EXECUTIVE COMMITTEE
SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Executive Committee of Faculty Council for the 2024-25 academic year will be held remotely (via Zoom) on Friday, November 28 at 11:30 am.

AGENDA

		Page
1.	**Welcome & Chair's Remarks**	
2.	**Review of November Faculty Council Agenda and Documentation**	2-576
3.	**Student Appeal #3508**	Via email
4.	**Other Business**	
5.	**Adjournment**	

CONSENT AGENDA

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

1. **Minutes of the last meeting**: 2025.10.31 577-578

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, December 12, 2025** from **11:30am – 1:00 pm**.

AGENDA	**Page**
1. **Welcome and Chair's Remarks** (5 minutes)	
2. **UBS, GBC, PhD Student Remarks** (10 minutes)	
3. **Dean's Remarks** (15 minutes)	
4. **Launch of the Schulich Teaching Innovation Studio** (*S. Friedman* & *T. Back*) (30 minutes)	
5. **APPRC Consultation on the University Academic Plan 2025-30** (*S. Trivedi*)	p. 4-5
6. **Other Business**	
7. **Adjournment**	

Consent Agenda

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

	Page
For Information: Senate Synopsis 2025.11.27	forthcoming
1. **Nominating Committee** (*A. Joshi*)	
a. Nominating Committee Slate as of 2025.12.01	forthcoming
2. **BBA Committee** (*B. Eberlein*)	
a. **Course Change Proposals**	
i) SB/ACTG 3110 3.00 Intermediate Financial Accounting I (*delivery mode)*	6-49
ii) SB/ACTG 3120 3.00 Intermediate Financial Accounting II (*delivery mode*)	50-93
iii) SB/ACTG 4600 3.00 Accounting Standards and Applications (*delivery mode*)	94-112
iv) SB/ACTG 4710 3.00 Introduction to Income Taxation (*delivery mode*)	113-133
v) SB/ACTG 4720 3.00 Advanced Income Taxation (*delivery mode*)	134-157
vi) SB/GBUS 3200 3.00 Managing Global Business Activities (*pre-requisite)*	158-162
vii) SB/ORGS 4600 3.00 Diversity and Inclusion in Organizations (*course title; pre-requisite)*	163-182
viii) SB/SGMT 4300 3.00 Strategic Thinking Skills (*pre-requisite)*	183-203
b. **For information:** Articulation Agreement with the Government of Nunavut	204-210

3. **Master Programs Committee** (*K. Tasa*)

a. **Tech MBA** (*M. Kristal)*

i) **Detailed Minor Modification** (*part-time option; increase in credits; changes to the core*) 211-222

ii) **New Course Proposals**

a) SB/OMIS 5310 1.50 Data Analytics for Business Leaders a223-247
b) SB/OMIS 5311 1.50 Enterprise Risk Management b248-267
c) SB/OMIS 5400 1.50 Business Intelligence with Database Applications c268-283
d) SB/OMIS 5401 1.50 Technology Enabled Operations Management d284-300
e) SB/OMIS 6015 1.50 Strategic Consulting in Technology Context e301-327
f) SB/OMIS 6016 1.50 Technology Project Management f328-351
g) SB/OMIS 6018 1.50 Modern IT Architecture g352-370
h) SB/OMIS 6621 1.50 Design Thinking for Innovation h371-396
i) SB/OMIS 6631 1.50 Storytelling with Data i397-418
j) SB/MGMT 5400 1.50 Technology and Global Competition j419-437
k) SB/MGMT 6010 1.50 Introduction to Business Contracts k438-460
l) SB/ECON 5111 3.00 Markets, Firms, and the Global Economy l461-484
m) SB/MKTG 5210 3.00 Product Management m485-506
n) SB/OMIS 6010 4.50 Technology Consulting Project n507-525

iii) **Course Change Proposals**

a) SB/MGMT 6110 6.00 Venture Studio (*credit weight)* a526-554
b) SB/OMIS 6640 1.50 Leveraging AI in Organizations (*title change*) b555-566

b. **Master of Accounting** (*S. Trivedi*) i567-572

i) **Course Change Proposal** (*delivery mode*)

a) SB/ACTG 5101 3.00 Financial Accounting Fundamentals
b) SB/ACTG 5211 3.00 Management Accounting Fundamentals
c) SB/ACTG 6120 3.00 Intermediate Financial Accounting I
d) SB/ACTG 6140 3.00 Intermediate Financial Accounting II
e) SB/ACTG 6710 3.00 Introduction to Income Taxation

