataset to answer a strategic question.
  - Argue a strategic position using a combination of internal and external analysis.
10. **Rationale:**

Every year we have a few students from the healthcare sector in the program, coming from both medical and business backgrounds. This is another elective course offered to them by

Kellogg, our partner in the Global EMBA Network. It is meant for those in healthcare or interested in it, who are increasingly confronted with claims about the impact of various initiatives. Assessing such claims is an important skill but becomes increasingly difficult as more sophisticated data analysis is being used. To become a more discerning 'consumer' of such data with the ability to distinguish between weak and strong claims, they need to understand the tools being used, which is best done by practicing them and critically discussing their results and implications, which is what this course aims to achieve. This particular course might also be of interest to those working in the data analytics area, who want to know what users in healthcare are looking for.

**11. Evaluation:**

Assessment is based on both individual and group-based assignments. The former include the critical evaluation of two data-based arguments (15% each) and class participation (25%). Together with other members of the class they are asked to complete another problem set (10%) and prepare a 6-page case write-up (35%).

**12. Integrated Courses:**

NOT integrated

**13. Crosslisted Courses:**

NOT crosslisted

**14. Faculty Resources:**

This course is being offered by our partner, the Kellogg School of Management of Northwestern University. It is taught by Amanda Starc, who received a PhD in Business Economics from Harvard University and is now an Associate Professor of Strategy at Kellogg and a Faculty Research Fellow at the National Bureau of Economic Research (NBER). Her research agenda sits at the intersection of industrial organization and health economics.

**15. Physical Resources:**

Classes for this course will be held over two weekends: one takes place at Kellogg's Evanston campus, the other at a location in Boston with all necessary resources organized by the Kellogg School of Management.

**16. Bibliography and Library Statement:**

All the pre-readings as well as the case studies for the various class sessions are posted on the Kellogg Canvas site, to which our students will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

# MEMORANDUM

## York University Libraries

**To:** Matthias Kipping

**From:** Angie Liann, Teaching and Learning Librarian, Student Learning & Academic Success Department

**Date:** February 6, 2025

**Subject:** Library Statement of Support - Kellogg | Schulich EMBA: Using Analytics to Create and Capture Value in Healthcare

### Summary

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

### Collections

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

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

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

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

#### **Selection of Business Databases:**

- Mergent Intellect
- Marketline Advantage
- Statista
- Complete listing of databases available on [Business Databases A-Z webpage](#)

#### **Business Articles & Newspaper Collections:**

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

#### **eBook Platforms:**

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

## **Services**

#### **Library Instruction**

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

#### **Research Guides & eLearning Modules of Interest:**

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

- [Industry Research Guide](#)
- [Market Research Guide](#)
- [Country & International Business Information](#)
- [Health Industry Administration](#)

## **Research Help**

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

## **Accessibility Services**

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

# Northwestern | Kellogg

## HCAK 941: Using Analytics to Create and Capture Value in Healthcare Spring 2025

**Professor Amanda Starc (she/her)**  
[amanda.starc@kellogg.northwestern.edu](mailto:amanda.starc@kellogg.northwestern.edu)

This course is for managers who want to better understand empirical arguments in the healthcare industry. Students will become familiar with basic tools of modern data science through hands-on experience and will learn how to use analytics and data to address decisions faced by healthcare firms. Data-driven analyses require going beyond statistically significant relationships to assess cause and effect. This course extends regression analysis to answer causal questions.

The most important tool we will develop is the ability to be a good consumer of arguments made with data. Within healthcare, firms frequently make claims about the impact of various initiatives. In this course, we will spend substantial time evaluating those claims. Will value-based care lower costs? Will firms be able to capture some of the incremental value created? Will investing in quality improve outcomes or firm profits? Will advertising increase firm profits?

The course begins a problem – increasingly large datasets are used to make strategic and policy arguments in the healthcare industry, but many data-based arguments are incomplete, misleading, or confusing. To understand this, we will use a classic example: What drives high healthcare costs? To pinpoint causes (and argue for solutions), many analysts highlighted variation in costs across markets. For example, Medicare costs are higher in McAllen, Texas, than El Paso. We will discuss potential drivers of higher costs, such as “entrepreneurial” physicians. Students will then explore the data to evaluate the veracity of the underlying premise. Finally, we will discuss possible ways to disentangle consumer preferences and provider behavior. The last part of our discussion will highlight a potential solution to the key issue of the course – identifying causal patterns in big datasets.

We will then spend four weeks discussing solutions to the key issue identified by the course. Throughout our discussion, the goal will be to make students a good consumer of arguments made with data. To that end, we will begin by discussing the “gold standard” for teasing out cause and effect: a randomized controlled trial. Students will consider how to design an experiment to answer an important strategic and policy question. Students will also be forced to confront key limitations of their analysis, including any ethical considerations, scalability and external validity, and the types of questions that can be feasibly addressed.

Given the limitations identified in Week 2, we will discuss several ways in which students may be able to disentangle cause and effect without an experiment. In doing so, students will increasingly engage with the arguments being made by clinicians and practitioners. In Week 3, students will be asked to synthesize the clinical literature to understand how a healthcare startup may or may not be able to create value. In Week 4, students will be asked to directly analyze data that will guide a new entrant considering their comparative advantage (and ability to capture value) within the industry. In Week 5,

students will be asked to develop a strategic and policy position and debate their classmates on the merits of their arguments.

Conceptually, students will develop a toolkit that will help them distinguish between weak and strong claims. We will explore several quasi-experimental "tools," including regression discontinuity, difference-in-differences, and instrumental variables. In discussing these techniques, our goal is to illuminate the key assumptions being made and the relative strengths and weaknesses of various arguments. In doing so, the tools of causal inference will help us evaluate arguments that affect firms within the healthcare industry.

By the end of the course, students will be able to:

- Describe the challenge of using data as a key input to strategic decision-making,
- Develop strategies that provide analytical insights,
- Evaluate arguments made by clinicians and practitioners,
- Analyze a dataset to answer a strategic question, and
- Argue a strategic position using a combination of internal and external analysis.

## Teaching Approach

This course will combine (brief) lectures on technical content, mini-data labs (typically in groups), and discussion of assigned articles and cases. Because the aim of the course is build your own critical and analytical thinking abilities, you will spend much of your time preparing for and engaging in class discussion.

## Preparation

Preparing for a case discussion means more than just reading the case or assignment. Each week will include several preparation questions. I suggest reviewing the questions before reading the materials or "opening" the data. It is a good idea always to be asking yourself, "Do I believe this argument? Where else does it apply? When would this approach not be useful?"

**If for some reason you are not prepared for class, I expect you to let me know before class.** I know that you are juggling work, other classes and other commitments; you don't need to give me an explanation. However, if you haven't told me otherwise, then you have implicitly committed to be ready to contribute to the class if I should call on you.

## Flexibility

This is a brand new course! So, while I will stick as much as possible to the broad outlines on things like gradings and expectations, I reserve the right to make change as circumstances merit. More importantly, I think it is important to realize that all of us are figuring out how to do this. As we learn what works and what does not, we will adjust! Indeed, a key theme of this course is that strategy is too complicated for there ever to be a "complete plan" of how things will work. Instead, things are necessarily dynamic, unfolding with circumstance. That couldn't be more true than today.

Students are expected to respect Kellogg's Code of Student Etiquette at all times.

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## Unauthorized Recordings

Remote class sessions will be recorded in Zoom and made available to class participants. Unauthorized student recording of classroom or other academic activities (including advising sessions or office hours) is prohibited. Unauthorized recording is unethical and may also be a violation of University policy and state law. Students requesting the use of assistive technology as an accommodation should contact AccessibleNU. Unauthorized use of classroom recordings – including distributing or posting them – is also prohibited. Under the University's Copyright Policy, faculty own the copyright to instructional materials – including those resources created specifically for the purposes of instruction, such as syllabi, lectures and lecture notes, and presentations. Students cannot copy, reproduce, display, or distribute these materials. Students who engage in unauthorized recording, unauthorized use of a recording, or unauthorized distribution of instructional materials will be referred to the appropriate University office for follow-up.

## Readings

A course packet, which includes the cases on the syllabus, is required. This course packet is available from the following link: <https://www.study.net/kellogg/>.

**I may cold call you to discuss any of the required readings.** There will also be optional additional readings: these may give further information about companies or issues we have discussed in class. To be as nimble as possible, I tend not to list all of these in the syllabus, but links will be provided in the slides. You can always reach out to me for more readings!

## Additional Course Materials

The following materials will be posted on the course's Canvas website.

- **Course announcements:** I will use the Canvas site to post course-related announcements and reminders. As a result, you should check the site regularly. If there is something critical to which I need to draw your attention, I will also email you.
- **Assignments:** The website will contain the group case assignments, the individual case assignments, and the preparation questions for each case.
- **Slides and handouts from class:** Anything I hand out in class will be posted on Canvas. If you miss something or lose something, you can find it there. These will also be posted to the "Modules" section of Canvas.

## Contact Information and "Office Hours"

You can reach me by email at [amanda.starc@kellogg.northwestern.edu](mailto:amanda.starc@kellogg.northwestern.edu). **By far, the most effective way to reach me is by email.** If you would like to make an appointment to chat, please use the Calendly link on Canvas. Please include a Zoom link. "Office/happy/coffee" hour is tentatively scheduled for 3:30-4:30 on Wednesday afternoons; additional times or modalities can be added to accommodate student demand.

## Academic Integrity

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Students are expected to respect Kellogg's Honor Code at all times. The first point of the Kellogg Honor Code is "not to seek an unfair advantage over other students, including but not limited to giving or receiving unauthorized aid during completion of academic requirements." The consequences of cheating can be failing an assignment or the course, or suspension or dismissal from the university.

### Assignments

Written case assignments are expected to be the efforts solely of the individual or group turning them in. For individual assignments, you may use discussion with classmates to brainstorm issues, evaluate alternative approaches, and consider the merits of recommendations. Use your own judgment to identify the important issues, to construct arguments and to develop correct conclusions. The same rules apply to groups for group case assignments. The group should not consult the Internet, friends at other business schools, or people who have taken the course already.

### Plagiarism

The members of any academic community are expected not to present as their own ideas or material from other sources. Northwestern's academic integrity guidelines state: "A conscientious writer always distinguishes clearly between what has been learned from others and what he or she is personally contributing to the reader's understanding." See <http://www.northwestern.edu/uacc/plagiar.html> for more information.

If you use text that is **exactly, mostly, or even partially someone else's words**, it needs to be attributed to that source and the quoted portion needs to be in quotation marks. If you use text that is **paraphrased** from another source, it needs to be attributed. This applies even if it something you yourself wrote that was handed in as an assignment or published elsewhere.

I **strongly** recommend against the practice of cutting and pasting from a source into a "working document" that will eventually become the final document handed in, unless you insert the appropriate quotation marks and citations at the same time. This is especially true for group assignments where another group member may not realize that something you put into the document needs a citation.

In the context of this course, it is acceptable to refer to concepts, frameworks, and analytical tools from the readings or class lectures without citation. You may also *refer* to the material in cases without citations. However, do not quote or paraphrase analysis from another source and present it as your own. All written assignments **will be cross-referenced against existing published work. No credit will be given for any assignment in which there is any evidence of plagiarism. Repeated offenses will be referred to the Honor Code Committee.**

## Assignments and Assessment

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Each week involves an assignment, to be completed either in a group or individually. Assignments require students to explore, propose, synthesize, produce and evaluate a data-based argument. These assignments will compose the bulk of the grade. The remaining 25% of the grade will be based on class participation. Case prep questions (for weeks 3-5) will be part of the class participation grade.

Week	Type	Deliverable	% of Grade	Due Date
1: Explore	Group	Problem Set	10%, Pass/Fail	During class, 2/14
2: Practice	Individual	Problem Set	15%	2/21
3: Analyze	Individual	Evaluation of <i>Maven</i> executive arguments, drawing from the clinical literature (2-3 pages)	15%	Before class, 2/16
4: Produce	Group	<i>Nursing Home Industry</i> OR <i>Direct-to-Consumer Advertising</i> Case Writeup, depending on group (3-5 pages of text, approximately 6 pages total)	35%	In class presentation + writeup, Evanston sessions

\* Prior to the case discussion, the teams should prepare exhibits to be shared with the class. I will call on the groups assigned to each case during class discussion. Groups should incorporate feedback from class discussion into the final memo. Each group will turn in 1 memo for EITHER the *Nursing Home Case* OR the *Direct-to-Consumer Advertising* case. However, all students are expected to come prepared for class and I will cold call randomly from the entire group when not explicitly discussing the data!

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## Schedule of Course Readings

### Session 1: What drives variation in healthcare outcomes?

- Herrera, S. "Amazon Sweetens Prime Offerings as Growth Stalls," *Wall Street Journal*, November 6, 2022.
- (Skim if you have already seen this article.) Gawande, A. "The Cost Conundrum," *The New Yorker*, May 25, 2009.
- Abelson, R. and Sanger-Katz, M. "How Insurers Exploited Medicare Advantage for Billions," *The New York Times*, October 8, 2022.

### Session 2: How do organizations create value in healthcare?

- (Skim if you have already seen this article.) Gawande, A. "The Hot Spotters," *The New Yorker*, January 16, 2011.
- (Optional) Technical Note: Randomized Controlled Trials
- Carroll, A. "Workplace Wellness Programs Don't Work Well. Why Some Studies Show Otherwise," *The New York Times*, August 6, 2018.
- Bannon, L. "When AI Overrides the Nurses Caring for You," *The Wall Street Journal*, June 15, 2023.

### Session 3: How do firms capture value in healthcare?

- Cain Miller, C., Kliff, S., and Buchanan, L. "Childbirth Is Deadlier for Black Families Even When They're Rich, Expansive Study Finds," *The New York Times*, February 15, 2023.
- *Case: Maven Clinic: Women's Health in the Digital Age (HBS)*
- Wilde Mathews, A., McGinty, T., and Evans, M. "How Much Does a C-Section Cost?" *The Wall Street Journal*, February 11, 2021.
- (Optional) Technical Note: Regression Discontinuity Design

### Session 4: How does firm ownership affect value creation and capture?

- *Case: Quality Provision in the Nursing Home Industry (Kellogg)*
- (Optional) Technical Note: Difference-in-Differences

### Session 5: Synthesis: Causal Inference for Firm Decision Making and Public Policy

- *Case: Pharmaceutical Advertising Strategies: Creating Success with Statins (Kellogg)*
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## EMBA 6011 2.0: Unlocking Executive & Enterprise Value with Generative AI

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1. **Program:** Kellogg-Schulich Executive MBA
2. **Course Number:** EMBA 6011
3. **Credit Value:** 2.0
4. **Long Course Title:** Unlocking Executive & Enterprise Value with Generative AI
5. **Short Course Title:** Generative AI Strategies for Executives
6. **Effective Session:** Winter 2025
7. **Calendar (Short) Course Description:**

This course equips students with an understanding of how Machine Learning and Generative AI can help transform organizations (and the value they deliver to customers) rather than simply automate tasks. Based on real world examples, students will learn how to make a business use case as well as build and implement the appropriate technologies in an ethical way.
8. **Expanded Course Description:**

Through a blend of case studies and interactive modules with executives, students will be equipped with board-level frameworks of how to use Generative AI and Machine Learning to solve real-world problems, including diving deep into strategies like Share of Wallet and Whole Offer. As the course progresses, they will gain a foundational grasp of machine learning and AI, setting the stage for a deep dive into the world of generative AI. This knowledge serves as a launchpad to reimagine their organization's transformation, emphasizing profitability and cost efficiency from the outset. The course challenges participants to apply generative AI in real-world scenarios, unlocking unprecedented value and driving profitability. Students will refine their strategies, ensuring they are primed for seamless scalability, while also considering the effective structure and governance of AI to ensure efficient operations as well as its ethical use.
9. **Course Learning Outcomes:**

Upon completion of the course, students will be able to:

  - Understand the foundational frameworks of using technology for transforming towards an outcome for either customers or the own organization.
  - Approach Generative AI with a long-term transformation mindset tied to unlocking enterprise value.
  - Develop convincing stories to drive the transformation of their organization with AI.
  - Understand the need to treat their organization's data as a rare and real asset for both internal use and external partnership opportunities.
10. **Rationale:**

Generative AI and Machine Learning are supposed to hold significant promise for all kinds of businesses and sectors. It has therefore become imperative for executives, in particular,

but not only, those without or with limited technical backgrounds, to understand their potential as well as their challenges to value creation, so as to be able to carefully consider and ultimately guide the possible transformation of their organizations based on these technologies. Consequently, there is significant interest among a large number of students in the Kellogg EMBA Global Network to learn more about how to evaluate and implement them. This is one of several new courses designed to address this demand.

**11. Evaluation:**

Assessment is entirely individual. 75% is based on the assignments to be submitted for each of the in-person class sessions, with the final two receiving a higher weighting and missing or late assignments receiving 0 points. 25% is based on class participation with a focus on in-depth contributions to the different AI topics.

**12. Integrated Courses:**

NOT integrated

**13. Crosslisted Courses:**

NOT crosslisted

**14. Faculty Resources:**

This course is being offered by our partner, the Kellogg School of Management at Northwestern University. It is taught by Clinical Assistant Professor of Product Management and AI Birju Shah. Birju holds a BSE in Industrial Engineering from Northwestern University and an MBA from the Sloan School of Management at MIT. He is a seasoned product leader, entrepreneur, and educator with over 15 years of experience in building and scaling innovative AI and ML products for various industries and use cases.

**15. Physical Resources:**

Classes for this course will be held in an online orientation and 5 intensive in-person days on Kellogg's Miami campus.

**16. Bibliography and Library Statement:**

All the compulsory and optional case studies and readings as well as the for the various class sessions are posted on the Kellogg Canvas site, to which our students will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

# MEMORANDUM

## York University Libraries

**To:** Matthias Kipping

**From:** Angie Liann, Teaching and Learning Librarian, Student Learning & Academic Success Department

**Date:** February 6, 2025

**Subject:** Library Statement of Support - Kellogg | Schulich EMBA: Unlocking Executive & Enterprise Value with Generative AI

### Summary

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

### Collections

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

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

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

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

#### **Selection of Business Databases:**

- Mergent Intellect
- Marketline Advantage
- Statista
- Complete listing of databases available on [Business Databases A-Z webpage](#)

#### **Business Articles & Newspaper Collections:**

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

#### **eBook Platforms:**

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

## **Services**

#### **Library Instruction**

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

#### **Research Guides & eLearning Modules of Interest:**

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

- [Industry Research Guide](#)
- [Market Research Guide](#)
- [Country & International Business Information](#)
- [Artificial Intelligence](#)

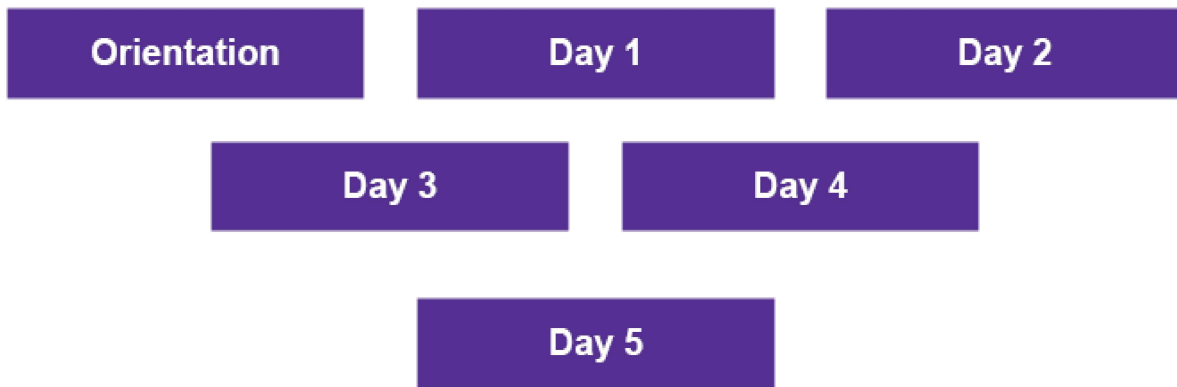
## **Research Help**

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

## **Accessibility Services**

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

# Assignments & Materials S



Use the buttons above to quickly navigate to the required readings, assignments, and materials outlined below for each day of the program. At the discretion of the faculty, due to some embedded answers or reveals, and for intellectual property reasons, some slides will not be shared in advance of a session, or at all. Each session below will note if and when slides will be shared.

***Please note: All materials and slides below are copyrighted – reproduction or distribution of these items is not permitted.***

## Advance Readings for Overall Program - Watch Before our Session Please

A recent global event occurred in Paris before our session hosted by President Macron of France & Prime Minister Modi of India. Please watch some of the below videos to get up to speed so we can have in depth conversations.