4. **Minutes of the Last Meetings:** 2025.11.14 573-576

York University Senate

Academic Policy, Planning and Research Committee

Memorandum

To: Chairs, Senate Committees
Chairs, Faculty Councils

From: Monique Herbert, Chair, Academic Policy, Planning and Research Committee

Date: 11 November 2025

Subject: **University Academic Plan 2025-2030 Consultations**

The process leading to approval of the succeeding University Academic Plan is now underway. As the most important bodies in collegial governance, Senate committees and Faculty Councils are key contributors to the preparation of the 2025-2030 UAP, and the *Academic Policy, Planning and Research Committee* of Senate (APPRC) seeks your input on the approach to the development of the next Academic Plan.

A critical feature of the process to develop the University Academic Plan is consideration of the primary determinants that should inform the framing and content of the Plan, specifically:

- the current academic planning landscape, both internal and external to the University; what initiatives are in-progress and continuing; what imminent new opportunities are on the horizon; any post-secondary sector opportunities and challenges
- Progress made and challenges encountered on achieving the priorities in the current 2020-2025 UAP
- Longer-term aspirations of where the University wants to be in 5-10-20 years

APPRC has broadly considered these determinants. It also discussed this context with the Deans/Principal in a consultation exercise last spring to receive their views and ideas for the succeeding Academic Plan. From these discussions, APPRC is recommending that:

The approach to the next UAP should:

- **be the preparation of an <u>updated version of the current Plan</u> that sustains the core broad priorities while introducing room for bold strategies that focus on York's relevance as an institution of higher learning and that demonstrates its relevance locally and globally.**
- **acknowledge the ongoing uncertainty in the post-secondary sector and the need to be able to respond to rapidly changing circumstances, while also building on York's strengths to achieve its academic goals.**

UAP Community Consultation

APPRC is commencing a community consultation exercise to gather views on this proposed framing for the next UAP. An open planning forum will feature as one of the modes of gathering input from the collegium on this recommendation. That event is being held on **Thursday, November 27, 2025, from 9:30 – 12:00pm** in the **Dr Robert Everett Senate Chamber.**

The Committee is also requesting that Senate Committees and Faculty Councils include time on a November or early December meeting agenda to discuss this recommendation aided by a brief set of framing questions set out below. Faculty Council Secretaries are kindly requested to advise the APPRC Secretary, Cheryl Underhill, of the timing of these discussions to allow for the Faculty-designated member of APPRC to help facilitate the discussion at Council. APPRC is cognizant of the constraints on your time and agendas and understands that it may not be possible for discussion of the questions at length. In view of this, each Senate committee or Faculty Council may wish to encourage members to submit supplementary feedback via email to Senate.

Framing Questions for Committee and Council Discussions

- What aspects of the current UAP are outdated and need updating?
- What work on priorities is progressing well and indicates potential for continuity?
- What are the most important opportunities for the University to seize over the next five years?
- What role should the UN SDGs framework should play going forward in defining York's University Academic Plan?

A **UAP Renewal** website has been created that provides background material for review in preparation for these discussions. The documents available on the site are helpful as a collective to reflect on the current academic planning landscape.

Kindly submit your completed responses to the Secretary of APPRC no later than January 5, 2026.

Thank you in advance for your vital assistance.

cc: Lisa Philipps, Provost and Vice-President Academic
Cheryl Underhill, Secretary, APPRC

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Abu Rahaman, Accounting Area Representative on the BBA Committee
Date: November 3, 2025
Re: ACTG 3110 3.0 - Add a Blended Format of Course Delivery

Motion:

Faculty Council approves the proposal to add a blended format of course delivery for the following course in the BBA program: ACTG 3110 3.0, Intermediate Financial Accounting I.

Rationale:

In Fall 2025 senior year accounting students' requested that the course delivery for this course be changed to blended, and in particular to deliver the technical component of the course online. In response, and with ADA permission, this course was delivered, with permission, in a blended format, to assess the impact. At the end of the semester, we obtained feedback from students and instructors, and all was overwhelmingly positive, as evidenced by the increase in class attendance that is now over 95% and there also was a consistency in course grades.