**JD Vance's Speech** [https://www.google.com/search?](https://www.google.com/search?q=JD+Vance+AI+Summit+Paris&sca_esv=1efd172859308584&udm=7&biw=2358&bih=1172&sxsrf=AHTn8zqEKH1iZ5fFuclO4yhJoTsqyggWhg%3A1739543744251&ei=wFSvZ9n-DqLz0PEPz8P8sAI&ved=0ahUKEwjZ3sm3scOLAxWiOTQIHc8hHyYQ4dUDCBI&uact=5&oq=JD+Vance+AI+Summit+Paris&gs_l=Ep=EhZnd3Mtd2I6LW1vZGVsZXNzLXZpZGVvIhhKRCBWW5jZSBBSSTdW1taXQgUGFyaXMyBRAhGKABMgUQIRigATIFECEYoAFI7iFQqghYuyFwA3gAkAEAmAFioAHIDKoBAjIzuAEDyAE-A- AEBmAlaoAKvDclCBRAAGO8FwglIEAAYgAQYogTCAggQABiiBBiJBcICCxAAGIAEGJECGloFwglKEAAYgAQYQxiKBclCDhAAGIAEGLEDGIMBGloFwglIEAAYgAQYsQMYgwHCAgUQABiABMICCBAAGIAEGLEDwglOEAAAYgAQYkQIYsQMYigXCAg0QABiABBixAxhDGloFwglKEAAYgAQYsQMYCsICBxAAGIAEGArCAgYQABgWGB7CAgUQIRirAppDAIgGAZIHBDI1LjGgB6pp&scient=gws-wiz-modeless-video#fpstate=ive&vld=cid:bbdf81cc,vid:SHpwxUJvIPo,st:0)

[https://www.google.com/search?q=JD+Vance+AI+Summit+Paris&sca\\_esv=1efd172859308584&udm=7&biw=2358&bih=1172&sxsrf=AHTn8zqEKH1iZ5fFuclO4yhJoTsqyggWhg%3A1739543744251&ei=wFSvZ9n-DqLz0PEPz8P8sAI&ved=0ahUKEwjZ3sm3scOLAxWiOTQIHc8hHyYQ4dUDCBI&uact=5&oq=JD+Vance+AI+Summit+Paris&gs\\_l=Ep=EhZnd3Mtd2I6LW1vZGVsZXNzLXZpZGVvIhhKRCBWW5jZSBBSSTdW1taXQgUGFyaXMyBRAhGKABMgUQIRigATIFECEYoAFI7iFQqghYuyFwA3gAkAEAmAFioAHIDKoBAjIzuAEDyAE-A- AEBmAlaoAKvDclCBRAAGO8FwglIEAAYgAQYogTCAggQABiiBBiJBcICCxAAGIAEGJECGloFwglKEAAYgAQYQxiKBclCDhAAGIAEGLEDGIMBGloFwglIEAAYgAQYsQMYgwHCAgUQABiABMICCBAAGIAEGLEDwglOEAAAYgAQYkQIYsQMYigXCAg0QABiABBixAxhDGloFwglKEAAYgAQYsQMYCsICBxAAGIAEGArCAgYQABgWGB7CAgUQIRirAppDAIgGAZIHBDI1LjGgB6pp&scient=gws-wiz-modeless-video#fpstate=ive&vld=cid:bbdf81cc,vid:SHpwxUJvIPo,st:0](https://www.google.com/search?q=JD+Vance+AI+Summit+Paris&sca_esv=1efd172859308584&udm=7&biw=2358&bih=1172&sxsrf=AHTn8zqEKH1iZ5fFuclO4yhJoTsqyggWhg%3A1739543744251&ei=wFSvZ9n-DqLz0PEPz8P8sAI&ved=0ahUKEwjZ3sm3scOLAxWiOTQIHc8hHyYQ4dUDCBI&uact=5&oq=JD+Vance+AI+Summit+Paris&gs_l=Ep=EhZnd3Mtd2I6LW1vZGVsZXNzLXZpZGVvIhhKRCBWW5jZSBBSSTdW1taXQgUGFyaXMyBRAhGKABMgUQIRigATIFECEYoAFI7iFQqghYuyFwA3gAkAEAmAFioAHIDKoBAjIzuAEDyAE-A- AEBmAlaoAKvDclCBRAAGO8FwglIEAAYgAQYogTCAggQABiiBBiJBcICCxAAGIAEGJECGloFwglKEAAYgAQYQxiKBclCDhAAGIAEGLEDGIMBGloFwglIEAAYgAQYsQMYgwHCAgUQABiABMICCBAAGIAEGLEDwglOEAAAYgAQYkQIYsQMYigXCAg0QABiABBixAxhDGloFwglKEAAYgAQYsQMYCsICBxAAGIAEGArCAgYQABgWGB7CAgUQIRirAppDAIgGAZIHBDI1LjGgB6pp&scient=gws-wiz-modeless-video#fpstate=ive&vld=cid:bbdf81cc,vid:SHpwxUJvIPo,st:0)

**Modi's Speech** <https://www.youtube.com/watch?v=2x2ZnoJ77kY>

## Advance Readings for Overall Program - ALL OPTIONAL, DOWNLOAD FOR YOUR LIBRARY

Professor Shah curated the best articles, platforms, and applications around generative AI, to give you the top pre-readings for the program. Some of these are older AI documents on purpose to give you a foundation. We look forward to our program!

A16z published an interesting [article](https://a16z.com/how-are-consumers-using-generative-ai/)  about the opportunity of generative AI point apps. The top 50 consumer generative AI apps by monthly active users, please start using these daily. Interestingly, in terms of enterprise value, 39 of these are already valued at over \$1B dollars with 5 of these worth over \$50B, all within 1 year! That is quite a bubble, is it here to stay? I think so. For context the number 1 app ChatGPT was 100K users about a year ago, now it is 100M users. The definition of a hockey stick. ChatGPT also had their first DevDay yesterday, we will publish notes. However, we are repeating the power of large tech conglomerates and platforms as their feature launches destroyed a significant amount of AI tool companies, some valued at over \$1B, as now no one needs these tools because ChatGPT does it on their platform (e.g. PDF upload, integrated with image generation), the platform is winning.

Top 50 GenAI Web Products, By Monthly Visits				
1.  ChatGPT	11.  YOU	21.  NightCafe	31.  GPTGPT	41.  Fliki
2.  character.ai	12.  leonardo.	22.  Replicate	32.  runway	42.  pornpen.ai
3.  Bard	13.  PIXLR	23.  Speechify	33.  Playground	43.  KAPWING
4.  Poe	14.  VEED.IO	24.  ElevenLabs	34.  Kaiber	44.  Gamma
5.  QuillBot	15.  Otome	25.  Lexica	35.  Hotpot	45.  Looka
6.  PhotoRoom	16.  AI-Novel	26.  VocalRemover	36.  Stable Diffusion	46.  human or not?
7.  CIVITAI	17.  cutout.pro	27.  Writesonic	37.  copy.ai	47.  PIXAI
8.  Midjourney	18.  ForefrontAI	28.  CHATPDF	38.  ZeroGPT	48.  WRITER
9.  Hugging Face	19.  Clipchamp	29.  D-ID	39.  Smodin	49.  NovelAI
10.  Perplexity	20.  TheB.AI	30.  Chub.ai	40.  ZMO.AI	50.  DeepSwap

Note: This list was generated based on global desktop and mobile web visits with data from SimilarWeb as of June 2023. However, for companies on the list that also have a mobile app, we added an estimate of their app "traffic" (MAU) to a separate per MAU per month, with data from Sensor Tower as of June 2023, alongside web traffic to determine their position on the list. This list does not include equity opportunities, and does not include activity happening within a closed system. Charts are for informational purposes only and should not be used for investment decisions. Past performance is not indicative of future results. None of the above should be taken as investment advice; see official disclosures for more.



**Biden's executive order** [↗\(https://bidenwhitehouse.archives.gov/briefing-room/presidential-actions/2025/01/14/executive-order-on-advancing-united-states-leadership-in-artificial-intelligence-infrastructure/\)](https://bidenwhitehouse.archives.gov/briefing-room/presidential-actions/2025/01/14/executive-order-on-advancing-united-states-leadership-in-artificial-intelligence-infrastructure/) is impressively detailed, even more so than the EU's AI Act though in true US fashion, very, very late. It's also an interesting foil to China's declaration to achieve AI supremacy a few months back. Recommend reading [this oped](https://www.chathamhouse.org/2023/10/balancing-chinas-role-uks-ai-agenda) [↗\(https://www.chathamhouse.org/2023/10/balancing-chinas-role-uks-ai-agenda\)](https://www.chathamhouse.org/2023/10/balancing-chinas-role-uks-ai-agenda) from Chatham House.

1. It's an executive order so let's see whether it survives into the next administration. UPDATE: IT DID NOT.
2. Some of the answers are premature. AI watermarks and authentication tools are ineffective and heavily stunts the debate. Concerns of data privacy will not be resolved by slapping a sticker on it.
3. Open vs. closed source is a can of worm even the government won't touch. The same goes for disinformation.

And where the EO shines:

1. The "red-team safety Tests" will create a new market for AI auditors – perhaps similarities can be drawn to ISO, SOC, etc. Some [experts](https://www.axios.com/2023/10/31/what-relying-on-ai-red-teaming-leaves-out?ref=runtime.news) [↗\(https://www.axios.com/2023/10/31/what-relying-on-ai-red-teaming-leaves-out?ref=runtime.news\)](https://www.axios.com/2023/10/31/what-relying-on-ai-red-teaming-leaves-out?ref=runtime.news) think this is also premature though.
2. New grants are being issued to encourage R&D and AI workforce training. NSF and Presidential fellowships have also extended deadlines to accommodate.

The AI Safety Summit @ Bletchley Park. Some extra reading I found informative. Link [1](https://www.understandingai.org/p/joe-bidens-ambitious-plan-to-regulate?utm_source=%2Finbox&utm_medium=reader2) [↗\(https://www.understandingai.org/p/joe-bidens-ambitious-plan-to-regulate?utm\\_source=%2Finbox&utm\\_medium=reader2\)](https://www.understandingai.org/p/joe-bidens-ambitious-plan-to-regulate?utm_source=%2Finbox&utm_medium=reader2), [2](https://www.runtime.news/how-dc-plans-to-watch-over-ai/) [↗\(https://www.runtime.news/how-dc-plans-to-watch-over-ai/\)](https://www.runtime.news/how-dc-plans-to-watch-over-ai/)

1. Remember when OpenAI had a [“written-by-AI” detector](https://arstechnica.com/information-technology/2023/09/openai-admits-that-ai-writing-detectors-dont-work/) [↗\(https://arstechnica.com/information-technology/2023/09/openai-admits-that-ai-writing-detectors-dont-work/\)](https://arstechnica.com/information-technology/2023/09/openai-admits-that-ai-writing-detectors-dont-work/)?

**Recently the first contract was negotiated with a generative AI bot.** The buy side and the sell side both used a generative AI bot to negotiate a full contract. Remarkable. A product highlight that does a good job of using generative AI for their entire suite of clients on the legal front is Ironclad: <https://ironcladapp.com/product/ai-based-contract-management/> [↗\(https://ironcladapp.com/product/ai-based-contract-management/\)](https://ironcladapp.com/product/ai-based-contract-management/)

## **GPTs!**

Open AI has launched "GPTs" which is a step towards documentation and automated agents. Everything we talked about the first day on the various zoom levels and starting to automate

tasks can now be done for enterprises with an easy way to document and configure a prompt. Be careful though they have enabled this for a community experience. Please read this helpful review of [GPTs](https://www.oneusefulthing.org/p/almost-an-agent-what-gpts-can-do?utm_source=substack&publication_id=1180644&post_id=138655836&utm_medium=email&utm_content=share&utm_campaign=email-share&triggerShare=true&isFreemail=true&r=h26jz)  ([https://www.oneusefulthing.org/p/almost-an-agent-what-gpts-can-do?utm\\_source=substack&publication\\_id=1180644&post\\_id=138655836&utm\\_medium=email&utm\\_content=share&utm\\_campaign=email-share&triggerShare=true&isFreemail=true&r=h26jz](https://www.oneusefulthing.org/p/almost-an-agent-what-gpts-can-do?utm_source=substack&publication_id=1180644&post_id=138655836&utm_medium=email&utm_content=share&utm_campaign=email-share&triggerShare=true&isFreemail=true&r=h26jz))

### [IDC - Preparing Your customers for AI everywhere \(must click download arrow\)](https://canvas.northwestern.edu/courses/228040/files/20909704?wrap=1)

(<https://canvas.northwestern.edu/courses/228040/files/20909704?wrap=1>) 

([https://canvas.northwestern.edu/courses/228040/files/20909704/download?download\\_frd=1](https://canvas.northwestern.edu/courses/228040/files/20909704/download?download_frd=1))


This was a keynote presentation given by Meredith Whalen, IDC's Chief Research Officer, at this year's IDC Global Research Advisory Council (GRAC). Below are some highlights from the deck:


- The current framing of gen AI is whether it is a productivity or revenue play; it is an AND, not an OR play, with the caveat that productivity use cases are up first (next 18 months)
- Productivity is the short-term opportunity; the long-term opportunity will arise as incumbents or challengers disrupt existing business models.
- 70% of enterprises will form strategic ties to cloud providers for GenAI platforms, developer tools and infrastructure – will gen AI accelerate tech encroachment?
- 60% of enterprises will mandate formal data literacy and responsible AI training by 2025; this could be a big opportunity for gen AI-related HCA work.
- Services firms expected to get 14% of overall gen AI budget over the next 18 months.

### [State of AI 2023 - Air Street Capital](https://canvas.northwestern.edu/courses/228040/files/20909660?wrap=1)

(<https://canvas.northwestern.edu/courses/228040/files/20909660?wrap=1>) 


([https://canvas.northwestern.edu/courses/228040/files/20909660/download?download\\_frd=1](https://canvas.northwestern.edu/courses/228040/files/20909660/download?download_frd=1))








- Smaller foundation models “appear” near parity at surface but do not pass tests with rigorous benchmarking.
  - That said, worth looking at newer Microsoft “[Orca](https://www.microsoft.com/en-us/research/publication/orca-progressive-learning-from-complex-explanation-traces-of-gpt-4/)”  (<https://www.microsoft.com/en-us/research/publication/orca-progressive-learning-from-complex-explanation-traces-of-gpt-4/>); they also imply this on slide 26
  - The case for specialized application-dependent LLMs is also there (slide 101) – smaller than general models but still billions of parameters
- We're getting closer to self-improvement/reflection in models – exciting and frightening
  - Slide 35 outlines how LLMs can make great prompt engineers
  - Slide 38 uses a simple game (Minecraft) to test how well LLMs can learn w/o clear inputs

- Eureka was published just a few days ago and shows LLMs can write their own reward functions that outperform humans!
- Of the top 20 scientific fields, sector-specific gen AI research medicine is growing the fastest while mathematics is the largest
  - Google Med-Palm is leading the charge, perhaps a halo effect – slide 44, 63, 64
  - During the pandemic, Moderna's covid vaccine was widely advertised as AI accelerated. After some media cooldown, Big Pharma is again pushing the AI narrative – slides 102 and 103.
- Gen AI apps have poor stickiness – continues to validate this earlier article, [LLMs are the new CPU](https://every.to/divinations/llms-are-the-new-cpus?sid=26757)  [\(https://every.to/divinations/llms-are-the-new-cpus?sid=26757\)](https://every.to/divinations/llms-are-the-new-cpus?sid=26757)
  - Slide 94 shows 1mt retention rate for incumbent consumer apps is 63%, while gen AI apps are 42%
  - This isn't stopping enterprises – 24% of all CVC went to AI in 2023 (slide 115), \$18B in global funding (slide 116)
- Move aside PayPal Mafia... the Transformers Mafia have collectively raised a billion dollars, plus the \$10B Microsoft investment
- The political agenda around AI has largely coalesced around three camps: introduce new legislation, ban the technology, and rely on existing laws.
  - The EU frequently leads global positions and they are opting for new legislation – slide 124.
  - The US, perhaps biased by constitutional views or laissez faire manner, leans towards relying on existing codes – slide 125 (**Updated: Unprecedented executive order under defense act via President**)
  - In this vacuum, market leaders are driving their own agenda – regulatory capture, favorable audit standards, etc. – slide 127
- RLHF is the standard at the moment but limitations should be recognized – slide 149
  - Human feedback can lead to issues in data quality, oversight, and feedback.
  - The machine reward model may be imperfect (vague, mismatch, not scoped)
  - Poorly defined policies can also lead to misgeneralization and power seeking behavior.




## OPTIONAL READINGS (FOR YOUR LIBRARY)

### *Business and Landscape Overview of Generative AI*

- McKinsey
  - [McKinsey Economic Potential of Generative AI](https://canvas.northwestern.edu/courses/228040/files/20909661?wrap=1)  [\(https://canvas.northwestern.edu/courses/228040/files/20909661/download?download\\_frd=1\)](https://canvas.northwestern.edu/courses/228040/files/20909661/download?download_frd=1)

- **What Every CEO should know about Generative AI**  
[\\_](https://canvas.northwestern.edu/courses/228040/files/20909662?wrap=1)   
[download\\_frd=1\)](https://canvas.northwestern.edu/courses/228040/files/20909662/download?download_frd=1)
- Sequoia:
  - **Creative New World with Generative AI**   
[\(https://www.sequoiacap.com/article/generative-ai-a-creative-new-world/\)](https://www.sequoiacap.com/article/generative-ai-a-creative-new-world/)
  - **Hybrid Workforce with Generative AI**  [\\_\(https://www.sequoiacap.com/article/ai-for-work-perspective/?itm\\_medium=related-content&itm\\_source=sequoiacap.com\)](https://www.sequoiacap.com/article/ai-for-work-perspective/?itm_medium=related-content&itm_source=sequoiacap.com)
  - **Important Trends in Generative AI**  [\\_\(https://www.sequoiacap.com/article/ai-50-2023/?itm\\_medium=related-content&itm\\_source=sequoiacap.com\)](https://www.sequoiacap.com/article/ai-50-2023/?itm_medium=related-content&itm_source=sequoiacap.com)
- Useful Presentations/Articles:
  - **November Updated AWS Preview of Applications of Generative AI in FIS industry**  
[\\_](https://canvas.northwestern.edu/courses/228040/file_contents/course%20files/Assignments/GENAI-Mar2024-GenAI_Financial_Services_use_case_engagement-A.pdf?canvas_=1&canvas_qs_wrap=1)  
[\\_](https://canvas.northwestern.edu/courses/228040/files/20909657?wrap=1)   
[download\\_frd=1\)](https://canvas.northwestern.edu/courses/228040/files/20909657/download?download_frd=1)
  - **Developing the AI P&L Mindset**  [\\_\(https://www.mesh-ai.com/blog-posts/how-to-improve-profit-margins-using-ai-in-financial-services-and-insurance\)](https://www.mesh-ai.com/blog-posts/how-to-improve-profit-margins-using-ai-in-financial-services-and-insurance)
  - **12 best gen AI models in 2023**  [\\_\(https://beebom.com/best-large-language-models-llms/\)](https://beebom.com/best-large-language-models-llms/)
  - **AI Needs So Much Power That Old Coal Plants Are Sticking Around**  
[\\_](https://canvas.northwestern.edu/courses/228040/files/20909657?wrap=1)   
[download\\_frd=1\)](https://canvas.northwestern.edu/courses/228040/files/20909657/download?download_frd=1)
  - **AI's Third Offset Strategy (US Military Perspective)**   
[\\_\(https://breakingdefense.com/2015/11/centaur-army-bob-work-robotics-the-third-offset-strategy/\)](https://breakingdefense.com/2015/11/centaur-army-bob-work-robotics-the-third-offset-strategy/)
    - **Hagel's Memo**  [\\_\(https://breakingdefense.com/2014/11/hagel-launches-offset-strategy-lists-key-technologies/\)](https://breakingdefense.com/2014/11/hagel-launches-offset-strategy-lists-key-technologies/)

*Problem (Not Prompt) Engineering And Prompt Architecture:*

- **AI Prompt Engineering Isn't the Future (hbr.org)**  
[\\_](https://canvas.northwestern.edu/courses/228040/files/20909656?wrap=1)   
[download\\_frd=1\)](https://canvas.northwestern.edu/courses/228040/files/20909656/download?download_frd=1)
-  [\\_\(https://hbr.org/2023/06/ai-prompt-engineering-isnt-the-future\)](https://hbr.org/2023/06/ai-prompt-engineering-isnt-the-future) **A comprehensive guide to prompt engineering (leewayhertz.com)**   
[\\_\(https://www.leewayhertz.com/prompt-engineering/\)](https://www.leewayhertz.com/prompt-engineering/)

*OPTIONAL Interesting Platform Companies for reference:*

- **Character.AI** ➞ [\(https://beta.character.ai/\)](https://beta.character.ai/)
- **Amazon Bedrock (for younger companies)** ➞ [\(https://aws.amazon.com/bedrock/\)](https://aws.amazon.com/bedrock/)
- **Microsoft Azure/Open AI (for older companies)** ➞ [\\_us/products/cognitive-services/openai-service/?ef\\_id= k\\_Cj0KCQjwkqSIBhDaARIsAFJANKjq6Sg82h5L-NLSMz-8qK2KkH05xoUuQ0xrDXIGe6zoRKxp0zHZTq4aAgxDEALw\\_wcB\\_k\\_&OCID=AIDcmm5eds wduu\\_SEM\\_k\\_Cj0KCQjwkqSIBhDaARIsAFJANKjq6Sg82h5L-NLSMz-8qK2KkH05xoUuQ0xrDXIGe6zoRKxp0zHZTq4aAgxDEALw\\_wcB\\_k\\_&gad=1&gclid=Cj0KCQjwkqSIBhDaARIsAFJANKjq6Sg82h5L-NLSMz-8qK2KkH05xoUuQ0xrDXIGe6zoRKxp0zHZTq4aAgxDEALw\\_wcB\)](https://azure.microsoft.com/en-us/products/cognitive-services/openai-service/?ef_id=k_Cj0KCQjwkqSIBhDaARIsAFJANKjq6Sg82h5L-NLSMz-8qK2KkH05xoUuQ0xrDXIGe6zoRKxp0zHZTq4aAgxDEALw_wcB_k_&OCID=AIDcmm5eds wduu_SEM_k_Cj0KCQjwkqSIBhDaARIsAFJANKjq6Sg82h5L-NLSMz-8qK2KkH05xoUuQ0xrDXIGe6zoRKxp0zHZTq4aAgxDEALw_wcB_k_&gad=1&gclid=Cj0KCQjwkqSIBhDaARIsAFJANKjq6Sg82h5L-NLSMz-8qK2KkH05xoUuQ0xrDXIGe6zoRKxp0zHZTq4aAgxDEALw_wcB)
- **Google Cloud Bard (for knowledge management)** ➞ [\(https://bard.google.com/\)](https://bard.google.com/)
- **c3.AI (for all AI transformation)** ➞ [\(https://c3.ai/\)](https://c3.ai/)
- **Service now (for the IT department)**  
[\\_ \(https://canvas.northwestern.edu/courses/228040/files/20909739?wrap=1\)](https://canvas.northwestern.edu/courses/228040/files/20909739?wrap=1) ↓  
[\\_ \(https://canvas.northwestern.edu/courses/228040/files/20909739/download?download\\_frd=1\)](https://canvas.northwestern.edu/courses/228040/files/20909739/download?download_frd=1)
- **Top Prompts for Microsoft 365 Co Pilot**  
[\\_ \(https://canvas.northwestern.edu/courses/228040/files/20909658?wrap=1\)](https://canvas.northwestern.edu/courses/228040/files/20909658?wrap=1) ↓  
[\\_ \(https://canvas.northwestern.edu/courses/228040/files/20909658/download?download\\_frd=1\)](https://canvas.northwestern.edu/courses/228040/files/20909658/download?download_frd=1)

*OPTIONAL Prof. Mohan Sawhney LinkedIn Video Posts*

- **Can Generative AI Be Truly Creative? Combinatorial Versus Transformational Creativity** ➞ [\\_ \(https://www.linkedin.com/posts/mohansawhney\\_generativeai-creativity-innovation-activity-7102748710077378560-c\\_DU?utm\\_source=share&utm\\_medium=member\\_desktop\)](https://www.linkedin.com/posts/mohansawhney_generativeai-creativity-innovation-activity-7102748710077378560-c_DU?utm_source=share&utm_medium=member_desktop)
- **Generative AI and the Disruption of Search: From Seeking to Getting Jobs Done** ➞ [\\_ \(https://www.linkedin.com/posts/mohansawhney\\_generativeai-chatgpt-google-activity-7066885121479507970-cbu1?utm\\_source=share&utm\\_medium=member\\_desktop\)](https://www.linkedin.com/posts/mohansawhney_generativeai-chatgpt-google-activity-7066885121479507970-cbu1?utm_source=share&utm_medium=member_desktop)
- **The Future of Identity in the Age of AI and Telemetry: Personal Digital Twins** ➞ [\\_ \(https://www.linkedin.com/posts/mohansawhney\\_ai-iot-telemetry-activity-7038622656073539584-yKFX?utm\\_source=share&utm\\_medium=member\\_desktop\)](https://www.linkedin.com/posts/mohansawhney_ai-iot-telemetry-activity-7038622656073539584-yKFX?utm_source=share&utm_medium=member_desktop)
- **Generative AI and the Future of Knowledge Work** ➞ [\\_ \(https://www.linkedin.com/posts/mohansawhney\\_ai-generativeai-chatgpt-activity-7036341224936538113-O3Dt?utm\\_source=share&utm\\_medium=member\\_desktop\)](https://www.linkedin.com/posts/mohansawhney_ai-generativeai-chatgpt-activity-7036341224936538113-O3Dt?utm_source=share&utm_medium=member_desktop)

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**Friday, February 21, 2025**

## Program Orientation



**Birju Shah** ([https://www.kellogg.northwestern.edu/faculty/directory/shah\\_birju/](https://www.kellogg.northwestern.edu/faculty/directory/shah_birju/))

Academic Director and Faculty



**Kendra Syed-Abdul** (<https://sites.northwestern.edu/kelloggteachingsupport/course-support/>)

EMBA Course Support Specialist



**Daniela Moros**

Program Manager

### Orientation Slides:

- **[Orientation-Session Slides](#)**

(<https://canvas.northwestern.edu/courses/228040/files/21154868?wrap=1>).

[https://canvas.northwestern.edu/courses/228040/files/21154868/download?download\\_frd=1](https://canvas.northwestern.edu/courses/228040/files/21154868/download?download_frd=1))

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## Grading

The class is graded as follows:

75% on assignments submitted with a heavy weighting towards the last two assignments. All assignments must be turned in CANVAS by their due dates. I will not accept assignments submitted to me via email. Assignment due dates are non-negotiable. For fairness and per the honor code, all students must adhere to the same deadlines. Any assignment submitted after the due date, as noted as “closed” on CANVAS, will receive a grade of zero, including the final assignment. Typically, failure to submit the last two assignments on time will result in a final grade of “U” (Unsatisfactory) or “LP” (Low Pass). A breakdown of the assignments and points allocated are in the assignment section of canvas.

25% is on class participation (not attendance) we want you engaged, and ability to talk in depth about the topics around AI through some of the optional readings versus surface level conversations on your "feeling" of AI. The more depth you bring to the conversation, the more we can quickly move past the table stakes and into the board room of implementation of this incredible technology transformation.

Typically I do have LPs & Us I give in this class, and the follow-ups I receive are usually because you decided to prioritize something else outside class. The simple answer is you all are executives, as I have been, if your submissions aren't of that caliber and your execution of your submissions are generic, due to being busy, you have decided as such, but your grade will reflect. I fall back to a simple questions I answer when grading: would I as a board member or CEO sponsor, invest, or say GO on your idea. Usually that answer is not subjective just based on your ability to have depth versus stay generic.

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**Monday, March 3, 2025**

## Social Connect and Program Day Kickoff

### Driving Sustainable Business Outcomes - Setting a Leadership Foundation for Scalable Generative AI



**Birju Shah** ([https://www.kellogg.northwestern.edu/faculty/directory/shah\\_birju/](https://www.kellogg.northwestern.edu/faculty/directory/shah_birju/))

Clinical Assistant Professor of Marketing - Specialty in Product Management, Analytics, Machine Learning, and AI

Former head of Uber AI

Former head of AI [x] - life sciences

**Founder Loam.Ag (Gen AI Outsourced Chief Climate Officer)** [\(https://www.loam.ag/\)](https://www.loam.ag/)

#### Session Description:

In this kick-off lecture, we will provide you with a fundamental understanding of the top leaders solving real problems with AI. Our goal this session is for you to uplevel your ability to have a problem oriented depth, understand how ML & AI is driven by outcomes (sometimes predictive and sometimes creative), while developing your story telling ability to transform your organizations with AI. We will set-up the rest of the week with you joining small teams to implement your data vision statement, optimization equation, and start to develop a project to highlight your ability to become an AI transformation leader that can find real value.

#### Slides:

- [Slides here \(https://canvas.northwestern.edu/courses/228040/files/21144988?wrap=1\)](https://canvas.northwestern.edu/courses/228040/files/21144988?wrap=1) [↓ \(https://canvas.northwestern.edu/courses/228040/files/21144988/download?download\\_frd=1\)](https://canvas.northwestern.edu/courses/228040/files/21144988/download?download_frd=1)

#### Assignment:

- [Data Pitch, Outcome Equation, Real/Win/Worth It Analysis \(https://canvas.northwestern.edu/courses/228040/assignments/1531204\)](https://canvas.northwestern.edu/courses/228040/assignments/1531204)

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## Tuesday, March 4, 2025

### Social Connect and Program Day Kickoff

### Developing your Platform Transformation with Value Mindset - Share of Wallet & Whole Offer

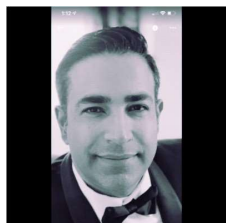



**Birju Shah** ([https://www.kellogg.northwestern.edu/faculty/directory/shah\\_birju/](https://www.kellogg.northwestern.edu/faculty/directory/shah_birju/))

#### Session/s Description:

A majority of leaders look at technology as task based transformation, rarely do we find leaders that take the leap to systemic transformation. In order for us to unlock real profit value from our organizations we need to understand the foundational frameworks of transforming towards an outcome for either A) customer or B) our company. In this lecture we will continue from day 1 to finish our foundations of leaders with technology by diving into the whole offer & share of wallet frameworks with exciting case studies from John Deere, Tesla, and others to round out our skills needed as executives to unlock value with Generative AI.

In session 2 we will start our journey to build platforms that unlock real value with an interactive case study on machine learning and predictive AI with Uber's last sqft case study. We will also have you all start playing with AI technology by creating GPTs & notebook LLM podcasts from your prior day's data vision statement.



Guest Speaker - We will have a guest speaker Navin [Nagrani](https://www.linkedin.com/in/navinnagrani)   [\(https://www.linkedin.com/in/navinnagrani\)](https://www.linkedin.com/in/navinnagrani) to discuss the hidden plays that need to exist in order for AI to reach its potential --> Infrastructure, Data Centers, and Real Estate. Navin was the managing director of [Hilco](https://hilcoglobal.com/)   [\(https://hilcoglobal.com/\)](https://hilcoglobal.com/) where he was in charge of real estate and distressed situations, a rarity to be speaking to us, and now leading the charge on real estate, data centers, and the power grid as an independent to enable AGI. Navin was also the past president of the Real Estate Investment Association

### Slides:

- [Slides here \(https://canvas.northwestern.edu/courses/228040/files/21145018?wrap=1\)](https://canvas.northwestern.edu/courses/228040/files/21145018?wrap=1).  [\(https://canvas.northwestern.edu/courses/228040/files/21145018/download?download\\_frd=1\)](https://canvas.northwestern.edu/courses/228040/files/21145018/download?download_frd=1)

### Assignment:

- [GPT & Notebook LLM Submission](https://canvas.northwestern.edu/courses/228040/assignments/1531206)  
[\(https://canvas.northwestern.edu/courses/228040/assignments/1531206\)](https://canvas.northwestern.edu/courses/228040/assignments/1531206)

**Wednesday, March 5, 2025**

## Social Connect and Program Day Kickoff

### Understanding the Foundations and Platform Value of Generative AI



[Birju Shah](https://www.kellogg.northwestern.edu/faculty/directory/shah_birju/) [\(https://www.kellogg.northwestern.edu/faculty/directory/shah\\_birju/\)](https://www.kellogg.northwestern.edu/faculty/directory/shah_birju/)

### Session/s Description:

In this lecture, we will provide you with a foundation of machine learning and AI to ground everyone on the same understanding level. We will provoke your evolutionary mindset as we dive into the "How we got here?" with language evolution to large language models. After a foundational



understanding of generative AI, we will walk you through your organization's transformation as a set-up for the rest of the program: with our generative AI double diamond leadership framework, the zoom level viewpoints leaders will need to take to unlock value with generative AI, the tactical pathway forward to start as an organization, and finally the top five technology questions to answer as an entry point to the next series of unlocking value with framework from Professor Shah.

## Creating Your Generative AI Strategy - Session 2

### Session Description:

We will explore why formulating an AI strategy is a crucial responsibility of the C-suite, emphasizing its integral role in shaping an organization's direction and competitive edge. We will guide you on determining 'where to play' by using a proprietary tool called the AI Radar to prioritize high-impact use cases that align with your business objectives. Next, we will delve into 'how to play' by employing the AI Canvas to construct a robust business case that includes the business problems, business value, customer value, data strategy, model decisions, testing, and scaling. Lastly, we will focus on organizing for AI, providing insights on the effective structure and governance of AI, to ensure efficient operation and the ethical use of AI technologies within your enterprise. Professor Shah will be presenting Professor Sawhney's lecture content on formulating an AI strategy to unlock transformation value with generative AI.

### Slides:

- [Slides here \(https://canvas.northwestern.edu/courses/228040/files/21397563?wrap=1\)](https://canvas.northwestern.edu/courses/228040/files/21397563?wrap=1)   
([https://canvas.northwestern.edu/courses/228040/files/21397563/download?download\\_frd=1](https://canvas.northwestern.edu/courses/228040/files/21397563/download?download_frd=1))
- [Gen AI Canvas Assignment \(https://canvas.northwestern.edu/courses/228040/files/21397617?wrap=1\)](https://canvas.northwestern.edu/courses/228040/files/21397617?wrap=1)   
([https://canvas.northwestern.edu/courses/228040/files/21397617/download?download\\_frd=1](https://canvas.northwestern.edu/courses/228040/files/21397617/download?download_frd=1))

### Assignment: GENAI Canvas for Task Automation Assignment

- [Link to GENAI Canvas for Task Automation Assignment \(https://canvas.northwestern.edu/courses/228040/assignments/1530786\)](https://canvas.northwestern.edu/courses/228040/assignments/1530786)
- Due before 11:59 pm EST Thursday

### Post Session Summary Videos:

- [Understanding the Foundations and Platform Value of Generative AI Post Session Summary Videos \(https://canvas.northwestern.edu/courses/228040/pages/day-1-understanding-foundations-and-platform-value-of-generative-ai\)](https://canvas.northwestern.edu/courses/228040/pages/day-1-understanding-foundations-and-platform-value-of-generative-ai)

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**Thursday, March 6, 2025**

## **Developing Your Competitive & Data Moat with Generative AI**

**Birju Shah** ([https://www.kellogg.northwestern.edu/faculty/directory/shah\\_birju/](https://www.kellogg.northwestern.edu/faculty/directory/shah_birju/))

### **Session Description:**

We kick-off with the changing dynamic of competition and developing a new moat in this world of generative AI. Everyone has heard the phrase data is the new oil; however, few understand that generative AI unlocks a \$3 trillion dollar value capture opportunity and its time to treat your data as a real and rare asset. We dive into the various dimensions of your data you need to understand to capture this value, understand the various data monetization calculators, and apply a must need or not need data framework (i.e. MSCW framework) to value your organization's data for internal use and external partnership value. In today's world and in the future, data-driven leadership is a whole new level of ballgame that every C-level will need to add to their deal making toolkit, especially with generative AI leading the transformation of your industries.

### **Slides:**

- [Slides here \(https://canvas.northwestern.edu/courses/228040/files/21407973?wrap=1\)](https://canvas.northwestern.edu/courses/228040/files/21407973?wrap=1)   
([https://canvas.northwestern.edu/courses/228040/files/21407973/download?download\\_frd=1](https://canvas.northwestern.edu/courses/228040/files/21407973/download?download_frd=1))

## **DEMO/Action Lab: Create yourself as a digital AI Avatar with Prifina**



**Markus Lampinen**  
CEO, Prifina

and **Birju Shah** ([https://www.kellogg.northwestern.edu/faculty/directory/shah\\_birju.aspx](https://www.kellogg.northwestern.edu/faculty/directory/shah_birju.aspx))

### **Session Description**

Prifina.AI and CEO Markus will take us through a hands on session to create your own digital twin avatar chatbot. Markus will show you with real-life people that have created their Avatars

how they are using it, and walk you through how to create your own within the Prifina platform as our start-up showcase for this program run.

**Slides:**

- [DEMO/Action Lab: Create yourself as a digital AI Avatar with Prifina - Session Slides](https://canvas.northwestern.edu/courses/228040/files/20909683?wrap=1) (<https://canvas.northwestern.edu/courses/228040/files/20909683?wrap=1>). [↓](https://canvas.northwestern.edu/courses/228040/files/20909683/download?download_frd=1) ([https://canvas.northwestern.edu/courses/228040/files/20909683/download?download\\_frd=1](https://canvas.northwestern.edu/courses/228040/files/20909683/download?download_frd=1))

**Assignment: GENAI Canvas Department Automation Assignment**

- [Link to GENAI Canvas Department Automation Assignment](https://canvas.northwestern.edu/courses/228040/assignments/1530785) (<https://canvas.northwestern.edu/courses/228040/assignments/1530785>)
- Due before 11:59 pm EST, Friday

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**Friday, March 7, 2025**

**Case Study & Fireside: Implementing AI at scale in a clinical practice**




**Dr. Romi Chopra**  
CEO, MMIT Healthcare

and [Birju Shah](https://www.kellogg.northwestern.edu/faculty/directory/shah_birju.aspx) ([https://www.kellogg.northwestern.edu/faculty/directory/shah\\_birju.aspx](https://www.kellogg.northwestern.edu/faculty/directory/shah_birju.aspx))

**Session Description**

MMIT Healthcare and CEO Dr. Romi Chopra, an interventional radiologist, will take us through how he has implemented AI across his medical practice, workflows, to create automation and grow his revenue from 4M to 14M in one year. Seeing AI implemented at a small business punching above its weight should give you an idea of how the power of Gen AI can achieve outsized results for businesses.

## Slides:

- [To be shared after \(https://canvas.northwestern.edu/courses/228040/files/21452956?wrap=1\)](https://canvas.northwestern.edu/courses/228040/files/21452956?wrap=1)  (https://canvas.northwestern.edu/courses/228040/files/21452956/download?download\_frd=1)

## The Macro & Future view of AI: Macro Trend, Evolution, and Speculation a discussion

### Session Description:

We will first explore an updated view of the generative AI landscape told through the lens of money flows, killer app, and evolution. We will also identify key themes shaping the evolution of AI and Generative AI, including Personalized AI, Collaborative AI, Self-Supervised Learning, Multimodal AI, Artificial Super Intelligence, and Personal Digital Twins. These themes will guide our conversation about possible advances as AI technologies become increasingly potent and influential.

### Slides:


- [The Future of Generative AI: Evolution, Trends, and Speculation-Session Slides \(https://canvas.northwestern.edu/courses/228040/files/21452954?wrap=1\)](https://canvas.northwestern.edu/courses/228040/files/21452954?wrap=1)  (https://canvas.northwestern.edu/courses/228040/files/21452954/download?download\_frd=1)

## Peer to Peer Gen AI Automation Scoring

### Session Description:

If we have time, we will conduct a peer to peer executive scoring session of your Gen AI automation ideas to unlock value. These are modeled after similar boardroom meetings Professor Shah has had over the last 18 months where the board had to decide to invest in various Gen AI transformation use cases.

### Slides:

- [Scoring & Examples \(https://canvas.northwestern.edu/courses/228040/files/20919929?wrap=1\)](https://canvas.northwestern.edu/courses/228040/files/20919929?wrap=1)  (https://canvas.northwestern.edu/courses/228040/files/20919929/download?download\_frd=1)

## Closing Debrief

[Birju Shah \(https://www.kellogg.northwestern.edu/faculty/directory/shah\\_birju/\)](https://www.kellogg.northwestern.edu/faculty/directory/shah_birju/)

### Slides:

- No slides

### Takeaways:

- **Chief of Staff Initiation Playbook for Organizations**  
(<https://canvas.northwestern.edu/courses/228040/files/20909699?wrap=1>)\_ ↓  
([https://canvas.northwestern.edu/courses/228040/files/20909699/download?download\\_frd=1](https://canvas.northwestern.edu/courses/228040/files/20909699/download?download_frd=1))
  - Curated from 15+ conversations with CEOs, CIO, CTOs implementing generative AI at their companies, the professors at Kellogg have provided you with a playbook to transforming your organizations with generative AI as a strategic planning process. These questions will guide you along the way as you approach this technology with a long term transformation mindset tied to unlocking enterprise value

### Supplemental Readings:

- The Sentient Enterprise: The Evolution of Business Decision Making: Ratzesberger, Oliver, Sawhney, Mohanbir, Davenport, Thomas H.: 9781119438861: Amazon.com: Books

## EMBA 6012 2.0: Executive Dilemmas: Decision Making Beyond Analytics

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1. **Program:** Kellogg-Schulich Executive MBA
2. **Course Number:** EMBA 6012
3. **Credit Value:** 2.0
4. **Long Course Title:** Executive Dilemmas: Decision Making Beyond Analytics
5. **Short Course Title:** Executive Dilemmas
6. **Effective Session:** Winter 2025

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

This course develops practical strategies for recognizing and confronting dilemmas where analytics tools do not apply due to volatile, unpredictable business environments or unique yet consequential challenges ("Black Swans"). Based on real-world cases, it leverages insights from behavioural economics, social psychology, social networks, and classic competitive strategy to identify and correct the adverse effects of systematic decision-making biases.

8. **Expanded Course Description:**

A core responsibility of business leaders is to navigate decision-making dilemmas where analytics tools do not apply. These dilemmas are most acute in volatile, unpredictable business environments where forces like virality, herd mentality, network effects, and tail risks play a prominent role. Conventional analytics is of limited value in confronting these unique yet highly consequential challenges ("Black Swans") because data about one-of-a-kind situations, by definition, does not exist, and the risk factors involved are difficult to measure and quantify. Yet, despite these deep uncertainties, decisions must still be made. This course emphasizes wise and practical strategies for recognizing and confronting these dilemmas in a way free from systematic decision biases. We go beyond statistical methods to leverage insights from behavioural economics, social psychology, social networks, and classic competitive strategy frameworks. Real-world cases are used to identify and correct the adverse effects of systematic decision-making biases that appear when facing these decision dilemmas.

9. **Course Learning Outcomes:**

Upon completion of the course, students will be able to:

- Identify the forces that create environments where risk factors are difficult to measure and quantify.
- Understand why conventional analytics tools are of limited value to aid decision-making in the resulting dilemmas.
- Understand why and how insights from other disciplines might be better suited to deal with such situations.
- Apply the resulting alternative tools in real world cases.

**10. Rationale:**

There are two interrelated, mutually reinforcing reasons that many KS EMBA students should be interested in this course and will benefit from its insights. Over the last few decades, business environments have increasingly become more volatile and the number of unpredictable, seemingly random but very consequential events has increased in frequency. At the same time, the growing sophistication of data analytics and the emergence of AI have most likely made them more confident that these analytics tools will help them find solutions for the dilemmas resulting from the afore mentioned situations. Since this is not true, it will often lead to less than desirable outcomes. Recognizing the limitations of analytics and instead drawing on different tools based on insights from different disciplines is therefore a crucial skill for these managers, especially those working in sectors and roles prone to volatility and unpredictability.