The blended teaching format facilitates course content being taught online as well as in the in-person depending upon the most appropriate mode of the content. Learning outcomes for this course have not been altered. What we have already learned is that some types of learning are better accommodated inperson and others online: For example, interactive learning that can include introduction of new material and case study discussions, appear to be better delivered in person; however, the technical accounting applications appear to be better absorbed by students through online sessions.

In conclusion, taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further evaluate how different types of content, formats, and techniques encourage students learning and engagement. Our request also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

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York University

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   Schulich BBA Program

2. Responsible Unit:
   ACTG

3. Subject Code (Rubric) and Course Number:
   ACTG 3110

4. Credit Value:
   3.00

5. Long Course Title:
   Intermediate Financial Accounting I

6. Short Course Title:
   Intermediate Financial Accounting I

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

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

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

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

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In conclusion, taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further evaluate how different types of content, formats, and techniques encourage students learning and engagement. Our request also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

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):

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Mode of delivery: in person	Mode of delivery: in person, blended Changes to the course syllabus are reflected in the attached updated syllabus. Course title, description, and learning outcomes remain identical to the existing course information

11. Enrolment Notes:
n/a

12. Consultation:
n/a

Originator:

Signature	November 3, 2025 Date
Abu Rahaman Name	ACTG Area or Specialization

Approvals:

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

Signature	Nov. 3, 2025 Date
Linda Thorne Name	ACTG Area or Specialization

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

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Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA, iBBA Programs
Name of Program Director	Program

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

Schulich School of Business

ACTG3110 F2025 **CREDITS: 3.00**

ACTG 3110 A - INTERMEDIATE FINANCIAL ACCOUNTING I

FRI 08:30-11:20 SSB N107

Lab Schedule

MON 17:30 - 18:50 ONLINE

Office Hours

By appointment - before or after class. | Room: S344D SSB

COURSE DIRECTOR

Alexander Fisher

afisher@schulich.yorku.ca

416.736.2100 Ext. 44610

S344D SSB

ADMIN

Roberta Parris-Toney

parris@schulich.yorku.ca

S344K SSB

This course is the conceptual and applications portion of a two-course sequence that deals with what has traditionally been called "intermediate financial accounting".

Financial accounting as it exists today involves reporting to persons who are entitled to receive financial statements as a result of clauses in Companies Acts, Securities Acts, and contractual financing arrangements. It may also include reporting by the executive committee or leadership of unincorporated businesses to various users, as well as in a variety of other situations. The type and detail of reporting can vary considerably from situation to situation. Financial accounting in most organizations tends to be based on one of:

1. Cash basis of accounting
2. Accrual basis of accounting
3. GAAP – international financial reporting standards (Part I – CPA Canada Handbook)
4. GAAP – accounting standards for private enterprises (Part II – CPA Canada Handbook)
5. Disclosed basis of accounting

These models capture some types of transactions and events and do not capture a variety of other transactions and events. A financial accounting report may therefore have very limited use. Any decision-maker has to know what the financial statement conveys, and what it hides, omits or compresses.

Classes

The course will consist of twelve (12) separate 3-hour classes. Classes are live, in-person, on campus. Classes are not recorded or "streamed" live virtually.

To obtain the maximum benefit from classes, reading the assigned chapter and associated material beforehand is essential. Failure to do so may result in a student's inability to fully understand the lecture and participate in related class activities (e.g, group discussion) causing the student to potentially feel "lost" or "overwhelmed". Therefore, advance preparation is essential.

Labs

In addition to classes, students will attend a series of labs. Each lab is scheduled for 90 minutes. Labs are conducted virtually, in a live and synchronous manner, over Zoom. Labs are never recorded - therefore scheduled attendance is

necessary.

Labs are an essential part of the course. A student's success in the course is highly dependent on their understanding of both theoretical and applied aspects of accounting. Lab questions are required to be completed for each lab as outlined in the course syllabus. Labs are meant to provide students the opportunity to practice and apply their technical skills – a fundamental skill required for success in the course. There is a specific lab assigned for each section. You need to attend the lab related to your section. You cannot attend a different lab.

To promote an engaging environment, students are expected to have their camera on throughout the entire lab. If a student's home environment is not conducive to having the camera on (e.g., noise, privacy), the student should go to the allocated classroom at Schulich (N105 SSB) which will provide the student a suitable environment to have their camera on.

The lab for this course will be conducted as virtual, synchronous meets. For more details, please refer to Canvas

ALEX FISHER - INSTRUCTOR

Alex Fisher is an Adjunct Professor of Accounting and has taught at Schulich since 2008. Alex was awarded the Seymour Schulich Award for Teaching Excellence in 2013, 2015, 2019, 2022 and 2025.

BRIEF DESCRIPTION

Examines the concepts, objectives and techniques underlying asset valuation and income determination, including alternative asset measurement bases and accounting for changing prices. The course has a decision orientation. Special emphasis is placed on accounting policy choices and the criteria by which such choices are made, as well as on analyzing financial statements prepared under differing accounting policy alternatives. Note: Not available to exchange students visiting Schulich. Open to Schulich undergraduate students with minimum Year 3 academic standing. Prerequisite: SB/ACTG 2011 3.00

COURSE LEARNING OUTCOMES

Overall, this course will endeavor to give students the knowledge they need to:

- select accounting policies and measurements that are appropriate to the specific business and stakeholder context of the reporting enterprise;
- understand the technical issues involved in measuring the asset amounts on the balance sheet (and their corresponding impacts on the income statement, statement of comprehensive income and cash flow statement), and understand what the amounts do and do not measure;
- interpret, 'dissect' and recast financial statements in order to see through attempts by preparers to lead users toward certain conclusions; and
- understand the differences in the accounting between the international financial reporting standards (Part I of CPA Canada Handbook) and the accounting standards for private enterprises (Part II of CPA Canada Handbook).

COURSE MATERIAL

The following course materials are required:

Textbook:

Intermediate Accounting Volume 1

9th Edition with Connect & Learnsmart PPK By: Thomas H. Beechy, Joan E. Conrod, Elizabeth Farrell, Ingrid McLeod-Dick, Marisa Morriello, Naomi Paisley, Romi-Lee Sevel, Kayla Tomulka Copyright 2025, McGraw Hill

The textbook is available in both hard-copy and electronic format; however, in either case, you must have Connect access for this course.

You must purchase the **nineth edition** (**2025**) of the text since it includes the most up-to-date international financial reporting standards and the accounting standards for private enterprises. Do not purchase previous editions as they are out of date.

The text is available for purchase from the York University bookstore.

Purchase Options

Option #1 – Hard-copy textbook with Connect - Intermediate Accounting Volume by Beechy 9th edition (Volume 1) with Connect - ($159.95)

Option #2 – Electronic textbook with Connect (includes the electronic version of the textbook and Connect) – Intermediate Accounting Volume by Beechy 9th edition (Volume 1) - ($99.00)

To purchase online:

1. Go to the bookstore link - **https://campus.bookstore.yorku.ca/adoption-search (https://urldefense.com/v3/__https://campus.bookstore.yorku.ca/adoption-search__;!!BlJO!m5hE8WahdJXi7B3acJ0K3b0gwqdNsApVdfTsZhEUnRt2CTUC0JhvymgmXWwbYKIaKM0WoRXtXttoL1ao6QDP6**
   your section of the course
2. Locate your course code from the course list. Once select your course, click “Begin Shopping”.
3. You will be brought to a screen that lists the CONNECT option for your course.
4. Click “Add to Cart” to add Option #1 or Option #2 to your cart.
5. Next, click “View Cart & Checkout” and proceed to checkout.

Once you have completed your purchase, you will receive an email with a 10-digit registration code to input into Canvas (i.e., once prompted with a “Enter your registration code” box). It is important you retain your 10-digit registration code.