**11. Evaluation:**

Assessment is largely team-based with two group mini-case write-ups (15% each) and a group presentation (50%), reflecting the importance of collaboration when dealing with executive dilemmas. This will be somewhat balanced by individual class participation and peer evaluation (20%).

**12. Integrated Courses:**

NOT integrated

**13. Crosslisted Courses:**

NOT crosslisted

**14. Faculty Resources:**

This course is being offered by our partner, the Kellogg School of Management of Northwestern University during a Global Electives Week. It is taught by Nabil Al-Najjar, the John L. and Helen Kellogg Professor of Managerial Economics and Decision Sciences, who received his PhD in Economics from the University of Minnesota. Professor Al-Najjar's research focuses on the development of learning-based models of decision making in markets, games and contracts. For his excellence in teaching, he has received multiple awards: the school's Sidney J. Levy Award, the Chairs' Core Teaching Award as well as several *Certificate of Impact* awards.

**15. Physical Resources:**

Classes for this course will be held over five days in person at Kellogg's Miami campus, where all necessary resources will be organized and provided by the Kellogg School of Management.

**16. Bibliography and Library Statement:**

There is no textbook for this course. All the required as well as optional readings for the various class sessions are posted on the Kellogg Canvas site, to which our students will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

# MEMORANDUM

York University Libraries

**To:** Matthias Kipping

**From:** Angie Liann, Teaching and Learning Librarian, Student Learning & Academic Success Department

**Date:** February 6, 2025

**Subject:** Library Statement of Support - Kellogg | Schulich EMBA: Executive Dilemmas: Decision-Making Beyond Analytics

## Summary

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

## Collections

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

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

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

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

#### **Selection of Business Databases:**

- Mergent Intellect
- Marketline Advantage
- Statista
- Complete listing of databases available on [Business Databases A-Z webpage](#)

#### **Business Articles & Newspaper Collections:**

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

#### **eBook Platforms:**

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

## **Services**

#### **Library Instruction**

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

#### **Research Guides & eLearning Modules of Interest:**

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

- [Industry Research Guide](#)
- [Market Research Guide](#)
- [Country & International Business Information](#)

## **Research Help**

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

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[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](mailto:lashelp@yorku.ca) with questions.

# Executive Dilemmas: *Decision Making Beyond Analytics*

Kellogg Global Electives

Miami, March 2025

Professor Nabil Al-Najjar

## **What this course is about**

A core responsibility of business leaders is to navigate decision-making dilemmas where analytics tools do not apply. These dilemmas are most acute in volatile, unpredictable business environments where forces like virality, herd mentality, network effects, and tail risks play a prominent role. Conventional analytics is of limited value in confronting these unique yet highly consequential challenges ("Black Swans") because data about one-of-a-kind situations, by definition, does not exist, and the risk factors involved are difficult to measure and quantify.

Yet, despite these deep uncertainties, decisions must still be made. This course emphasizes wise and practical strategies for recognizing and confronting these dilemmas in a way free from systematic decision biases. We go beyond statistical methods to leverage insights from behavioral economics, social psychology, social networks, and classic competitive strategy frameworks. Real-world cases are used to identify and correct the adverse effects of systematic decision-making biases that appear when facing these decision dilemmas.

For additional information, visit the course website:

[http://bit.ly/Deep\\_Uncertainty\\_Elective](http://bit.ly/Deep_Uncertainty_Elective)

## Course Grading

1. Two group mini-case write-ups (30%)
2. Group presentation (50%).
3. Individual class participation and peer evaluation (20%).

Details about these requirements will be discussed in class.

## Readings and Preparation

There is no textbook for this course. Slides, cases, and readings will be made available on Canvas. There are three types of readings, which you can do either in groups or individually:

- *Required preparation:* These require prior reading and answering discussion questions. Details on what is needed for the first class appear below. Preparation sometimes requires elementary Excel modeling and numerical calculations.
- *Required readings:* You should do These essential readings before class; however, no numerical answers or formal discussion questions are expected.
- *Optional readings:* These are interesting supplementary readings.

# Course Outline

## Day 1

*Monday, March 3, 2025.*

Topics Covered: *Consolidation; rationalization; singular vs. distributional information; pre-mortem analysis.*

### Session 1 | Consolidating Fragmented Markets

- *Required preparation:*
  - Al-Najjar, N.I.: “*AutoMax’s Big Bet: Consolidating the U.S. Auto Retailing Industry*,” Kellogg School of Management, 2019.

### Session 2 | De-biasing Business Decisions: Premortem Analysis and the Outside View

- *Reading to pass out in class:*
  - Al-Najjar, N.I.: “*AutoMax’s Big Bet (B)*,” Kellogg School of Management, 2019.
- *Required Readings:* (Please read before class)
  - Gary Klein: “*Performing a Project Premortem*,” Harvard Business Review.
  - Koller, T., and Lovallo, D.: “Bias busters: Taking the “‘outside view’,” McKinsey Quarterly, September 2018.
- *Optional Readings:* (Cost overruns)
  - Flyvbjerg, B. et al.: “*Why Your IT Project May Be Riskier Than You Think*,” Harvard Business Review, 2011.
  - Flyvbjerg, B. et al.: “*Five things you should know about cost overrun*,” Transportation Research, 2018.

# Day 2

*Tuesday, March 4, 2025.*

Topics covered: *Wisdom of the crowd; prediction markets; herd behavior.*

## Mini-case Write-up 1 (Group)

### Session 3 | Wisdom of the Crowds

- *Required preparation:*
  - “*Wisdom of the Crowds*,” Kellogg School of Management.
- *Reading:*
  - Wolfers, J. and E. Zitzewitz: “*Prediction Markets*,” *Journal of Economic Perspectives*, 2004, vol. 18, pp. 107-26.

### Session 4 | Herd Behavior and Experts’ Incentives

- *Required preparation:*
  - Salmon, F.: “*The Formula that Killed Wall Street*,” *Wired Magazine*, February, 2009. (Winner of the *American Statistical Association’s* Excellence in Statistical Reporting Award.)
- *Optional Readings:*
  - Aral, S.: “*The Problem with Online Ratings*,” *MIT Sloan Management Review* Winter, 2014.
  - Lehrer, J.: “*Accept Defeat: The Neuroscience of Screwing Up*,” *Wired Magazine*, December 2009.
  - Enten, H.: “*Are Bad Pollsters Copying Good Pollsters?*,” *Fivethirtyeight.com*, August 11, 2014.
  - Silver, N.: “*Here is Proof Some Pollsters Are Putting a Thumb on the Scale*,” *Fivethirtyeight.com*, November 14, 2014.

# Day 3

*Wednesday, March 5, 2025.*

Topics covered: *Judo Strategies*. *Tipping points: network effects, contagion, and viral spread.*

## Mini-case Write-up 2 (Group)

### Session 5 | Network effects and Judo Strategies

- *Required preparation:*
  - Al-Najjar, N.I.: “*Microsoft in Thailand*,” Kellogg School of Management, 2011.

### Session 6 | Contagion, Extreme Events, and the Long-Tail

- *Readings–Extreme Events:*
  - Sunil Chopra and ManMohan Sodhi, “*Managing Risk to Avoid Supply-Chain Breakdown*,” Sloan Management Review, 2004.
- *Readings–Long Tail:*
  - Chris Anderson, “*The Long Tail*,” Wired Magazine, 2005.
  - Seth Levine: *Venture Outcomes are Even More Skewed Than You Think*, VCAdventure, August 12, 2014.
  - Anita Elberse, “*Should You Invest in the Long Tail?*” Harvard Business Review, 2008.

# Day 4

*Thursday, March 6, 2025.*

Topics covered: *Option value and risk aversion.*

## Session 7 | Option Value

- *Required preparation:*
  - Besanko, D.: *Exercise on Cost Uncertainty*, Kellogg School of Management.
- *Readings:*
  - A. Dixit and R. Pindyck: “*The Options Approach to Capital Investment*,” Harvard Business Review, 1995.
  - T. Horn, D. Lovallo, and S. Viguerie: “*Learning to Let Go: Making Better Exit Decisions*,” The McKinsey Quarterly, 2006.

## Session 8 | Risk Taking and Corporate Culture

- *Required preparation:* Please read this mini-case to familiarize yourself with the game and answer question 3:
  - Al-Najjar, N.I.: “*Deal or No Deal*,” Kellogg School of Management, 2011.
- Please skim this mini-case before coming to class:

Al-Najjar, N.I.: “*GSG 9*,” Kellogg School of Management, 2011.

# Day 5

*Friday, March 7, 2025.*

Topics covered: *Forecasting rare events.*

**Group project due**

## Session 9 | Near Misses

- *Required reading:*
  - Al-Najjar, N.: “*Blowout Preventers*,” Kellogg School of Management, 2017.  
A supporting spreadsheet will be available online.
- *Optional reading:*
  - Tinsley, C., R. Dillon, and P. Madsen: “*How to Avoid Catastrophe*,” Harvard Business Review, 2011, pp. 90-97.

## Session 10 | Group Presentations

Each presentation is 15 minutes (including questions and answers). Other details will be provided in class.

## EMBA 6013 4.0 Field Trip Japan – Tradition and Innovation

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

**2. Course Number:** EMBA 6013

**3. Credit Value:** 4.0

**4. Long Course Title:** Field Trip Japan – Tradition and Innovation

**5. Short Course Title:** Tradition and Innovation in Japan

**6. Effective Session:** Winter 2025

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

This course examines the transformation of the Japanese economy and its businesses. The online part develops an understanding of how Japan has been balancing tradition with innovation and change – insights that will be put to the test during a subsequent trip to the country, which includes firm visits as well as exchanges with thought leaders, think tanks, and government institutions.

**8. Expanded Course Description:**

The course examines the transformation needs of an entire nation – Japan, the third-largest economy in the world, its second-largest spender on R&D, and home of many globally respected companies such as Toyota, Honda, Denso, Sony, Hitachi, Sumitomo, Mitsubishi, NTT, Softbank. After its rise to a global economic leader in the late 1970s and early 1980s, Japan has experienced economic decline and stagnation, coping with major challenges, such as an ageing population. To understand modern Japan with its challenges and government policies, it is very important to understand its traditions. The online portion of the course will introduce students to the country's economy and business environment of as well as to its history and culture, showing how the ancient and unique cultural heritage strongly affects societal, political, and economic developments. It aims to develop an understanding of how Japan has been balancing tradition (heritage, culture, values) with innovation and change (new technologies, new business models) to overcome its challenges and to transform not only businesses, but its entire society to keep Japan among the leading nations in the world. These insights will be put to the test on the corresponding field trip, which visits the main industrial areas of Japan as well as the ancient city of Kyoto to explore and understand the history and cultural heritage of Japan. Program elements will include a mix of firm visits, exchanges with Japanese thought leaders from multiple backgrounds (business, politics, academia, entrepreneurs), meetings with key government institutions, other organizations, think tanks, and multiple cultural highlights such as visits to the most important temples, shrines, and other heritage sites in Japan.

**9. Course Learning Outcomes:**

Upon completion of the course, students will be able to:

- understand Japan's ancient and unique cultural heritage has strongly affected societal, political, and economic developments.
- distinguish between traditions that may be detrimental to innovation and others that can be a source of unique competitive advantage, even in the light of disruptive change.

- consider how Japan's ability to balancing tradition with innovation and change might be usefully employed in other parts of the world, facing similar challenges.

#### **10. Rationale:**

Japan is one of the richest countries and the third-largest economy in the world. It is also the world's second-largest spender on R&D, and home of many globally respected companies such as Toyota, Honda, Denso, Sony, Hitachi, Sumitomo, Mitsubishi, NTT, Softbank. After its rise to a global economic leader in the late 1970s and early 1980s, Japan has experienced economic decline and stagnation, coping with major challenges, such as an ageing population (which, e.g., causes a lack of qualified labour and the necessity to integrate immigrants into the workforce and society). In many ways, it therefore exemplifies the challenges currently or soon facing most advanced economies and their businesses. It should therefore be of interest to those of our students who want to understand possible ways of understanding and addressing these kinds of challenges in their own country. Since most courses no longer pay much attention to Japan, the immersive nature of the course, will allow them to familiarize themselves quickly and deeply with the Japanese case and the solution found there.

#### **11. Evaluation:**

Assessment will be based on a group assignment creating a short video portrait of a firm/organization that students will visit in Japan (50%) and an individual reflection essay about the most important experiences, lessons-learned and take-aways from the field trip (50%).

#### **12. Integrated Courses:**

NOT integrated

#### **13. Crosslisted Courses:**

NOT crosslisted

#### **14. Faculty Resources:**

This course is being offered as a global elective by our partner within the Kellogg EMBA Global Network, the Otto Beisheim School of Management at WHU in Vallendar, Germany. The program is directed by Professor Holger Ernst, Chair of Technology and Innovation at WHU, who will accompany the students during the entire trip.

#### **15. Physical Resources:**

The Otto Beisheim School of Management at WHU in Vallendar will organize all the necessary physical resources both in preparation for and during the field trip.

#### **16. Bibliography and Library Statement:**

Participants are asked to prepare by attending a kick-off session and an asynchronous pre-trip course before departure. All material will be made available to them via a program-specific WHU Moodle site, to which they will be given access before, during and after the trip, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

# MEMORANDUM

## York University Libraries

**To:** Matthias Kipping

**From:** Angie Liann, Teaching and Learning Librarian, Student Learning & Academic Success Department

**Date:** February 12, 2025

**Subject:** Library Statement of Support - Kellogg | Schulich EMBA: Exploring New Business Horizons

### Summary

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

### Collections

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

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

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

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

#### **Selection of Business Databases:**

- Mergent Intellect
- Marketline Advantage
- Statista
- Complete listing of databases available on [Business Databases A-Z webpage](#)

#### **Business Articles & Newspaper Collections:**

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

#### **eBook Platforms:**

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

## **Services**

#### **Library Instruction**

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

#### **Research Guides & eLearning Modules of Interest:**

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

- [Industry Research Guide](#)
- [Market Research Guide](#)
- [Country & International Business Information](#)

## **Research Help**

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

## **Accessibility Services**

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## Exploring New Business Horizons (Module 11)

### Field Trip Japan – Tradition and Innovation March 2025

The real voyage of discovery consists not in seeking new landscapes, but in having new eyes.  
— Marcel Proust

**Faculty:** Professor Holger Ernst (WHU)

Digital course work (self-paced): January - March 2025

Digital kick-off (zoom): **TBD**

Dates Field Trip: **March 9 - 14, 2025**

This alternative continues the innovation and transformation theme of Module 7 (“Creative Destruction”). It examines the transformation needs of an entire nation – Japan, the third-largest economy in the world, one of the richest countries, the world’s second-largest spender on R&D, and home of many globally respected companies such as Toyota, Honda, Denso, Sony, Hitachi, Sumitomo, Mitsubishi, NTT, Softbank.

The digital course will introduce students to the economy and business environment of Japan as well as to its history and culture. After its rise to a global economic leader in the late 1970s and early 1980s, Japan has experienced economic decline and stagnation, coping with major challenges, such as an ageing population (which, e.g., causes a lack of qualified labor and the necessity to integrate immigrants into the workforce and society). To understand modern Japan with its challenges and government policies, it is very important to understand its traditions. The ancient and unique cultural heritage strongly affects societal, political, and economic developments. Intuitively, strong traditions may be detrimental to innovation and change. Could they also be a source of unique competitive advantage, even in the light of disruptive change? The digital course aims to develop an understanding of how Japan has been balancing tradition (heritage, culture, values) with innovation and change (new technologies, new business models) to overcome its challenges and to transform not only businesses, but its entire society to keep Japan on top of the leading nations in the world.

The learning outcomes will be put to a test on the corresponding field trip. We will visit the main industrial areas of Japan as well as the ancient city of Kyoto to explore and understand the history and cultural heritage of Japan. Program elements will include a mix of firm visits, exchanges with Japanese thought leaders from multiple backgrounds (business, politics, academia, entrepreneurs), meetings with key government institutions, other organizations, think tanks, and multiple cultural highlights such as visits to the most important temples, shrines, and other heritage sites in Japan.

**Expected contribution**

- Attend kick-off session on zoom (online)
- Pass pre-trip course (asynchronous)
- Meaningful participation and contributions during the field trip

**Organized and provided by EMBA program**

- Accommodation
- Welcome and farewell dinner
- Breakfast and most lunches as indicated in the schedule
- Company visits
- Cultural sites
- Ground transportation (except to and from airport)

**Paid by Students:**

- Air fare to Japan
- Ground transportation airport to hotel and return
- Non-organized lunches and dinners
- Incidental costs on hotel bill
- Extra events
- Visa costs (if required)



## **Assignments Kellogg/WHU EMBA Global Field Trip Japan 2024**

Professor Dr. Holger Ernst

### **(1) Group Assignment (50 points): Company Portrait (Prior to the field trip)**

#### **Instructions for the group assignment:**

- Create a short video (5 to max. 10 minutes) with a portrait of the firm/organization we will visit in Japan. The portrait should include basic information such as name, location(s), size, key financial data, industry sector etc. It should also include, if available, more specific and detailed information and analyses such as strategy, challenges (firm, industry), history and important milestones, recent and bigger changes or initiatives, organizational structure and leadership team, global footprint, main competitors etc.

Important: These are just some guidelines; it is expected that you add important points (your judgement) and that you customize the portrait to your specific firm/organization. Research beyond the Wikipedia page (if available) is certainly required!

For some firms, you find less information. That is ok. Some information is in Japanese. Find a solution (use translation tools such as Google translate)

The specific firm will be randomly assigned to each group. Groups will be informed about their firm or organization via Moodle on January 26<sup>th</sup>, 2024.

- You are free to design the video as you like. Please make sure that critical content and data are presented in a way that can be understood by the audience. The videos will be available to all groups before the actual trip to Japan.
- You find some ideas for video formats and best practices here: <https://www.wordstream.com/blog/ws/2014/03/13/explainer-videos>. These are just suggestions, you are free to use your own style and creativity!
- Please submit your video via moodle latest by February 26th, 2024, 8.00 pm (CET).



## **(2) Individual Assignment (50 points): Reflection Essay (During and after the field trip)**

### **Instructions for the individual assignment (essay):**

- Please write an essay about your most important experiences, lessons-learned and take-aways from the field trip to Japan. Please indicate what you found most valuable, insightful, confirming (your prior view about Japan) or surprising from your own personal perspective. Please also comment on which opportunities and challenges you see from your own company background when it comes to do or to expand your business in Japan.
- Essays will be checked for plagiarism. Plagiarism is a breach of WHU's Honor Code and will be penalized. If you do, make sure that you cite according to scientific standards. If you have any questions, pls. contact Prof. Ernst.
- Formatting: Times New Roman 12pt or Arial 11pt, at least 1.2 spaced. Please include a title page with your name.
- Required length: 5 pages (excluding title page)
- Please submit your essay as a PDF via Moodle latest by March 31st, 2024, 8.00 pm (CET).

### **(3) Contact Details Prof. Ernst for Questions**

In case you have any questions, please e-mail me under [holger.ernst@whu.edu](mailto:holger.ernst@whu.edu). We can also set up individual Zoom or Teams calls in case they are required any time.

Good luck and see you in Tokyo!

Holger

## EMBA 6014 2.0: FinTech and Society

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

2. **Course Number:** EMBA 6014

3. **Credit Value:** 2.0

4. **Long Course Title:** FinTech and Society

5. **Short Course Title:** FinTech and Society

6. **Effective Session:** Winter 2025

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

This course explores opportunities and challenges at the intersection of finance, technology, and regulation, resulting from recent changes in financial intermediation. Participants are introduced to tools that evaluate the profitability of innovation in this space from the perspective of the financial product markets, competition, regulation, and funding, and examine the role that technology plays in overcoming challenges faced by incumbents.

8. **Expanded Course Description:**

This course studies financial intermediation focusing on innovation and entrepreneurship. Today, disruptive and lightly regulated technology entrants (FinTechs) compete with traditional banks in every aspect of their business. They are innovating existing products, and launching financial products that had not existed before. For some maturing entrants, the change has come full circle: they have become banks. This course explores the opportunities and challenges at the intersection of finance, technology, and regulation, and assesses their impact on business and broader society. It aims to develop an understanding of the broad landscape of FinTech and banking: disruptive technology innovations such as machine learning and generative AI as well as regulatory arbitrage in the areas of real estate, asset management, payments, and lending to businesses and households as well as the use of blockchain technology for cryptocurrencies and DeFi. The course proposes tools that can be used to evaluate the profitability of innovation in the financial intermediation space from the perspective of the financial product markets, competition, regulation, and funding, and the role that technology plays in overcoming challenges faced by incumbents.

9. **Course Learning Outcomes:**

Upon completion of the course, students will be able to:

- Understand why financial intermediaries – banks, non-banks, and FinTechs – exist, how they make money, and what their impact is on society.
- Understand the current banking and FinTech landscape.
- Evaluate future FinTech opportunities from the perspective of business and society.
- Gain a broader understanding of discrimination in the provision of financial intermediary services, and how algorithms can alleviate or exacerbate the problem.

**10. Rationale:**

Since the Great Recession there have been dramatic changes in financial intermediation, in particular through the application of information technologies. There are now large numbers of innovative entrants, so called FinTechs, that compete with traditional banks in every aspect of their business, while being only lightly regulated. Their potential impact both on the financial services sector and the economy and society at large remains unclear. Given the speed and scope of these developments, there should be significant interest among our students that currently work or planning to work in the financial and technology sectors as well as those monitoring these developments and their broader impact in an official, regulatory capacity or from a broader societal perspectives, for instance as part of consumer watchdogs.

**11. Evaluation:**

Assessment for this course is entirely individual and consists of (i) class prep surveys of the compulsory cases and readings; (ii) a research paper summary, addressed at the CEO of a traditional bank or a FinTech; and (iii) class participation. Each of them accounts for one third of the overall course grade.

**12. Integrated Courses:**

NOT integrated

**13. Crosslisted Courses:**

NOT crosslisted

**14. Faculty Resources:**

This course is being offered by our partner, the Kellogg School of Management at Northwestern University. It is taught by Professor Gregor Matvos, who holds a PhD in Business Economics from Harvard University and is currently the Howard Berolzheimer Chair in Finance at Kellogg. He is also a Research Associate at the National Bureau of Economic Research and serves as an Editor of *The Review of Financial Studies*.

**15. Physical Resources:**

Classes for this course will be held over 5 intensive days on Kellogg's Miami campus.

**16. Bibliography and Library Statement:**

All the case studies and readings for the course are posted on the Kellogg Canvas site, to which our students will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

# MEMORANDUM

## York University Libraries

**To:** Matthias Kipping

**From:** Angie Liann, Teaching and Learning Librarian, Student Learning & Academic Success Department

**Date:** February 6, 2025

**Subject:** Library Statement of Support - Kellogg | Schulich EMBA: Fintech and Society

### Summary

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

### Collections

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

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

However, the Omni single-search interface provides students with access to a wide range of remote materials, including eBooks, book chapters, articles, dissertations, streaming media, etc.

that students may wish to consult, especially when completing the major research paper assignment for the course. Library users may also request items from partner libraries through Omni.

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#### **Selection of Business Databases:**

- Mergent Intellect
- Marketline Advantage
- Statista
- Complete listing of databases available on [Business Databases A-Z webpage](#)

#### **Business Articles & Newspaper Collections:**

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

#### **eBook Platforms:**

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

## **Services**

#### **Library Instruction**

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

#### **Research Guides & eLearning Modules of Interest:**

- [EMBA Program: Self-Paced Library Research Module](#)
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**NORTHWESTERN UNIVERSITY**  
**Kellogg School of Management**

**Proposed Course Title: FinTech and Society**

Professor Gregor Matvos  
gregor.matvos@kellogg.northwestern.edu

**Course Syllabus**

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**Course Description**

FinTech and Society studies financial intermediation (banking) with a focus on innovation and entrepreneurship. Financial intermediation has continued to undergo dramatic changes since the Great Recession. Disruptive and lightly regulated technology entrants (FinTechs) compete with traditional banks in every aspect of their business, by innovating within the space of existing products, and by launching financial products that had not existed before. For some maturing entrants, the change has come full circle: they have become banks. This course explores the opportunities and challenges at the intersection of finance, technology, and regulation, and assesses their impact on business and broader society. We aim to develop an understanding of the broad landscape of FinTech and banking: disruptive technology innovations such as machine learning and generative AI as well as regulatory arbitrage in the areas of real estate, asset management, payments, and lending to businesses and households as well as the use of blockchain technology for cryptocurrencies and DeFi.

The course aims to develop tools used to evaluate the profitability of innovation in the financial intermediation space from the perspective of the financial product markets, competition, regulation, and funding, and the role that technology plays in overcoming challenges faced by incumbents.

**Course Goals:**

The main goals from this course are:

- 1) Understand why financial intermediaries—banks, non-banks, and FinTechs—exist, how they make money, and what is their impact on society.
- 2) Understanding the current banking and FinTech landscape.
- 3) Evaluate future FinTech opportunities from the perspective of business and society.
  - What is the consumer need that the FinTech addresses?
  - Why were these issues not addressed by the existing industry? Is the disruption technological, regulatory, or are there other frictions being resolved?
  - What are the funding sources for the opportunity?
  - What is the role of FinTech in promoting financial inclusion – access to cheap and efficient financial services to the underbanked population?
- 4) Broader understanding of discrimination in the provision of financial intermediary services, and how algorithms can alleviate or exacerbate the problem.

**Grading**

Class will consist of lectures and cases. Grades will be based on case “Class prep Surveys,” class participation, and research paper summaries.

1. **Class Prep Surveys:** The purpose of the surveys is to get everyone to read the cases and engage with the material. Therefore, they are graded on a pass / fail basis. They are due on the date of the discussion prior to class.

2. **Research paper summaries: DUE 1 Week after final class, April 12, 11:59pm ET.** You may choose any research paper listed for your graded summary (no more than two pages, one page or less is fine). Sign up is first-come, first-served. This assignment is individually graded. Write your summary as if you are employed at a Fintech firm or a traditional competitor and you are summarizing the article for the CEO of your firm. What is the executive summary/key takeaways? Is there a key table to summarize the findings from? What are the implications for your industry, firm, or society as a whole? The last part is critical to your grade. Be specific about the implications: who are you writing for, what concrete steps do you propose etc.

Grading: Class Prep Surveys 1/3, research paper summary 1/3, Class participation 1/3.

**Attendance:**

**First class mandatory.** You need to attend the first class to stay enrolled.

**Use of Generative AI:**

Students are allowed to use generative AI for all assignments in any manner. Any use of generative AI should be accompanied by a disclosure at the end of an assignment explaining (1) what you used AI for; (2) the specific tool you used; and (3) what prompts you used to get the results.

**Honor code**

All students enrolled in a course offered by the Kellogg School of Management agree to abide by the Kellogg Honor Code. You can find the honor code at <https://www.kellogg.northwestern.edu/policies/honor-code.aspx>. If you are in doubt about whether something is acceptable under the honor code, please do not hesitate to ask me.

**Classroom etiquette**

Kellogg has established a series of guidelines to make sure that the classroom environment enhances the learning experience for all students. Please take the time to familiarize yourself with the Classroom Etiquette code. <https://www.kellogg.northwestern.edu/policies/etiquette.aspx>

**Course materials**

Unauthorized copying or distribution of any course materials is strictly prohibited.

**Help outside of classroom.**

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

**Changes to syllabus**

Please note that the specifics of this course syllabus are subject to change in the case of unforeseen circumstances. Instructors will notify students of any changes as soon as possible. Students will be responsible for abiding by the changes.

**Proposed Course Outline (Subject to change to accommodate new developments in FinTech Space):**

<b>Day</b>	<b>TOPIC</b>	<b>Before Class: Due</b>	<b>In Class</b>	<b>After Class: To Do</b>
<b>1</b>	Disrupting Banking		<i>Lecture:</i> Disrupting Banking	<i>Prepare:</i> "SoFi: A Journey Towards Reintermediation"
<b>2</b>	Disrupting Banking	<i>Submit class prep survey:</i> "SoFi: A Journey Towards Reintermediation"	<i>Case Discussion:</i> "SoFi: A Journey Towards Reintermediation"  <i>Lecture:</i> Buy Now Pay Later (BNPL)	
<b>3</b>	Blockchain and Crypto		<i>Lecture:</i> Intro to Blockchain and Crypto  <i>Lecture:</i> Crypto Applications (stablecoins and tokenization)	<i>Prepare:</i> "Facebook's Libra: The Privatization of Money?"
<b>4</b>	Payments	<i>Submit class prep survey:</i> "Facebook's Libra: The Privatization of Money?"	<i>Case Discussion:</i> Libra  <i>Lecture:</i> Payments	<i>Prepare:</i> "Zillow Offers: Winning Online Real Estate 2.0"
<b>5</b>	Real Estate	<i>Submit class prep survey:</i> "Zillow Offers: Winning Online Real Estate 2.0"	<i>Case Discussion:</i> Zillow Offers  <i>Lecture:</i> Real Estate	
<b>FINAL DELIVERABLE: Research Report</b>				

## EMBA 6016 4.0: Value Creation and Capture in Chinese Healthcare

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

2. **Course Number:** EMBA 6016

3. **Credit Value:** 4.0

4. **Long Course Title:** Value Creation and Capture in Chinese Healthcare

5. **Short Course Title:** Chinese Healthcare Market

6. **Effective Session:** Winter 2025

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

This course is designed to prepare future business decisionmakers in healthcare to interact with the Chinese healthcare market, which is the second largest in the world and has become a source of innovation in biopharmaceuticals, medical devices, and digital health. It combines in class case and lecture-based learning, guest lectures by leading practitioners, and many networking and cultural immersion opportunities.

8. **Expanded Course Description:**

Surpassing approximately 10 trillion yuan (\$1.4 trillion) in 2021, the Chinese Healthcare market ranks as the second largest in the world, with recent growth driven by a rapid expansion of the share of the public covered by basic medical insurance as well as an increase in the types of technologies that are covered. Moreover, China is rapidly becoming a source of innovation in biopharmaceuticals, medical devices, and digital health. It is now clear that any healthcare decision maker over the next several decades will need to have an understanding of this market and its role in the global healthcare ecosystem. The sheer scope of the market combined with the complexity of healthcare and an active government interested in domestic production requires a careful consideration of the sources of value creation and capture in this market. To prepare future business decisionmakers in healthcare to interact with the Chinese market, the course combines in class case and lecture-based learning, leading practitioner guest lectures, a breadth of networking opportunities, and cultural immersion opportunities.

9. **Course Learning Outcomes:**

Upon completion of the course, students will be able to:

- understand the specificities of the Chinese healthcare market system in comparison to other systems in both developed and developing markets;
- identify the sources of value creation and capture in a context marked by a large scoped, significant complexities, and an active government interest.
- discern the areas in which the growing number of innovations originating in the Chinese health care market can be applied elsewhere, and how they might need to be adapted.
- consider and evaluate possible partnerships between participants in the Chinese and those in global healthcare ecosystems.

**10. Rationale:**

Every year we have a few students from the healthcare sector in the program, coming from both medical and business backgrounds. They have so far been able to join courses offered by Kellogg, our partner in the Global EMBA Network, looking in depth at the healthcare system in the US. Kellogg is now offering this new course on the Chinese healthcare market, which has become the second largest in the world as well as a supplier of innovative medical devices and biopharmaceuticals and an emerging leader in digital health. This course should therefore be of great interest to these students, not only because of the growth and size of the Chinese market but also because in a number of aspects it might be more relevant for the Canadian context than the US healthcare system.

**11. Evaluation:**

Assessment is based on (i) 2-4-page memo about the Chinese healthcare market (15%); (ii) class participation (15%); (iii) preparatory questions and their rationale for at least 4 of the invited speakers (30%); (iv) a final group project consisting of a 10-page paper analysing a foreign firm wanting to enter the Chinese healthcare market or a Chinese firm trying to commercialize a product or service abroad (40%).

**12. Integrated Courses:**

NOT integrated

**13. Crosslisted Courses:**

NOT crosslisted

**14. Faculty Resources:**

This course is being offered by our partner, the Kellogg School of Management of Northwestern University. It is taught by Professor Craig Garthwaite, who is the Herman R. Smith Research Professor in Hospital and Health Services, a Professor of Strategy, and the Director of the Program on Healthcare at Kellogg (HCAK). He is an applied economist whose research examines the business of healthcare with a focus on the interaction between private firms and public policies. Prior to his PhD, he served in a variety of public policy positions.

**15. Physical Resources:**

Classes for this course will be held over one week in Shanghai, with resources organized through the Kellogg School of Management (if needed in conjunction with our local partner, the Guanghua School of Management of Peking University).

**16. Bibliography and Library Statement:**

All the pre-readings as well as the case studies for the various class sessions are posted on the Kellogg Canvas site, to which our students will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

# Northwestern | Kellogg

## **HCAK 973** **Value Creation and Capture in Chinese Healthcare** Spring 2025 Syllabus

*Professor Craig Garthwaite*

4231 Global Hub

(847) 491-2509

e-mail: [c-garthwaite@kellogg.northwestern.edu](mailto:c-garthwaite@kellogg.northwestern.edu)

## **COURSE OVERVIEW AND OBJECTIVES**

Surpassing approximately 10 trillion yuan (\$1.4 trillion) in 2021, the Chinese Healthcare market ranks as the second largest in the world. The recent growth in this market is driven by a rapid expansion of the share of the public covered by basic medical insurance as well as an increase in the types of technologies that are covered.

Beyond simply emerging as a dominant consumer of healthcare technology, China is rapidly becoming a source of innovation in biopharmaceuticals, medical devices, and digital health. What was once a market or either “me-too” or at times “me -worse” technology has evolved into a supplier of cutting-edge medical solutions. Some of these solutions are targeted at specific nuances of the Chinese market while others will generate value globally.

It is now clear that any healthcare decision maker over the next several decades will need to have an understanding of this market and its role in the global healthcare ecosystem. It is also clear that success in the Chinese market will not be achieved by simply applying modified versions of global strategies. The sheer scope of the market combined with the complexity of healthcare and an active government interested in domestic production requires a careful consideration of the sources of value creation and capture in this market.

In addition, managers in domestic Chinese firms need to more broadly understand the needs of other global healthcare markets and how their technologies can be used to create and capture global value. Absent that understanding, domestic firms are unlikely to be able to optimally structure the investments and partnerships with global firms.

Kellogg’s “Deep Dive: Chinese Healthcare Market” combines in class case and lecture-based learning, leading practitioner guest lectures, a breadth of networking opportunities, and cultural immersion opportunities designed to prepare future business decisionmakers in healthcare to interact with the Chinese market.

## COURSE OVERVIEW AND OBJECTIVES

### **Individual China health system analysis (15%)**

Each student must submit an individual assignment that applies the frameworks for analyzing a developing market healthcare system to the Chinese market. Students should use the framework presented in “Health Systems in the Developing World” case assigned in the pre-readings along with outside research that you conduct on the specifics of the Chinese market. I have also provided a set of readings that give a background of the system, but this should not be the total of your work. The deliverable is a 2-4 page memo describing the students analysis of this market. **This deliverable is due on March 22.**

### **Interview questions and guiding rationales for guest lecturers (30%)**

A meaningful portion of this course is to expose you to leaders at the forefront of the business of healthcare in the Chinese market. For that reason, a large portion of the course involves presentations and discussions with these practitioners. In order to maximize the learning opportunities for these course sessions, a primary assignment for the course is the preparation of a series of “interview” questions for each speaker.

Specifically, for **AT LEAST FOUR SPEAKERS** listed below you are required to submit at least three interview questions about the firm and or market in which the individual works. **These questions of due the evening before the session in which that speaker appears.** For each question you must also submit a 1-2 paragraph discussion as to what specific features of the firm or market are driving you to ask the questions. This will require both a careful reading of the course material for the day and some outside research into the firm.

#### Speakers for this assignment include:

- Tom Sze, New Frontier and Jeff Staples, Swire [3 questions total, with at least 1 for each speaker]
- Tim Lee, ZS Associates
- Jason Wang, Mindray
- William Tong, AstraZeneca
- Matt Yang, Alibaba Health
- Frank Jiang, Hengrui Pharma

### **Participation (15%)**

The class participation grade provides you with an *added* incentive to prepare for class—the value of your own learning should be the primary incentive. Case discussions work well as learning tools when everyone participates.

Your participation will be graded on quality, not volume. You should provide insights, observations, inferences, or conclusions that not only express your viewpoint, but *also* defend your analysis. Your comment should be relevant to the topic at hand, and should advance the discussion. A simple opinion or viewpoint is not very valuable without any justification. Comments that respond to, elaborate on, lend support to, contradict, or correct a comment by one of your classmates are valued. Counter-productive comments include opinions without a justifying argument, pure repetition of previous point, and rambling, vacuous or disparaging comment.

Discussion constitutes a large portion of our class time; you will have ample opportunity to participate. We will cold call in class, both to give you an incentive to prepare for class, and to make sure the class discussion does not collapse to a handful of students.

### **Final Group Project (40%)**

The final deliverable for the course is a group project consisting of a 10 page analysis (exclusive a figures and exhibits) that presents a market analysis for an international firm attempting to enter the Chinese healthcare market or a firm attempting to commercialize a product or service out of the Chinese market.

During the week that we are in China, students must **form their groups for this project by the morning of Thursday March 27<sup>th</sup>**. Groups can have **no more than six members**. Before the end of our **last session on Friday March 28<sup>th</sup>**, each group must submit the members of their group and the name of the firm that will serve as the basis of the project.

By **April 14<sup>th</sup>**, each group must submit a **detailed one page outline** of their project. This outline will receive feedback and is worth 15 percent of the grade.

The final project will be **due by 12:00pm at May 5, 2025** and is worth an additional 25 percent of your grade.

Students will be expected to combined research with primary case interviews based on contacts developed throughout the trip.

## Background Pre-Readings

- “Health Systems in the Developing World” (316112-PDF-ENG)

### Background Reading

*Note: The readings below are a set of articles that I gathered that provide some overall background about the Chinese healthcare system. They range from broad overviews of the system more specific deep dives into current areas of interest. We will not explicitly be having any case like conversations about these articles, but to get the most out of the class and the trip to Shanghai it is expected that you are broadly familiar with these issues.*

- Winnie Yip, Hongqiao Fu, Weiyan Jian, Jue Liu, Jay Pan, Duo Xu, Hanmo Yang, Tiemin Zhai, “Universal health coverage in China part 1: progress and gaps,” *The Lancet*, December 2023.
- Winnie Yip, Hongqiao Fu, Weiyan Jian, Jue Liu, Jay Pan, Duo Xu, Hanmo Yang, Tiemin Zhai, “Universal health coverage in China part 2: addressing challenges and recommendations,” *The Lancet*, December 2023.
- I. Schrader, “China’s Healthcare System Needs a Check-up,” *The Wire*, July 16, 2023.
- International Healthcare System Profiles: China, *Commonwealth Fund*, June 5, 2020.
- China Health Ecosystem 2030: A Scenarios Analysis, *Deloitte*
- X. Tan, Y. Zhang, H. Shao, “Healthy China 2030, a breakthrough for improving health,” 2018, *Global Health Promotion* 1757-9759; Vol 26(4): 96–99.
- X. Wen and D. Jia,” In Depth: How a Greying China is Challenging the Healthcare System, *Caixin Global*, March 22, 2024.
- K. Northrop, “A Crackdown Comes for Healthcare,” *The Wire*, February 11, 2024.
- “Rewiring the bridges to innovation,” *McKinsey*, November 17, 2024.
- “Asia biopharma innovation - on the cusp of a new era?,” *McKinsey*, March, 2024.
- R. Cheung, “Big Pharma Doubles Down on China,” *The Wire*, November 3, 2024.
- R. Cheung, “China’s Ozempic Test,” *The Wire*, August 4, 2024.

**Monday, March 24, 2025**

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**Introduction to the Chinese Healthcare Sector**

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**8:00am – 10:30am**

**GUEST LECTURER**



**Helen Chen is Global Sector Co-Head for Healthcare and a Greater China Managing Partner of L.E.K. Consulting** based in Shanghai. Helen was a member of L.E.K.'s Global Leadership Team from 2012 to 2016. She is also a Director of the firm's [Asia-Pacific Life Sciences Centre of Excellence](#). Helen was named one of Consulting magazine's Global Leaders in Consulting in 2019.

**11:00pm - 12:00pm**

- Kelly Ke “Closing the Affordability Gap: Can China’s Commercial Health Insurance Deliver?,” Jan 17, 2024.
- Xu Wen, Zhao Jinzhao and Guo Xin, “In Depth: Shanghai’s Struggle to Unclog Its Hospitals,” *Caixin Global*, Nov 17, 2024.
- Winnie Yip, Hongqiao Fu, Weiyan Jian, Jue Liu, Jay Pan, Duo Xu, Hanmo Yang, Tiemin Zhai, “Universal health coverage in China part 1: progress and gaps,” *The Lancet*, December 2023.
- Winnie Yip, Hongqiao Fu, Weiyan Jian, Jue Liu, Jay Pan, Duo Xu, Hanmo Yang, Tiemin Zhai, “Universal health coverage in China part 2: addressing challenges and recommendations,” *The Lancet*, December 2023.

## Monday, March 24 2025 (Cont.)

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### Private Healthcare Services in the Chinese Market

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Monday, March 24: 2:00pm - 5:30pm

#### Required Readings

- Carl Wu – Dream Big, Stay Humble, December 13, 2023.
- E. Cheung, “How can mainland China’s health care be improved? Hong Kong’s former finance minister thinks he has the answer,” SCMP, 14 August, 2017
- P. Sito, “Swire Pacific invests in new Shenzhen private hospital as part of strategy to tap ‘robust’ consumer spending in mainland China,” *South China Morning Post*, 20 March 2021.
- Podcast: China Field Notes: [40 Years in the Chinese Medical System: United Family Healthcare Founder Roberta Lipson](#)

#### GUEST LECTURERS



**Mr. Tom Sze** is a Managing Director and Co-COO - New Frontier Group. Prior to joining New Frontier, Tom was an Investment Professional at Viking Global Investors. Prior to Viking, Tom was at Blackstone’s Private Equity Group in Hong Kong. He was one of the earlier members of the Blackstone Asia team, where he led and executed a number of investments in China, Korea, South East Asia and Australia. Prior to Hong Kong, Tom worked at Francisco Partners and McKinsey in San Francisco



**Dr. Jeff Staples** is the Managing Director for Healthcare at Swire. Dr. Staples is an accomplished results-focused health system executive with nearly 20 years of turn-around management and organizational leadership in Southeast Asia, the Middle East, and China, including acute care hospitals, academic medical centers, and ambulatory care centers. With a proven track record of driving shareholder value while simultaneously improving clinical quality and patient experience, Dr. Staples has led two \$1+ Billion transactions, including a \$1 Billion IPO on the London Stock Exchange (2013) and a \$1.4 Billion listing on the New York Stock Exchange (2019), via a SPAC-based exit.