If you need help registering, access the following resources:

- Guide - “Introduction to Intermediate Accounting: How to register for CONNECT in Canvas” document in Canvas posted under “Announcements”.
- Video - Video walk-through on how to register for CONNECT through Canvas, please go: **https://www.mheducation.com/highered/support/connect/first-day-of-class/canvas.htmlLinks to an external site.Links to an external site. (https://urldefense.com/v3/__https:/www.mheducation.com/highered/support/connect/first-day-of-class/canvas.html__;!!BlJO!mXHs2OBe8vsPQTgpRmHIgVWoXFORv9uF4DtQ_3PBn8WvUegRHncCHtlC-oUqSX4DqId25wCdgYcJSFyIGbyTATnZzVFC2R5-vpw$)**
- Webpage – McGraw Hill Connect also has a support page which includes helpful videos on registration as well as live technical support: **https://mhedu.force.com/CXG/s/Links to an external site.Links to an external site. (https://urldefense.com/v3/__https:/mhedu.force.com/CXG/s/__;!!BlJO!mXHs2OBe8vsPQTgpRmHIgVWoXFORv9uF4DtQ_3PBn8V oUqSX4DqId25wCdgYcJSFyIGbyTATnZzVFCOw23Ems$)**

Annual report:

2023 Maple Leaf Foods Annual Report (available on internet for access and download).

Technology:

Students are expected to have access to the following technology:

1. Laptop - A laptop is expected for in-person assessments. No other devices such as a cell phone will be allowed. The laptop should be capable of running various applications (including Microsoft Word and Excel, Canvas, Zoom and an internet browser that can access the internet). It is the responsibility of the student to bring their device, including all accessories (i.e. power cord, external calculator) to all in-person classroom assessments. Students are responsible for ensuring their device is operational and has a full charged battery for the duration of the assessment.

2. Laptop Camera (Webcam) - A digital laptop camera that captures video and audio data and transmits it in real-time. To be used during all labs.

3. Microsoft Word & Excel - Should you require Microsoft products, all registered York student have access to FREE Microsoft Office software available at the following site: https://www.yorku.ca/uit/student-services/software/

4. Internet - Students are expected and assumed to have reliable high-speed internet access.

Canvas & Additional Readings:

Canvas will be used as a central bulletin board on which the instructor can make announcements and post relevant course materials. You are expected to check Canvas at least twice each week. Any announcements that need to be made to the entire class will be posted to Canvas rather than sent in a blanket email. Any additional readings for each lecture will be posted electronically on Canvas. If you have any difficulty accessing Canvas, please contact askit@yorku.ca

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Connect Self Reflections 5%			
Self Assessment Quiz - Chapter 3		0.56%	Fri Sep 12, 2025 at 08:30am EDT
Self Assessment Quiz - Chapter 4		0.56%	Fri Sep 19, 2025 at 08:30am EDT
Self Assessment Quiz - Chapter 5		0.56%	Fri Sep 19, 2025 at 08:30am EDT
Self Assessment Quiz - Chapter 6		0.56%	Fri Sep 26, 2025 at 08:30am EDT
Self Assessment Quiz - Chapter 7		0.56%	Fri Oct 3, 2025 at 08:30am EDT
Self Assessment Quiz - Chapter 8		0.56%	Fri Oct 24, 2025 at 08:30am EDT
Self Assessment Quiz - Chapter 9		0.56%	Fri Oct 31, 2025 at 11:59pm EDT
Self Assessment Quiz - Chapter 10		0.56%	Fri Nov 7, 2025 at 08:30am EST
Self Assessment Quiz - Chapter 11		0.56%	Fri Nov 21, 2025 at 08:30am EST
Annual Report Questions 5%			
Annual Report Questions 1 - Chapter 3		0.63%	Fri Sep 12, 2025 at 08:30am EDT
Annual Report Questions 2 - Chapters 4 and 5		0.63%	Fri Sep 19, 2025 at 08:30am EDT
Annual Report Questions 3 - Chapter 6		0.63%	Fri Sep 26, 2025 at 08:30am EDT
Annual Report Questions 4 - Chapter 7		0.63%	Fri Oct 3, 2025 at 08:30am EDT
Annual Report Questions 5 - Chapter 8		0.63%	Fri Oct 24, 2025 at 08:30am EDT
Annual Report Questions 6 - Chapter 9		0.63%	Fri Oct 31, 2025 at 08:30am EDT
Annual Report Questions 7 - Chapter 10		0.63%	Fri Nov 7, 2025 at 08:30am EST
Annual Report Questions 8 - Chapter 11		0.63%	Fri Nov 21, 2025 at 08:30am EST
Lab Questions 5%			

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Lab 1		0.5%	Mon Sep 8, 2025 at 05:30pm EDT
Lab 2		0.5%	Mon Sep 15, 2025 at 05:30pm EDT
Lab 3		0.5%	Mon Sep 22, 2025 at 05:30pm EDT
Lab 4		0.5%	Mon Sep 29, 2025 at 05:30pm EDT
Lab 5		0.5%	Mon Oct 6, 2025 at 05:30pm EDT
Lab 6		0.5%	Mon Oct 27, 2025 at 05:30pm EDT
Lab 7		0.5%	Mon Nov 3, 2025 at 05:30pm EST
Lab 8		0.5%	Mon Nov 10, 2025 at 05:30pm EST
Lab 9		0.5%	Mon Nov 17, 2025 at 05:30pm EST
Lab 10		0.5%	Mon Nov 24, 2025 at 05:30pm EST
In-Lab Engagement 5% 2 lowest will be dropped			
In-Lab Engagement 1		0.63%	Mon Sep 8, 2025 at 05:30pm EDT
In-Lab Engagement 2		0.63%	Mon Sep 15, 2025 at 05:30pm EDT
In-Lab Engagement 3		0.63%	Mon Sep 22, 2025 at 05:30pm EDT
In-Lab Engagement 4		0.63%	Mon Sep 29, 2025 at 05:30pm EDT
In-Lab Engagement 5		0.63%	Mon Oct 6, 2025 at 05:30pm EDT
In-Lab Engagement 6		0.63%	Mon Oct 27, 2025 at 05:30pm EDT
In-Lab Engagement 7		0.63%	Mon Nov 3, 2025 at 05:30pm EST
In-Lab Engagement 8		0.63%	Mon Nov 10, 2025 at 05:30pm EST
In-Lab Engagement 9		0.63%	Mon Nov 17, 2025 at 05:30pm EST

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
In-Lab Engagement 10		0.63%	Mon Nov 24, 2025 at 05:30pm EST
Assessments 80%			
Midterm Examination - Oct 10 - 8:30 a.m.		25%	Fri Oct 10, 2025 at 10:00am EDT
Technical Quiz - Nov 14 - 8:30 a.m.		25%	Fri Nov 14, 2025 at 10:00am EST
Final Examination		30%	
Additional Practice (Optional) 0%			
Practice Questions - Chapter 1		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice Questions - Chapter 2		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice Questions - Chapter 3		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice Questions - Chapter 4		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice Questions - Chapter 5		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice Questions - Chapter 6		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice Questions - Chapter 7		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice Questions - Chapter 8		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice Questions - Chapter 9		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice Questions - Chapter 10		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice Questions - Chapter 11		0%	Wed Dec 31, 2025 at 11:59pm EST
Academic Integrity Statement 0%			
Academic Integrity Statement		0%	Fri Sep 12, 2025 at 08:30am EDT
Course Evaluation Bonus 0%			
Course Evaluation Bonus		0%	

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Self Assessment Quiz - Chapter 3

Due Date: Fri Sep 12, 2025 at 08:30am EDT

Details available Fri Sep 5, 2025 at 12:00am EDT

Self Assessment Quiz - Chapter 4

Due Date: Fri Sep 19, 2025 at 08:30am EDT

Details available Fri Sep 5, 2025 at 12:00am EDT

Self Assessment Quiz - Chapter 5

Due Date: Fri Sep 19, 2025 at 08:30am EDT

Details available Fri Sep 5, 2025 at 12:00am EDT

Self Assessment Quiz - Chapter 6

Due Date: Fri Sep 26, 2025 at 08:30am EDT

Details available Fri Sep 5, 2025 at 12:00am EDT

Self Assessment Quiz - Chapter 7

Due Date: Fri Oct 3, 2025 at 08:30am EDT

Details available Fri Sep 5, 2025 at 12:00am EDT

Self Assessment Quiz - Chapter 8

Due Date: Fri Oct 24, 2025 at 08:30am EDT

Details available Fri Sep 5, 2025 at 12:00am EDT

Self Assessment Quiz - Chapter 9

Due Date: Fri Oct 31, 2025 at 11:59pm EDT

Details available Fri Sep 5, 2025 at 12:00am EDT

Self Assessment Quiz - Chapter 10

Due Date: Fri Nov 7, 2025 at 08:30am EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Self Assessment Quiz - Chapter 11