## Tuesday March 25, 2025

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### China Medical Device Sector

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#### 8:00am- 10:00am

- T. Lee and T. Zhao, “How Volume Based Procurement is redefining medtech go to market strategies,” *ZS Associates*
- J. Tian, W. Wei, K. Wu, and D. Zurkiya, “Upgrading medtech commercial operations in China,” *McKinsey and Co., March 2023*.
- S. Ong, “China’s Medical Device Industry Gets a Makeover,” *21 March 2024, Nature*.

#### GUEST LECTURER



**Tim Lee is an Associate Principal at ZS Associates.** He currently leads the medtech industry vertical for ZS in China. He works from the global headquarters as well as local affiliates of ZS’s medtech clients to drive growth by ensuring their commercial strategy and organization is equipped to navigate the China market’s dynamic regulatory, clinical and competitive environment. In addition to his consulting experience, Tim held various sales and marketing positions at BD, and he was responsible for the portfolio and branding integration of infusion disposables as the head of marketing for BD’s intravenous access and interventional specialties business during CareFusion’s integration with BD. Tim holds a B.A. and M.B.A. from Northwestern University.

#### 10:30am – 12:30pm



**Jason Wang is the Director of International Public Affairs, Mindray Medical/Shenzhen Mindray Bio-Medical Electronics Co.,Ltd**

- Iris Ouyang, “Coronavirus: Mindray’s medical devices flew off the shelves amid Covid-19. Now Li Xiting says company’s growth is just starting,” *South China Morning Post*, 5 June 2021.
- MINDRAY MEDICAL INTERNATIONAL LIMITED: GOING GLOBAL FROM CHINA (IN1210-PDF-ENG)

## Tuesday March 25, 2025 (Cont.)

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### Managing Innovation in a Global Market: GE Healthcare in China

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**12:30pm – 1:30pm**

*Lunch and Discussion with James Deng, Becton Dickinson*

- Han Jingyan, “Med-tech 'Big Man' confident in Chinese market,” *China Daily*, Dec 20, 2024.
- Zhou Wenting, “US medical tech company BD sees 'no end' to expanding biz, innovation in Chinese market,” *China Daily*, Jul 20, 2023.



**James Deng is the Senior Vice President and General Manager of Greater China for Becton Dickinson.** He has a demonstrated history of working in the medical device industry. He has been with BD since 2011. Prior to that role, Deng spent 16 years with Novartis with roles in both China and the United States. He is a strong operations professional that graduated from Zhejiang University (medical school), CEIBS and Harvard Business School.

## Tuesday March 25, 2025 (Cont.)

2:00 – 5:00pm

- GE CHINA TECHNOLOGY CENTER: EVOLVING ROLE IN GLOBAL INNOVATION (W15468-PDF-ENG)



*GE China Technology Center at Shanghai's Zhangjiang Hi-Tech Park.*



**Yihao Zhang is the President and CEO of GE Healthcare China** and is responsible for the company's strategic development and business operations in the China market. As a leading global med-tech and diagnostics innovator, GE Healthcare has been operating in China over 40 years, where it now has 7,000 employees and five manufacturing sites. Prior to joining GE, Mr. Zhang was Senior Vice President for Danaher Dental Platform and President for China & APAC, responsible for the overall business strategy and performance of three operating companies – Kavo Kerr,Ormco and Nobel Biocare – in China & APAC. He successfully led Danaher Dental's China localization efforts in R&D, manufacturing, business development and talent management.

He has also held a variety of leadership positions for Fluke, the Danaher Tool Group and Danaher Dental Platform, with experience across sales, marketing, supply chain, product and general management. Mr. Zhang began his career in finance with TRW in the US and Canada and has also worked for P&G in brand management in the US. Mr. Zhang holds a bachelor's degree in Mathematics/Economics from Ohio Wesleyan University, an MBA from Kellogg School of Management, Northwestern University, and a master's degree in Engineering Management from McCormick School of Engineering, Northwestern University.

## Wednesday March 26, 2025

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### Commercializing Pharmaceuticals in the Chinese Market

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#### General readings on China as a market for Pharmaceuticals

- J. Wang, “China Market Opportunities for International Pharmas,” LEK Consulting, 2023.
- R. Cheung, “China’s Ozempic Test,” *The Wire*, August 4, 2024.
- R. Cheung, “Big Pharma Doubles Down on China,” *The Wire*, November 3, 2024.

#### 8:00am- 10:30am

#### Astra-Zeneca in China

- N. Zamiska, “AstraZeneca Looks Beyond Beijing,” *Wall Street Journal*, Jun 13, 2008
- H. Kuchler and E. Olcott, “AstraZeneca defies geopolitics to bet on China,” *Financial Times*, June 3, 2023.

#### GUEST LECTURER



**William TONG – Associate Vice President, COPD, Astra Zeneca China.**

#### 10:45- 12:00 – Beigene?

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### A Novel Product Launch in China: Eisai’s Leqembi

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- Reuters, “Eisai and Biogen launch Alzheimer's drug Leqembi in China,” June 28, 2024.



**Feng Yanhui, President of Eisai China**

**Thursday, March 27, 2025**

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**Digital Healthcare in China**

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**8:00am – 11:30am**

*Readings*

- HAODF: THE PIONEER OF ONLINE HEALTHCARE IN CHINA (W19602-PDF-ENG)
- TRANSLATED READINGS FROM MATT

*GUEST LECTURER*



**Matthew Yang is the Chief Investment Officer at Alibaba Health**, a position that he has held since 2023. In this role, Yang oversees a portfolio for more than 15 billion RMB across 50 companies and serves on the Board of Directors for over 20 firms. Prior to this role, Yang as a Managing Director at Alibaba Group Strategic investment. He has also served as a Principal at CPE – a leading Chinese Private Equity Fund. He received his MBA from the Kellogg School of Management and an undergraduate degree from Nankai University.

**Public Hospital Visit (2:00-5:00)**

ZHONGSHAN HOSPITAL AFFILIATED TO FUDAN UNIVERSITY: WHERE SMART HEALTH MEETS THE FUTURE (CB0287-PDF-ENG)

**Friday, March 28, 2025**

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**Outlicensing Products from the Chinese Market**

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**8:00am – 10:00am**

- G. McGregor, “The Biotech Urban Legend,” *The Wire*, July 23, 2023.
- H. Kuchler, “GSK on hunt for drug deals in China,” *The Financial Times*, December 16, 2023.
- C. Leong, “Big Pharma Bets Big on China,” *Wall Street Journal*, July 23, 2023.

**GUEST LECTURERS**



**Franck Le Deu is a leader of McKinsey’s Life Sciences Practice in China** and works with companies across Asia on commercial topics. His main focus is marketing & sales strategy, including brand strategy, product launch, organization, and commercial transformation. Franck has also worked closely with senior clients on a number of high-profile mergers and acquisitions. He is a frequent speaker at leading industry conferences in China, including the BioCentury Healthcare Summit and the PhRMA Innovation Summit.



**Fangning Zhang is a leader of McKinsey’s Pharmaceuticals & Medical Products Practice in Greater China** and for the last 14 years has served pharmaceutical and medtech companies on topics related to business strategy, R&D, medical affairs, organization, and transformation. Fangning’s broad network includes leaders from multinational and local companies, and she hosts regular executive roundtables for China’s R&D and biotech leaders. She is also a regular speaker at leading healthcare conferences in China. She spent several years spearheading efforts to establish a drug-innovation index and has written about innovative topics in the medtech and pharmaceutical industries. She earned her MBA in marketing and strategy from Kellogg School of Business.

## Friday, March 28, 2025 (cont.)

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### The CRO Market in China

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10:30am – 12:00pm

- E. Chen, “Wuxi Waylaid,” *The Wire*, August 25, 2024.



**Steven Yang is the Co-CEO of Wuxi-Apptec.** He is a pharmaceutical industry leader recognized for building R&D and service capabilities, delivering research and early development portfolios of drug candidates, and establishing R&D partnerships in US, Europe, China and other Asian and emerging markets. Before joining WuXi, Dr. Yang was Vice President and Head of Asia and Emerging Markets iMed at AstraZeneca, and served as Vice President and Head of Asia R&D at Pfizer and as Executive Director and head of Pfizer's global R&D strategic management group. Dr. Yang received his PhD in Pharmaceutical Chemistry from the University of California, San Francisco.

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### Lunch Panel: Perspectives on China's Pharmaceutical Venture Capital Market

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12:15-2:15



**Kevin Chen is the founding partner of BioTrack Capital** and has spent over 21 years in healthcare as a scientist, entrepreneur and healthcare investor. Prior to founding BioTrack, Kevin was Healthcare Partner at Sequoia China where he led Sequoia China's investment in healthcare. Before that he was the Head of Everbright's first ever healthcare fund. At Sequoia and Everbright, Mr. Chen led investments in over 20 leading healthcare companies in China including BGI, Betta Pharma, Amcare, Venus Medical, Zai Lab, Yuwell and We-Doctor. Kevin holds an MBA from Kellogg, a master's degree in Medicinal Chemistry & Biochemistry from Tulane and a bachelor's degree from Nanjing University.

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## Case Study: Hengrui's strategic shift to the global market

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- L. Yun, "Billion Dollar Tuition: Behind the Hengrui BD Controversy" *Blue View*, January 18, 2024.
- A. DeAngelis and E. Chen, "Jiangsu Hengrui, a preferred China partner for U.S. biotech, hints at more deals," *STAT News*, Jan 16, 2025.

2:30 – 4:00pm

*Guest Lecturer: Frank Jiang, Hengrui Pharmaceuticals*



**Dr. Frank Jiang is the Chief Strategy Officer and a Board Director at Hengrui** (a global top 50 pharma). He has over 30 years of experience in management of medical practice and pharmaceutical industry. At Hengrui, Dr. Jiang oversees corporate strategy, clinical development, and business development. Prior to Hengrui, Dr. Jiang served as the founding CEO and Chairman of the Board at CStone Pharmaceuticals, a leading biotech in China where Dr. Jiang led the team to build its pipeline from zero to 16 assets, including 4 marketed products with a total of 10 approved indications. Prior to CStone, Dr. Jiang was the Head of Asia Pacific R&D (including Japan) for Sanofi.

## EMBA 6018 2.0: Building an AI Powered Organization

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

2. **Course Number:** EMBA 6018

3. **Credit Value:** 2.0

4. **Long Course Title:** Building an AI Powered Organization

5. **Short Course Title:** Building an AI Powered Organization

6. **Effective Session:** Summer 2025

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

This course focuses on the most relevant managerial aspects that foster the adoption of AI in organizations that are required to systematically integrate AI into core processes and help to achieve important business goals. It highlights how firms can leverage AI to foster innovation, to identify new revenue streams, to spur growth and to increase competitive advantage.

8. **Expanded Course Description:**

The successful adoption of AI requires more than investments into technology and talent, it poses new and significant managerial, cultural, legal, regulatory and ethical challenges for managers. This course focuses on the most relevant managerial aspects that foster the adoption of AI in organizations that are required to systematically integrate AI into core processes and help to achieve important business goals. It highlights how firms can leverage AI to foster innovation, to identify new revenue streams, to spur growth and to increase competitive advantage. The course discusses roadblocks to successful AI adoption and implementation in organizations and illustrates what managers can do to overcome these roadblocks. It develops metrics and tools that allow managers to assess and to improve the contribution of AI to corporate performance. A substantial focus of the course will be on the required leadership skills for newly established positions in organizations that play a crucial role for the successful implementation of AI in organizations. The course provides practical tools and methods for organizations and includes multiple guest speakers and a real business case with a German company that has embraced AI proactively.

9. **Course Learning Outcomes:**

Upon completion of the course, students will be able to:

- Understand how the successful integration of AI into core processes creates value and allows to achieve important business and performance goals.
- Identify the most relevant managerial aspects that foster the adoption of AI in organizations.
- Prepare for assuming newly created leadership positions and management roles that are crucially important to build strong and successful AI-powered organizations.

10. **Rationale:**

Artificial intelligence (AI) is reshaping many businesses and firms across industries have increased their investments into AI technologies significantly. Despite the high promises of

AI, many firms struggle with the adoption of AI and have failed to integrate AI systematically into core processes and to leverage AI to achieve important business goals. Since many of our students will have these kinds of experiences, the course should help identify and address them.

**11. Evaluation:**

Assessment is based on two case studies (25% each) that need to be analysed in groups and handed in during the course and a final individual exam (50%).

**12. Integrated Courses:**

NOT integrated

**13. Crosslisted Courses:**

NOT crosslisted

**14. Faculty Resources:**

This course is being offered as a global elective by our partner within the Kellogg EMBA Global Network, the Otto Beisheim School of Management at WHU in Vallendar, Germany. The course is taught by Professor Holger Ernst, Chair of Technology and Innovation at WHU. He is also a regular visiting professor and a member of the Center for Research in Technology and Innovation (CRTI) at the Kellogg School of Management, Northwestern University. His research interests lie in the fields of strategy, innovation, artificial intelligence, new product development and intellectual property.

**15. Physical Resources:**

Classes for this course will be held over five days in person at the Otto Beisheim School of Management of WHU in Vallendar, Germany, our partner within the Kellogg EMBA Global Network. They will organize and provide all necessary resources.

**16. Bibliography and Library Statement:**

There is no textbook for this course. All the required as well as optional readings for the various class sessions are posted on the Moodle Learning Management System of the Otto Beisheim School of Management, to which our students will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

# MEMORANDUM

## York University Libraries

**To:** Matthias Kipping

**From:** Angie Liann, Teaching and Learning Librarian, Student Learning & Academic Success Department

**Date:** March 27, 2025

**Subject:** Library Statement of Support - Kellogg | Schulich EMBA: Building an AI Powered Organization

### Summary

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

### Collections

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

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

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

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

#### **Selection of Business Databases:**

- Mergent Intellect
- Marketline Advantage
- Statista
- Complete listing of databases available on [Business Databases A-Z webpage](#)

#### **Business Articles & Newspaper Collections:**

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

#### **eBook Platforms:**

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

## **Services**

#### **Library Instruction**

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

#### **Research Guides & eLearning Modules of Interest:**

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

- [Industry Research Guide](#)
- [Market Research Guide](#)
- [Country & International Business Information](#)

## **Research Help**

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

## **Accessibility Services**

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

## **I. Information about the Instructor**

Prof. Dr. Holger Ernst  
Chair for Technology and Innovation Management  
WHU - Otto Beisheim School of Management  
Burgplatz 2; 56179 Vallendar, Germany  
Tel.: +49(0)261-6509-241  
Fax: +49(0)261-6509-249  
E-Mail: [hernst@whu.edu](mailto:hernst@whu.edu)  
Internet: [www.whu.edu/tim](http://www.whu.edu/tim)



### **I.1 Academic Career and Positions**

Holger Ernst is full professor of business administration, esp. technology and innovation management at the WHU - Otto Beisheim School of Management, Vallendar, Germany. He studied business administration at the University of Kiel, Germany and the University of Illinois at Urbana-Champaign, USA. He received a degree in business administration (1992), his Ph.D. (1996) and the Habilitation (2001) from the University of Kiel, Germany.

Prof. Ernst is a regular visiting professor and a member of the Center for Research in Technology and Innovation (CRTI) at the Kellogg School of Management, Northwestern University, USA. He was appointed honorary professor and principal fellow within the Faculty of Business and Economics at the Melbourne Business School, The University of Melbourne, Australia.

Prof. Ernst served as the chairman of the technology, innovation and entrepreneurship division of the association of professors of business administration (Verband der Hochschullehrer für Betriebswirtschaftslehre) in Germany, Austria and Switzerland between 2009 and 2011 and as vice chairman between 2007 and 2009.

Prof. Ernst served as the speaker of the innovation and entrepreneurship Group at WHU – Otto Beisheim School of Management, Germany, between 2007 and 2013.

### **I.2 Research and Related Awards**

Prof. Ernst's research interests lie in the fields of strategy, innovation, artificial intelligence, new product development and intellectual property. He has published in leading international journals such as the Journal of Marketing, Journal of the Academy of Marketing Science, Journal of Product Innovation Management, California Management Review, MIT Sloan Management Review, IEEE Transactions on Engineering Management, R&D Management, Research Policy, Small Business Economics and others.

Prof. Ernst has received multiple best dissertation, best paper and other research awards. He serves on the editorial boards of the Journal of Product Innovation Management (JPIM), Creativity and Innovation Management and Journal of Knowledge Management.

Prof. Ernst won the “Outstanding Reviewer Award” of the *Journal of Product Innovation Management* (JPIM) in 2019. JPIM is the leading, international innovation journal.

The paper “Sales, Marketing, and Research-and-Development Cooperation across New Product Development Stages: Implications for Success” by Holger Ernst, Wayne D. Hoyer

and Carsten Rübsaamen (*Journal of Marketing*, 2010, Vol. 74 (5), pp. 80-92) is ranked among the ten most relevant academic articles for marketing practice (Kamel Jedidi, Bernd H. Schmitt, Malek Ben Sliman, and Yanyan Li. “R2M Index 1.0: Assessing the Practical Relevance of Academic Marketing Articles” (*Journal of Marketing*, 2021, Vol. 85 (5), pp. 22-41).

The same paper received the Eli Jones Long-Term Impact Award for its outstanding scientific contributions in the field of Marketing and Sales, which was awarded in 2024 by the Eli Jones and the Reynolds and Reynolds Sales Leadership Institute at Texas A&M University, USA.

### **I.3 Teaching and Related Awards**

Prof. Ernst has 27 years of experience in executive education. He has taught in multiple executive MBA programs, e.g. the Kellogg-WHU Executive MBA Program (since KW01), the Melbourne Business School Senior Executive MBA Program (since start in 2004), the Melbourne Business School Executive MBA Program and in various WHU and Kellogg Executive Customized Programs for companies such as 3M, Arag, Coca Cola, Dt. Börse, Esai Pharmaceuticals, Merck, L’Oreal, Santander, Sony, Süd-Chemie, Nissan, DuPont, SITA and Sony-Ericsson and universities such as Carnegie Mellon University, CEIBS, Drexel University, Guanghua School of Management, IIM Bangalore, Milliken University, Monash University, Northwestern University (Kellogg), Sun Yat Sen University, Toronto University (Schulich), Tsinghua University and Xiamen University.

Prof. Ernst received Best Teacher Awards in the WHU Full-Time MBA Program in 2006, in the Bucerius-WHU Master of Law and Business Program in 2008 and in the WHU Part-Time MBA Program in 2012.

### **I.4 Entrepreneurial Experience and Industry Exposure**

Prof. Ernst is co-founder of the firm Patentsight, located in Bonn, Germany, that specializes in the development and selling of software products and consulting services in the field of business intelligence based on patent data. Patentsight’s unique products are based on Prof. Ernst’s long-term and groundbreaking research on patent analytics, patent valuation and patent management. Patentsight is a market leader in its field and serves well-known clients worldwide. Patentsight was acquired by RELX (Lexis Nexis) in 2018 and is now part of Lexis Nexis IP Solutions.

Prof. Ernst has developed and runs the InnovationSuccess Panel (IsP®), a comprehensive audit tool that benchmarks a firm’s innovation management against innovation and market leaders across multiple industries.

Prof. Ernst advises and speaks to corporations worldwide. Clients so far include, e.g., Allianz, Asahi Kasei, BASF, Biocon, Bitburger, Bosch and Siemens Hausgeräte, Constantia Hüick, Cognis, Daikin, DPDHL, Dt. Telekom, Elster Group, General Electric, Gerresheimer, Henkel, Johnson & Johnson, Kion, LTS, NAB Bank Australia, MVV Umwelt GmbH, Novo Nordisk, Otto Bock, Randstad, Ricoh, Roland Berger, Sabic, SAP, Sebapharma GmbH & Co., Siemens, Simon, Kucher & Partner, SITA, SMA-Solar, Stabilus, Styrolution, Sumitomo Chemical, Swiss Re, Takeda, Trendone, Trox GmbH, TÜV-Nord, Zühlke AG and others.

Prof. Ernst has served on the advisory board of start-up firms and provides support to start-ups as an advisor and/or investor.

## **II. Information about the Course**

### **II.1 Course Content**

Artificial intelligence (AI) is reshaping many businesses and firms across industries have increased their investments into AI technologies significantly. Despite the high promises of AI, many firms struggle with the adoption of AI and have failed to integrate AI systematically into core processes and to leverage AI to achieve important business goals.

The successful adoption of AI requires more than investments into technology and talent, it poses new and significant managerial, cultural, legal, regulatory and ethical challenges for managers. This class focuses on the most relevant managerial aspects that foster the adoption of AI in organizations that are required to systematically integrate AI into core processes and help to achieve important business goals. It highlights how firms can leverage AI to foster innovation, to identify new revenue streams, to spur growth and to increase competitive advantage.

The class discusses roadblocks to successful AI adoption and implementation in organizations and illustrates what managers can do to overcome these roadblocks. It develops metrics and tools that allow managers to assess and to improve the contribution of AI to corporate performance.

A substantial focus of this class will be on the required leadership skills for newly established positions in organizations, such as analytics translators and Chief AI Officers (CAIOs) that play a crucial role for the successful implementation of AI in organizations.

The course has a strong focus on applying practical, useful tools and methods in organizations. Therefore, multiple guest speakers from firms that lead regarding AI will come to class and share their practical experiences and best AI practices with the students. Guest speakers will include Ramin Mirza, Chief Operating Officer of Alep Alpha (<https://aleph-alpha.com>), one of the biggest and most promising AI start-ups in Europe. Another guest speaker will be Dr. Andreas Nauerz, CTO, EVP and Member of the Board of Bosch Digital, Robert Bosch GmbH (<https://www.bosch.com>).

In addition, we will do a real case on the business side of AI together with Executives from the firm Trumpf, based in Ditzingen, Germany (<https://www.trumpf.com>), world market leader for machine tools and high-end laser applications. Trumpf is a so-called Hidden Champion from Germany, a very innovative and market leading firm, that has embraced AI pro-actively and has successfully incorporated AI in its core products, processes and solutions.

This class builds especially on the courses “Strategic Innovation and Corporate Renewal” and “Generative AI for Business Applications” in the Kellogg/WHU EMBA program curriculum.

### **II.2 Course Objectives**

The core objective of the course is to get across the most relevant managerial aspects that foster the adoption of AI in organizations, the successful integration of AI into core processes to create value and to achieve important business and performance goals with AI. The course further aims to train managers and future leaders for newly created leadership positions and management roles that are crucially important to build strong and successful AI-powered organizations.

## II.3 Schedule, Sessions, and Readings

**Sessions 1-4: Introduction, AI, Strategy and Innovation, Case 1 (May 1<sup>st</sup>; 1.30 pm to 4.45 pm; May 2<sup>nd</sup> 1.30 – 4.45 pm)**

### **Required Readings (Must read prior to class):**

Iansiti, M., Lakhani, K. (2020): Competing in the age of AI. Harvard Business Review. January-February 2020, pp. 61-67.

Morris, S., Uddin, R. (2025): BigTech's AI spending poised to exceed \$300bn this year despite DeepSeek impact. Financial Times. 8.2.2025.

Sawhney, M., Wolcott, R.C. and Arroniz, I. (2006): The 12 different ways for companies to innovate. MIT Sloan Management Review. Vol. 47 (3), pp. 75-81.

### **Additional Readings (Suggested and optional readings for more details and specifics):**

Artificial Intelligence Index Report (2024), Stanford University.  
<https://aiindex.stanford.edu/report/>

Brynjolfsson, E., McAfee, A. (2017): The business of Artificial Intelligence. Harvard Business Review. July 2017. pp. 3-11.

Castro, F., Gao, J., Martin, S. (2025): Does GenAI impose a creativity tax? MIT Sloan Management Review. Winter 2025. pp. 9-11.

Chui, M. et al. (2023): The economic potential of generative AI. McKinsey Report June 2023.

Cooper, R. (2024): The AI transformation of product innovation. Industrial Marketing Management. Vol. 119, pp. 62-74.

Davenport, T.H. (2019): The AI advantage. How to put the Artificial Intelligence revolution to work. MIT Press. Cambridge, MA.

De Bellefonds, N. et al. (2024): Where's the value in AI? BCG Report October 2024.

Eapen, T.T., Finkenzstadt, D.J., Folk, J., Venkataswamy, L. (2023): How generative AI can augment human creativity. Harvard Business Review. July-August 2023, pp. 56-64.

Iansiti, M., Lakhani, K. (2020): Competing in the Age of AI: Strategy and Leadership. When Algorithms and Networks Run the World. Harvard Business School Press.

Manly, J. et al. (2024): Innovation systems need a reboot. BCG Report June 2024.

Manly, J. et al. (2023): How early winners are unlocking AI's potential, in: Most Innovative Companies 2023 - Reaching new heights in uncertain times, BCG (2023), pp.14-23.

Neville, S., Waters, R. (2019). Novartis and Microsoft join forces to develop drugs using AI. Financial Times (October 1, 2019) and Smyth, J. (2023): Biotech begins human trials of drug

designed by artificial intelligence. Financial Times. 26.6.2023 and Hiekkilä, M. (2025): Google AI tool aims to equip scientists with superpowers. Financial Times, 20.2.2025, p. 6.

Purdy, M. et al. (2020): How digital twins are reinventing innovation. MIT Sloan Management Review. 14.1.2020.

Schwaerzler, C. et al. (2024): The AI maturity matrix. BCG Report November 2024.

Verganti et al. (2020): Innovation and design in the age of artificial intelligence. Journal of Product Innovation Management. Vol. 37 (3), pp. 212-227.

Waters, R. (2023): The AI revolution's slow first year. Financial Times. 30.12.2023.

Waters, R. (2023): Microsoft pioneers use of generative AI in software – at a price, Financial Times, November 1<sup>st</sup>.

### **Sessions 5-6: Barriers to AI Implementation and Success Factors of AI Adoption (May 3rd; 1.30 pm to 4.45 pm)**

#### **Required Readings (Must read prior to class):**

Fountainaine, T., McCarthy, B., Saleh, T. (2019): Building the AI-Powered Organization. Harvard Business Review, July-August 2019, pp. 66-73.

Henke, N., Levine, J., McInerney, P. (2018): You don't have to be a data scientist to fill this must-have analytics role. Harvard Business Review. 5.2.2018.

Howell, J.M. (2005): The right stuff: identifying and developing effective champions of innovation. Academy of Management Executive. Vol. 19, No. 2, pp. 108-119.

Jacobs, E. (2024): Companies rush to appoint chief AI officers. Financial Times. 15.4.2024.

Wade, M. et al. (2024): Do you really need a chief AI officer? MIT Sloan Management Review, Fall 2024, pp. 62-66.

#### **Additional Readings (Suggested and optional readings for more details and specifics):**

Amazon (2025): <https://www.aboutamazon.com/about-us/leadership-principles>.

Furstenthal, L., Morris, A., and Roth, E. (2022): Fear factor: Overcoming human barriers to innovation: McKinsey & Company.

Gossett, S. (2022): What analytics translators do (and what skills they need). <https://builtin.com/data-science/analytics-translator>.

Kasyanau, A. (2024): How chief AI officers are guiding healthcare companies into the future. Forbes, 19.6.2024. <https://www.forbes.com/councils/forbestechcouncil/2024/06/13/how-chief-ai-officers-are-guiding-healthcare-companies-into-the-future>.

Kelly, J. (2024): The rise of the Chief AI officer. Forbes, 28.5.2024. <https://www.forbes.com/sites/jackkelly/2024/05/28/the-rise-of-the-chief-ai-officer>.

Körber, C., Buchfink, G., Völker, H. (2010): Innovation in the interplay of organization and culture: The Trumpf story. In: Gerybadze, A. et al. (eds.). Innovation and International Corporate Growth. Springer-Verlag, Berlin Heidelberg 2010, pp. 91-111.

Sampath, S. (2024): Your teams should drive AI adoption – Not senior leadership. Harvard Business Review. <https://hbr.org/2024/04/your-teams-should-drive-ai-adoption-not-senior-leadership>.

**Sessions 7-9: Case 2 with Guest Speakers from Trumpf (May 4th; 1.30 pm to 6.30 pm)**

**Session 10: Guest Speaker: Ramin Mirza, Chief Operating Officer, Alep Alpha (May 5th; 1.30 pm to 3.00 pm)**

**Session 11: Guest Speaker: Dr. Andreas Nauerz, CTO, EVP and Member of the Board of Bosch Digital (May 5th; 3.15 pm to 4.45 pm)**

### **III. Assignments and Grading**

The grading will be based on two **group** assignments (in total: 50 points) and one final **individual** exam (50 points).

All assignments must be sent on the due date (see table below for details) to [holger.ernst@whu.edu](mailto:holger.ernst@whu.edu). The questions for the group assignments will be handed out in class. There are reserved time slots in class, in which the groups can work on the cases.

#### **Group assignments and due dates:**

#	Case:	Points:	Assignment:	Due:
1	Case 1	25	2.05.2025 (1.30 pm)	2.05.2025 (3.00 pm)
2	Case 2	25	4.05.2025 (tbd)	4.05.2025 (tbd)

## EMBA 6019: Corporate Social Innovation

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1. **Program:** Kellogg-Schulich Executive MBA
2. **Course Number:** EMBA 6019
3. **Credit Value:** 2.0
4. **Long Course Title:** Corporate Social Innovation
5. **Short Course Title:** Corporate Social Innovation
6. **Effective Session:** Winter-Summer 2025

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

This course is designed to offer an overview of the various roles businesses across the for profit, non-profit and governmental sectors play in improving the world. Participants will learn how to create organizational shared value through a Corporate Social Innovation (CSI) framework and, examine successful and unsuccessful attempts to compete using a social purpose agenda through readings and practitioner accounts.

8. **Expanded Course Description:**

Using the Socratic Method this course is designed to offer students an overview of the various roles businesses across the for profit, non-profit and governmental sectors play in improving the world. Pulling articles and stories in real time it will examine how companies are responding to social challenges using Corporate Social Responsibility (CSR) strategies and gain an understanding of the role government and philanthropist play in helping/hindering positive societal change. It will discuss how to create organizational shared value through a Corporate Social Innovation (CSI) framework, explore specific examples of both successful and unsuccessful attempts to compete using a social purpose agenda and look at the role the board of directors plays within an organization. Students will also have a chance to hear first-hand from practitioners who are working at the forefront of business and societal change.

9. **Course Learning Outcomes:**

Upon completion of the course, students will be able to:

- Better understand and appreciate the complexities involved at the intersection of profit and purpose.
- Distinguish and apply various approaches to defining, measuring, and tracking a social innovation(s) across the non-profit, for profit and governmental sectors.

10. **Rationale:**

In current society, how to measure the success of a business has changed as the expectations of consumers and investors continue to shift beyond the basic Key Performance Indicators (KPI's) of free cash flows, revenue growth rates and inventory turnover. Today's business leaders must not only navigate an increasingly competitive global market, but also carefully navigate through increased amounts of data, political shifts, global pandemics, racial tensions, and a change in public perception. Whether they realize it or not they are often looked upon to contribute towards solutions that seek to address many

of today's most pressing social ills such as climate change, economic disparity, and structural discrimination. Going forward to be competitive and attract top talent, all organizations must adopt policies that better align profit and purpose while acknowledging the full scope of their role in society. To move forward leaders across all sectors must look inward and recognize that while they fight to protect their organizations; they may simultaneously be contributing towards the very societal problems they claim to want to fix. This course complements our own courses on Responsible Business Leadership and Innovating for Social Impact and should be of interest to a number of our students.

**11. Evaluation:**

Assessment will be based on a group project (30% for the presentation and 5% for a team conduct policy), an individual thought paper (25%), and class participation (35% individual and 5% peer evaluation).

**12. Integrated Courses:**

NOT integrated

**13. Crosslisted Courses:**

NOT crosslisted

**14. Faculty Resources:**

This course will be taught by William W. Towns, Adjunct Professor in Kellogg's Sustainability and Social Impact Program. He holds an MBA from the University of Notre Dame Mendoza School of Business, and a PhD in Organization Development from Benedictine University, and is currently the Managing Director of 4S Bay Partners, LLC's Chi-Town Impact, a private equity fund that invests in women- and minority-operated businesses.

**15. Physical Resources:**

Classes for this course will be held remotely (synchronous) over 5 weeks during Kellogg's Spring term, which lies between York's Winter and Summer terms. Kellogg will provide the necessary Zoom link and related support.

**16. Bibliography and Library Statement:**

Required and recommended readings for the course will be posted on the Kellogg Canvas site, to which our students will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

# MEMORANDUM

## York University Libraries

**To:** Matthias Kipping

**From:** Angie Liann, Teaching and Learning Librarian, Student Learning & Academic Success Department

**Date:** March 27, 2025

**Subject:** Library Statement of Support - Kellogg | Schulich EMBA: Corporate Social Innovation

### Summary

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

### Collections

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

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

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

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#### **Selection of Business Databases:**

- Mergent Intellect
- Marketline Advantage
- Statista
- Complete listing of databases available on [Business Databases A-Z webpage](#)

#### **Business Articles & Newspaper Collections:**

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

#### **eBook Platforms:**

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

## **Services**

#### **Library Instruction**

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

#### **Research Guides & eLearning Modules of Interest:**

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

- [Industry Research Guide](#)
- [Market Research Guide](#)
- [Country & International Business Information](#)

## **Research Help**

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

## **Accessibility Services**

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

# Northwestern | Kellogg

## **COURSE SYLLABUS**

**SSIM-917-5: Corporate Social Innovation**

**Spring 2025 1<sup>st</sup> Session**

**1<sup>st</sup> Class Friday, April 4<sup>th</sup> 6:30 pm to 9:30 pm**

**2<sup>nd</sup>- 5<sup>th</sup> Class Monday, 6:30 pm to 9:30 p.m., Evanston**

**William W Towns, PhD, MBA**

[william.towns@kellogg.northwestern.edu](mailto:william.towns@kellogg.northwestern.edu)

## **Teaching Assistant:**

### **Introduction**

In our current society, how we measure the success of a business has changed as the expectations of consumers and investors continue to shift beyond the basic Key Performance Indicators (KPI's) of free cash flows, revenue growth rates and inventory turnover. Today's business leaders must not only navigate an increasingly competitive global market, but also carefully navigate through increased amounts of data, political shifts, global pandemics, racial tensions, and a change in public perception. Whether they realize it or not today's business leaders are often looked upon to contribute towards solutions that seek to address many of today's most pressing social ills such as climate change, economic disparity, and structural discrimination.

Going forward to be competitive and attract top talent, all organizations must adopt policies that better align profit and purpose while acknowledging the full scope of their role in society. To move forward leaders across all sectors must look inward and recognize that while they fight to protect their organizations; they may simultaneously be contributing towards the very societal problems they claim to want to fix.

### **Course Description**

Using the Socratic Method this course is designed to offer students an overview of the various roles businesses across the for profit, non-profit and governmental sectors play in improving the world. Pulling articles and stories in real time we will examine how companies are responding to social challenges using Corporate Social Responsibility (CSR) strategies and gain an understanding of the role government and philanthropist play in helping/hindering positive societal change. We will discuss how to create organizational shared value through a Corporate Social Innovation (CSI) framework, explore specific examples of both successful and unsuccessful attempts to compete using a social purpose agenda and look at the role the board of directors plays within an organization. Students

will also have a chance to hear first-hand from practitioners who are working at the forefront of business and societal change.

## Course Format

Each of the first four sessions of this five-week course focuses on a particular dimension of corporate social responsibility strategy. Each session will include a class discussion on the week's topic, along with a presentation by a guest speaker representing a company or organization at the heart of the topic at hand. The fifth week consists of collaborative group presentations and discussion.

## Course Objectives

- To familiarize students with various approaches to defining, measuring, and tracking a social Innovation(s) across the non-profit, for profit and governmental sectors.
- To enable students to better understand and appreciated the complexities involved at the intersection of profit and purpose.

## Grading

Grading will be based on three inputs: class participation, group project, and a thought paper. The rationale for grading is as follows: Success in this field is a function of analytical skills, subject matter expertise and the ability to advocate for a position. The group project incorporates each of these. Thought papers test analytical skills and applied concepts, and class participation demonstrates subject matter mastery and strategic thinking and consideration of the topics of the course.

Assignment(s)	Points
Team Presentation	30
Team Conduct Policy	5
Thought Paper	25
Class Participation	35
Peer Evaluation	5

## Team Presentation

With your team members, you will develop a for profit business idea that seeks to balance profits and purpose addressing a social need utilizing the concepts discussed during the course. This business idea could be an existing standalone business or a new business partnership that connects existing expertise and assets between two or more businesses to address a society need. A successful presentation will have/address the following components.

A Clear and through understanding of the context and problem landscape

Supportable and information-based assumptions

The concept will be amendable to financing (internal or external)

The proposed solution is viable

Strength of the proposed solution or approach (likelihood of happening)

Innovativeness of the idea

Potential of the Business(es) to execute effectively

Strategic fit of the concept

Alignment with Brand

Potential Impact Business and Societal

## Team Conduct Policy

For innovative organizations to be successful each member must be committed to the success of not just themselves and their team, but to the success of the organization overall. To meet this commitment, all involved must pledge to work together as a team in a professional manner and with a unity of purpose. Each team member vows to respect the other team members, to value their input, and to participate in a helpful, open -minded manner. The team will recognize and celebrate the success of other teams as well as its members. In order to have a clear understanding or expectation each team will create a Conduct Policy that lays out the behaviors and attributes that will be expected from each team member in the conduct of the daily project business.

## Thought Paper

In addition to the team presentation each student will turn in a 600-to-1,200-word Op Ed based on your overall belief that businesses can and will innovate to address a social issue(s) as an intentional part of their business strategy. This assignment should take into consideration both your personal experiences as well as the readings, class discussion and guest speakers. The paper should be in the following format:

<b>Margins:</b>	Left margin 1.5 inches; all others 1.25
<b>Spacing:</b>	Double space all text
<b>Font:</b>	Times New Roman 12

**References:** Not required but if used should be done in *The Chicago Manual of Style* and does not count towards the body of the paper.

In grading the following will be taken into consideration:

- Provides a clearly defined point on an issue
- Is written with clarity
- Has a strong point of view and unique voice of the writer
- Engaging, insightful and relevant thinking
- Applicability of insights to business and policy leaders

## Peer Evaluation

Each member within the team will assess every other member's contribution to the group assignment including their own, with a confidential peer review form that considers each member's intellectual contribution, initiative, workload, and overall adherence to the teams conduct policy.

This course adheres to the guidelines established in the [Kellogg Honor Code](#) and the [Kellogg Code of Classroom Etiquette](#).

## Weekly Schedule

### Week 1: Building the Foundation

Today, social and environmental outcomes have real economic value. Without them, companies cannot grow, governments cannot succeed, and consumers cannot improve their quality of life. As social outcomes become more valuable, philanthropy is being eclipsed by the power of capital markets.

**Topics covered:** Introduction to course and concepts; The crazy times we live; What is innovation and entrepreneurship; Areas of innovation; Corporate social responsibility (CSR); Final presentation; Thought paper; Peer evaluation; Corporate social innovation Conduct Policy; Creation of teams

### Readings in preparation

**[Rethinking the Social Responsibility of Business:](#)** A Reason debate featuring Milton Friedman, Whole Foods' John Mackey, and Cypress Semiconductor's T.J. Rodgers

[Englewood Whole Foods Opens: It Feels Like A Brand New Day'](#)

[Englewood residents mourn the loss of their Whole Foods and ponder what's next](#)

[‘The socialists are taking over,’ Whole Foods CEO John Mackey laments](#)

## **Guest Speaker (TBD)**

### **Assignment due for next class:**

Conduct Policy Statement

### **Week 2: Creating Shared Value**

Shared value is a management strategy in which companies find business opportunities in social problems—and since the release of the HBR article, “Creating Shared Value,” the term has been at the center of conversation about CSR and innovation. But is it viable, realistic and sustainable?

**Topics covered:** Announcements; Questions; In the news; Corporate Social Innovation; Moving from CSR to Corporate Social Innovation; Defining Shared Value; Building a shared value organization; Challenges to Shared Value (CSV)

### **Readings in preparation:**

- [Creating Shared Value](#)
- [Contesting the Value of “Creating Shared Value”](#)
- [Innovating for Shared Value](#)

### **Skim the following:**

- TBD

## **Speaker (TBD)**

### **Assignment due for next class:**

Within your groups discuss and select a megatrend and/or major challenge facing society and business. This will be the subject of your final pitch and may involve strategies for creating value for both society and the business; environmental sustainability and reporting; social impact in consumer product marketing among other topics. Each team will present their topics during the next class.

### **Week 3: Social Innovation and Purpose in Marketing and Retail**

Social impact strategy and messaging has been particularly popular in marketing functions, especially for consumer-facing industries. What makes marketing, consumer goods and retail powerful innovators in social impact, and what's next?

**Topics covered:** Announcements; Questions; In the news; Orthodox vs. Unorthodox approaches to Societal issues; Competing on social purpose; Three domains of social purpose; the important role of stakeholder acceptance; The rise and fall of the one for one strategy; when good goes bad; Why do corporations reinforce racial stereo types; How to build the courage to stand alone; Strategies for making the innovative pitch;

**Reading in preparation:**

[Competing on Social Purpose](#)

[Avoiding Unintended Consequences](#)

Toms one for one

Gucci and Prada aim for outrageousness, instead they get outrage.

Gucci Creative Head Says \$890 Sweater Was Not Inspired by Blackface

Prada Will Stop Selling \$550 Monkey Figure Decried Racist

A timeline of Balenciaga's Ad Campaign Scandal

<https://www.businessoffashion.com/articles/workplace-talent/can-fashion-be-inclusive-without-saying-dei/>

**Additional Reading:**

- To be determined

**Speaker** (TBD)

## **Week 4: Social Missteps**

With millennials now officially the largest part of the work force their impact spread far beyond the workplace. In this session we will explore the true impact of millennial on work and society and explore how generation Z is prime for even more impact.

In an ever-increasing battle to remain relevant in a social media driven landscape, a company's go to market time has decreased significantly over the years. This compressed timeline has yielded many successful innovations, but often this rush to market as resulted with an unintended negative social impact for the company, leadership and customer base. Why do these missteps continue to happen? What should you do once a social misstep occurs?

**Topics covered:** Impact of Millennials and Generation Z on corporate America; Can policy solve racism? What role can corporation play in social justice; Define race, equity and discrimination; setting the goal for social justice; Taking a stand for... What is right?; Importance of evaluation

**Readings in preparation:**

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- [U.S. Deloitte 2016 Impact Survey](#)
- Millennial Impact Report 10 year look Back
- True Gen Z and Its Implication for Companies
- Moving from Corporate Social Responsibility to Corporate Social Justice
- How to promote Racial Equity in the workplace

**Speaker:** TBD

**Week 5: Final Project: Social Purpose Marketing Pitch**

Board Meeting and Team Presentations. All assignments are due.

**Topics covered:** Thank you.

## Course Change Proposal – The New Era of Marketing in China

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

**1. Program**

*Kellogg-Schulich Executive MBA Program*

**2. Course Number and Credit Value**

*EMBA 6015 2.00*

**3. Course Title**

**a) Long Course Title**

*The New Era of Marketing in China*

**b) Short Course Title**

*The New Era of Marketing in China*

**4. Existing Pre-requisites/Co-Requisites**

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

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

**6. Effective Session of Proposed Change(s)**

*Fall 2024*

**7. Academic Rationale**

While the course itself has not been changed, the revised title better reflects the actual course content and its focus on marketing in China.

**8. Proposed Course Information**

<b>Existing Course Information (Change from)</b>	<b>Proposed Course Information (Change to)</b>
<i>Title: The New Era of Marketing in China</i>	<i>New Title: China Marketing: Tech, Society and Beyond</i>

**9. Consultation**  
N/A

**Originator**

<u>Ying Zhang</u>	_____
Signature	Date

<u>Ying Zhang</u>	_____
Name	Area or Specialization

**Approvals:**

**Area or Specialization**

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

<u>Matthias Kipping</u>	<u>March 16, 2025</u>
Signature	Date

<u>Matthias Kipping</u>	<u>Kellogg-Schulich Executive MBA</u>
Name	Area or Specialization

**Degree Program**

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

<u>Matthias Kipping</u>	<u>March 16, 2025</u>
Signature	Date

<u>Matthias Kipping</u>	<u>Kellogg-Schulich Executive MBA</u>
Name of Program Director	Program

**Program Committee**

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

Kevin Tasa

Signature

March 16, 2025

Date

Kevin Tasa

Name of Committee Chair

Kellogg-Schulich Executive MBA

Committee

**Required Attachments**

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

**Send to**

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

### **China Marketing: Tech, Society and Beyond**

Instructor: Ying Zhang

Program: Guanghua-Kellogg EMBA

Semester: Fall 2024

Time: November 12-14, 2024

Credit Hour: 15

Credits: 1

Prerequisite: N/A

Location: Shanghai Campus

#### **Contact Information:**

Prof. Ying Zhang

Office: Bldg 2, Rm 446

Tel: 010-62756275

Email: zhang@gsm.pku.edu.cn

#### **Office Hours: by appointments only**

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#### **Brief Course Description**

In this comprehensive and practical introduction to marketing in China, students are going to develop familiarity with the China marketing environment and making effective marketing decisions, including assessing marketing opportunities and developing marketing strategies. Course will cover topics including macroeconomic environment, success and failure of market entry, development of business platforms in China, Internet marketing and social media. Through a combination of interactive discussions, cases, practical examples, and individual assignments, students can gain experience in identifying the uniqueness of this challenging yet rewarding market.

#### **Course Objectives**

To enhance students' understanding of the characteristics and competitive situation in the Chinese market, and prepare for more advanced discussions on the Chinese economy and business practice.

## Course Syllabus

### Course Plan

**Class 1:** Market Entry and Brand building in China

**Class 2:** Competition and Growth in a Dynamic Market

**Class 3:** The Evolution of Market Platforms in China

**Class 4:** Platform-based Product Development in a Digitalized China

### Teaching Methods

This course will involve lectures, case discussion and group assignments. Each student is expected to contribute actively to classroom discussion.

### Course Assessment

1. Class participation      20%
2. Individual assignment   80%

Choose one of the two topics below and write an essay.

- (1) A mini-case study of a Chinese brand or a foreign brand in China. Analyze its marketing practices that have led to success or failure in China market.
- (2) Analyze the marketing trends in China and discuss how these trends may affect your company's marketing strategy.

Format requirement: 2-4 pages (single-spaced, 12pt) in total length, excluding figures or tables if applicable.

### Rules students must follow

Attendance is crucial in the learning process. Email notification to the instructor has to be given for any class you are going to miss.

## Course Change Proposal – Sustainability Leadership

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

**1. Program**

*Kellogg-Schulich Executive MBA Program*

**2. Course Number and Credit Value**

*EMBA 6135 2.00*

**3. Course Title**

**a) Long Course Title**

*Sustainability Leadership*

**b) Short Course Title**

*Sustainability Leadership*

**4. Existing Pre-requisites/Co-Requisites**

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

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

**6. Effective Session of Proposed Change(s)**

*Fall 2024*

**7. Academic Rationale**

While the course itself has not been changed, the revised title better reflects the actual course content and its focus on sustainable business transformation.

**8. Proposed Course Information**

<b>Existing Course Information (Change from)</b>	<b>Proposed Course Information (Change to)</b>
<i>Title: Sustainability Leadership</i>	<i>New Title: From Risk to Reward: Strategies for Sustainable Business Transformation</i>

**9. Consultation**  
N/A

**Originator**

<u>Han Shi &amp; Karl Schmedders</u>	_____
Signature	Date

<u>Han Shi &amp; Karl Schmedders</u>	_____
Name	Area or Specialization

**Approvals:**

**Area or Specialization**

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

<u>Matthias Kipping</u>	<u>March 16, 2025</u>
Signature	Date

<u>Matthias Kipping</u>	<u>Kellogg-Schulich Executive MBA</u>
Name	Area or Specialization

**Degree Program**

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

<u>Matthias Kipping</u>	<u>March 16, 2025</u>
Signature	Date

<u>Matthias Kipping</u>	<u>Kellogg-Schulich Executive MBA</u>
Name of Program Director	Program

**Program Committee**

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

Kevin Tasa

Signature

March 16, 2025

Date

Kevin Tasa

Name of Committee Chair

Kellogg-Schulich Executive MBA

Committee

### **Required Attachments**

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

### **Send to**

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

**Title** From Risk to Reward: Strategies for Sustainable Business Transformation

**Instructors** Prof. Karl Schmedders, PhD (Sessions 1 – 5)  
Prof. Han Shi, PhD (Sessions 6 – 10)

This course starts with a look at the evolving landscape of ESG (Environmental, Social, and Governance) regulations and market drivers and their profound impact on business strategies. Participants will explore how regulatory frameworks can present challenges and risks, as well as opportunities for innovation and competitive advantage in the sustainable economies of the future. Through a combination of lectures, real-world case studies, and engaging discussions, attendees will master strategic approaches to navigate regulatory complexities while simultaneously enhancing their business's environmental and economic performance. The course emphasizes sustainability-driven business model innovation, which involves reimagining traditional operations and strategies to integrate environmental and social considerations. A successful integration can simultaneously boost profitability and make a positive contribution to the planet and its inhabitants. Designed for leaders and business managers, this course provides the crucial knowledge and skills needed to adapt and excel in the increasingly sustainability-focused global markets.

## **Course Outline**

### **Session 1. Economic Analysis of Climate Change**

- Negative externality and market failure
- Tragedy of the Commons
- Tragedy of the Horizon

#### **Readings:**

Cabolis, C., Lavanchy, M., & Schmedders, K. (2023). The fundamental problem with ESG? Conflicting letters. *Journal of Financial Transformation* 57, 1010–1017.

Schmedders, K. (2023). The chickens are coming home to roost: Companies admit their climate promises were unrealistic. *IbyIMD*. <https://www.imd.org/ibyimd/sustainability/the-chickens-are-coming-home-to-roost-companies-admit-their-climate-promises-were-unrealistic/>.

### **Session 2. Economic Solutions & Challenges**

- Carbon pricing
- Cooperation
- Managerial incentives

Readings:

Barge F., & Schmedders, K. (2023). Executive pay: balancing sustainability with profitability. *IbyIMD*. <https://www.imd.org/ibyimd/leadership/executive-pay-balancing-sustainability-with-profitability/>.

Schmedders, K. (2023). Fighting climate change may be right, but it also needs to be fair. *IbyIMD*. <https://www.imd.org/ibyimd/sustainability/fighting-climate-change-may-be-right-but-it-also-needs-to-be-fair/>.

**Session 3. Climate-financial Risks: Metrics and Targets, Risk Management**

- Transition risks
- Physical risks
- Financial impact

Reading:

Witik, R., & Schmedders, K. (2024). How regulation is shaping the future of ESG ratings and sustainable investments. *IbyIMD*. <https://www.imd.org/ibyimd/sustainability/how-regulation-is-shaping-the-future-of-esg-ratings-and-sustainable-investments/>.

**Session 4. Climate-financial Risks: Strategy, Governance**

- TCFD report
- Risks and opportunities
- EU Carbon Border Adjustment Mechanism

Reading:

Schmedders, K. (2024). Integrating Sustainability for Long-Term Business Resilience and Value Creation. *Global Banking and Finance Review*. <https://www.globalbankingandfinance.com/integrating-sustainability-for-long-term-business-resilience-and-value-creation/>.

Optional Reading:

Enders, A., Lontzek, T., Schmedders, K., & Thalhammer, M. (forthcoming). Carbon risk and equity prices. *The Financial Review*.

**Session 5. Case Study on EU ECBAM**

- Effects of EU CBAM
- Managing policy risk

- Market changes

Case Study:

Trifilo, A., Laffely, C.L., Knell, L., Hirschi, M. & Schmedders, K. (2024). Navigating the EU CBAM: Ensuring Competitiveness and Profitability for Emirates Global Aluminium. IMD Lausanne, Switzerland.

## **Session 6. Corporate Sustainability Strategy and Management**

- Corporate purpose, vision, and mission
- Stakeholder engagement and materiality assessment
- ESG risk management, metrics, and targets
- Integration of ESG into corporate strategy

Case Study:

Stephanie Bertels, Lisa Papania and Ahmed Amlani (2015). *Teck's Development of a Strategy for Sustainability*. The Embedding Project.

[https://embeddingproject.org/pub/resources/EP\\_Teck-Strategy-for-Sustainability.pdf](https://embeddingproject.org/pub/resources/EP_Teck-Strategy-for-Sustainability.pdf)

Reading:

Chakravorti B. *What businesses need to know about sustainable development goals*. Harvard Business Review. Available at: <https://hbr.org/2015/11/what-businesses-need-to-know-about-sustainable-development-goals>, 2015.

## **Session 7. ESG Reporting**

- Mainstream ESG disclosure frameworks and standards (GRI, SASB, CDP, TCFD, ISSB)
- Company sustainability disclosure in China and globally
- Development and evaluation of sustainability Reporting

Reading:

Barker, Richard, Robert G. Eccles, and George Serafeim. "The future of ESG is... accounting." *Harvard Business Review* (2020).

## **Session 8. ESG Investing**

- ESG frameworks and standards
- Leading ESG rating schemes (MSCI, Sustainalytics, S&P)
- ESG investing

Reading:

Kotsantonis, Sakis, Chris Pinney, and George Serafeim. "ESG integration in investment management: Myths and realities." *Journal of Applied Corporate Finance* 28.2 (2016): 10-16.

**Session 9. Business Model Innovation for Sustainability**

- Six capitals of value creation for sustainability
- Circular economy and business model innovation
- Net-zero transition and business model innovation

Reading:

Frishammar, Johan, and Parida, Vinit. "The Four Fatal Mistakes Holding Back Circular Business Models." *MIT Sloan Management Review*; Cambridge Vol. 62, Iss. 3, (Spring 2021): 68-72.

**Session 10. Final Group Project Presentation and Course Wrap-up**

No new content will be taught. The course will conclude after the group project presentations.

**GRADING / ASSESSMENT**

The assessment is composed of three components:

**1. Class Participation (5% for Session 1-5; 5% for Session 6-10)**

**2. Class Attendance (10%)**

**3. Case Contribution (2 X 15%)**

Active preparation and participation are crucial for effective learning, especially in a case-based teaching environment. Class contribution will be evaluated based on the following five qualitative criteria:

- **Participation:** The level of involvement in class discussions.
- **Relevance:** The ability to provide pertinent insights related to the topic at hand.
- **Advancement:** Contributions that move the discussion forward or deepen the analysis.
- **Evidence-Based:** Providing data, examples, or references to support arguments.
- **Logical:** Demonstrating clear, coherent, and structured reasoning in contributions.

Case studies will be conducted during **Sessions 5 and 6**, focusing on various aspects of corporate sustainability.

#### 4. Group Oral Presentations on Company Case Studies (20%)

Six students will form a group and select a company from the following list of potential options: Nio, XPeng Inc., Midea, Tianqi Lithium, Ping An Group, ByteDance, Swire Property, Towngas, Ant Group, and others. Alternatively, student groups may choose an international company with prior approval from the course instructors. Throughout the course, students will assess various aspects of corporate sustainability, with an emphasis on SDG integration, climate mitigation, and resilience strategies. In this process, students will act as external consultants, providing recommendations on how to improve the performance of their selected companies.

The group project will culminate in an oral presentation during **Session 10**, scheduled for **December 11, 2024**. Each group will prepare a PowerPoint presentation consisting of approximately **8-10 slides** addressing the following key questions:

1. How does the company integrate the SDGs into its sustainability practices?
2. Does the company's approach **to** implementing sustainability goals and addressing climate change create strategic value? If so, how and for whom is value created?
3. Evaluate the strengths and weaknesses of the company's engagement with the SDGs and climate change, considering all three dimensions of sustainability: environmental, social, and economic.
4. What specific recommendations can you make to enhance the company's sustainability management practices?

Each group will deliver a **7-minute** oral presentation, followed by a **3-minute Q&A** session to encourage feedback and promote mutual learning. The final PowerPoint slides must be submitted to the Canvas after the presentation.

#### 5. Group Company Case Reports (30%)

Building on the feedback from the Group Oral Presentations, each team will submit a comprehensive written case report on their selected company. The report should critically assess the company's corporate sustainability management practices, identify strengths and weaknesses, and propose recommendations for future improvements. The written report must be at least 3,000 words in length and should include charts, graphs, and other relevant exhibits to support the analysis.

Your group case reports must be submitted via Canvas **by 11:59 PM on December 22, 2024**. Late submissions will not be accepted or graded.

## FACULTY COUNCIL SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Schulich Faculty Council for the 2024-25 academic year  
was held via Zoom on **Friday, March 7, 2025** from **11:30am – 1:00 pm**.

### MINUTES

#### In Attendance:

**Chair:** W. Shen

**Vice-Chair:** vacant

**Secretary:** K. Doyle

**Assistant:** S. Hyde

#### **Voting Members of Faculty Council Present:**

Senior Admin	D. Zwick, K. Tasa, A. Joshi		
ACTG	M. Bamber, S. Hsu, A. Mawani, G. Saxton, X. Su, L. Thorne, V. Trivedi		
ARTM	K. Rogers		
ECON	B. Wolf		
ENTR			
FINE	P. Foroughi, M. Kamstra, M. Milevsky, L. Ng, A. Rzezniak, Y. Tian		
MKTG	E. Fischer, A. Joshi, T. Noseworthy, D. Zwick		
MREI	L. Rolheiser		
ORGS	C. Bell, I. Hideg, B. Lyons, R. Shao, W. Shen, K. Tasa		
OMIS	M. Biehl, A. Diamant, H. Kim, D. Oppong-Tawiah		
PLCY	M. Majzoubi, C. McMillan, T. Peridis, O. Weber		
PROP			
SUST	G. Kistruck, M. Valente		
Voting CPM's & Director of 601	L. Hillcoat, I. Holzinger, H. Sinker, H. Telluja, J. Yeung Do		
Student Reps			

#### **Voting Members of Faculty Council Absent:**

P. Aulakh	J. Darroch	R. Irving (ret.)	J. McKellar	W. Sheremata
E. Auster	A. DeCarufel (ret.)	D. Johnston	D. Matten	P. Shum-Nolan
K-H. Bae	Y. Deutsch	K. Kanagaretnam	N. Mead	A.J. Sirsi
T. Beechy (ret.)	A. Devine	R. Karambayya (ret.)	P. Mehra (GBC)	J. Tan
R. Belk	V. Dhingra	A. Kecskes	G. Morgan (ret.)	A. Utsav (UBS)
A. Bhanich-Supapol	D. Dimick (ret.)	M. Kipping	D. Neu	E. Veresiu
I. Bicer	M. Dong	M. Kristal	C. Oliver (ret.)	M. Voronov

A. Campbell	J. Everett	Y. Larkin	G. Packard	S. Weiss (ret)
M. Cao	B. Gainer	P. Laycock (Alum)	Y. Pan	T. Wesson (ret.)
C. Cho	M. Giesler	F. Lazar	R. Phillips	E. Westney (ret.)
M. Chowdhury (UBS)	C. Graham	M. Levesque	E. Prisman	L. Wright (ret.)
J. Clayton	I. Henriques	G. Li	A. Rahaman	J.S. Yeomans
W. Cook (ret.)	D. Horvath (ret.)	A. Liann (Lib. Rep.)	M. Rice	J. Zemans (ret.)
A. Coutts	C. Huang (PH.D)	I. Macdonald (ret.)	H. Rosin (ret.)	L. Zhu
P. Darke	R. Imanirad	A. Madhok	P. Sadorsky	

#### Leaves and Sabbaticals:

M. Annisette	M. Farjoun	J. Rungtusanatham		
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#### Non-Voting Members of Faculty Council Present

S. Calahan	A. Ferreira	T. Medcof	N. Sutherland
M. Collyer	I. Holzinger	C. Niederwanger	A. Welsh
K. Doyle	S. Kerr	L. Pan	F. Zandi
J. Fayt	B. Kha	J. Pinto	M. Zelter

#### Non-Voting Members of Faculty Council Absent:

B. Abtan	A. Fisher	L. Lee	S. Penwarden	M. Waxman
W. Al-Hussaini	S. Friedman	D. Lennox	P. Pivato	D. Woticky
N. Alexandrian	B. Gallagher	R. Lynn	J. Pokrajac	R. Young
S. Babra	A. Garber	P. Macdonald	S. Pulver	W. Zhang
D. Barret	S. Gargaro	Y. Massop	C. Sachs	C. Zhuang
M. Bhutani	T. Gosse	N. Machado	G. Sanchez Cuevas	
S. Browne	C. Gray	J. Mapa	V. Shanmuganathan	
K. Butzek-Morris	J. Guo	D. Mak	C. Sicoli	
C. Carder	C. Hardman	R. Mayer	A. Sriharan	
M. Cernea	A. Harris	T. McQueen	T. Stubbs	
J.M. Clark	B. Hrehoruk	G. Milavsky	S. Thomas	
M. De Luca	C. Hui	M. Morriello	A. Thomson	
L. De Wilde	S. Hussain	C. Mueller	T. Talias	

G. Deans	V. Ivankine	K.R. Na	H. Turesson	
P. Dillon	K. Kim	Z. Necas	K. Vandezande	
K. Elliot	A. Konson	C. Partland	A. Visram	
K. Ellis	H. Koren-Cohen	B. Pasquali	A. Volodina	
D. Elsner	L. Lakats	G. Pau	P. Walker	

### 1. Welcome and Chair's Remarks (2 minutes)

The Chair calls the meeting to order at 11:31 am and reads the Land Acknowledgement.

### 2. UBS, GBC, PhD Student Remarks (10 minutes)

H. Telluja presents the finalized GBC vision statement. UBS and PhD students had no remarks.

### 3. Dean's Remarks (15 minutes)

The Dean congratulated the Schulich Venture Academy for its recent award of 3 million dollars to expand in areas such as electric vehicles, AI, green and clean technologies.

The Dean offered remarks about the significance of International Women's Day and events happening around the School to celebrate it.

Net Impact Schulich Chapter was the 2024 chapter of the year. Our chapter is one of 300 operating in 40 countries. The Schulich chapter increased its membership by 67% in 2024.

Schulich case teams advance to finals: L'Oreal, SFU, Canadian Case Series, and the Canadian Marketing League Competition.

Congratulations to the accreditation unit- Markus Biehl, Yvonne Massop, and Simon Lee- for their work to highlight that Schulich is number one in Canada for both the number of field weighted citations and the number of publications in top 10 journals.

A reminder that there is now a turn-key fireside chat space available for anyone at Schulich who wants to host a guest speaker or an event of 40-50 seats.

A reminder of the call for nominations to Chair the Committee on Community and Equity at Schulich. Please send nominations to Ashwin Joshi, Chair of the Nominating Committee.

### 4. Faculties of the Future Consultation (L. Philipps) (60 minutes)

See the slide deck included in today's agenda package.

Comments and questions from Schulich councilors included:

- a request for a more comprehensive overview of the status of administrative restructuring and reduction—including the number and type of administrative positions being closed;
- a suggestion that the collegium needs more information and discussion about what programs, units, roles are needed and to not base decision-making on merging weak units that could be closed;
- the resistance from Schulich to suggestions about merging or reorganization emerge from a spirit of entitlement that we should be able preserve our autonomy because we have been and continue to be proactive in closing, renewing, and establishing programs, services, and roles to meet demand and societal needs.
- nervousness about the possibility that Schulich would absorb other faculties or units. There is a culture of collegiality and professionalism at Schulich that we want to maintain by being selective about who we invite to join us.
- A remark from the Dean that the conversation about unit restructuring is not as simple as finding like-minded faculty who want to innovate and collaborate with us—it's cultural more than structural.
- Concern about how restructuring might further confuse the current status in terms of how many units offer business programming. It's already confusing for students to navigate—is there a mechanism that would allow collaboration while offering more clarity?
- A suggestion that one way reorganization might be led is by thinking about unifying experiences for students, staff, and faculty. Because York is a commuter campus, students do not really have a strong sense of identity from the institutional level; it's created in the local context.

## **5. Other Business**

None

## **6. Adjournment**

Meeting adjourns at 1:02 pm.