Due Date: Fri Nov 21, 2025 at 08:30am EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Annual Report Questions 1 - Chapter 3

Due Date: Fri Sep 12, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. How many EPS calculations are on the Consolidated Statement of Net earnings?
2. What adjustments are included in the Statement of Comprehensive Income?
3. What does it mean that some items may be reclassified to profit and loss and some are never reclassified to profit and loss?
4. What is accumulated other comprehensive income on the Statement of Changes in Equity?
5. What subtotals are on the Consolidated Statement of Net Earnings?
6. What is included in restructuring expenses?
7. Where are assets held for sale classified on the Consolidated Balance Sheet?

Annual Report Questions 2 - Chapters 4 and 5

Due Date: Fri Sep 19, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. How is the order determined on the Consolidated Balance Sheet for assets and liabilities?
2. What line items on the Balance Sheet are assets?
3. What are assets held for sale?
4. What is the Statement of Compliance? Which GAAP is used?

5. What are the different type of segments?
6. What is a contingency?
7. Who are the related parties? What type of compensation is disclosed?
9. Is the Statement of Cash Flows using the indirect or direct method?
10. Where are interest and dividends classified on the Statement of Cash Flows?

Annual Report Questions 3 - Chapter 6

Due Date: Fri Sep 26, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. What is the revenue recognition policy for sale of goods?
2. What is the accounting policy for sales incentives?
3. What is accounting policy for biological assets?
4. What are the different types of biological assets?

Annual Report Questions 4 - Chapter 7

Due Date: Fri Oct 3, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. What are types of accounts receivables?
2. How are accounts receivables aged?
3. What is the method of accounting for the sale of accounts receivable?

Annual Report Questions 5 - Chapter 8

Due Date: Fri Oct 24, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. What method is used to value inventory?
2. How is the cost of inventory determined?
3. What is included in the cost of inventory?
4. At what value are biological assets transferred into inventory?
5. What are the different types of inventory?
6. What account is used to record the write-down to inventory?

Annual Report Questions 6 - Chapter 9

Due Date: Fri Oct 31, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. What is included in property, plant and equipment?
2. What is included in intangible assets?
3. What is the accounting policy for borrowing costs?
4. What is the accounting policy for government incentives?

Annual Report Questions 7 - Chapter 10

Due Date: Fri Nov 7, 2025 at 08:30am EST

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. What is the impairment test for long-lived asset?
2. How much impairment is allowed to be reversed?
3. Where is depreciation recorded for assets used in production?
4. What depreciation method is used?
5. Which intangible assets are depreciated compared to only being tested for impairment?

Annual Report Questions 8 - Chapter 11

Due Date: Fri Nov 21, 2025 at 08:30am EST

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. When are companies consolidated?
2. What measurement categories are used for financial assets?
3. What are the types of hedges?
4. What is the accounting for derivatives if hedge accounting not used?
5. What type of risks are disclosed?

Lab 1

Due Date: Mon Sep 8, 2025 at 05:30pm EDT

Questions

- A1-5
- A1-13

- A2-11
- A2-12
- A2-21

Questions found in textbook.

Lab 2

⌛ **Due Date:** Mon Sep 15, 2025 at 05:30pm EDT

Questions

- A3-5
- A3-10
- A3-13
- TR3-12

Questions found in textbook.

Lab 3

⌛ **Due Date:** Mon Sep 22, 2025 at 05:30pm EDT

Questions

- A4-22
- A5-1
- A5-17
- A5-28
- A5-31

Questions found in textbook.

Lab 4

⌛ **Due Date:** Mon Sep 29, 2025 at 05:30pm EDT

Questions

- A6-1
- A6-15
- A6-27
- TR6-3

Questions found in textbook.

Lab 5

⌛ **Due Date:** Mon Oct 6, 2025 at 05:30pm EDT

Questions

- A7-1
- A7-5
- A7-15
- A7-35
- TR6-6

Questions found in textbook.

Lab 6

⌛ **Due Date:** Mon Oct 27, 2025 at 05:30pm EDT

Questions

- A8-1
- A8-10
- A8-27
- A8-37
- TR8-2

Questions found in textbook.

Lab 7

⌛ **Due Date:** Mon Nov 3, 2025 at 05:30pm EST

Questions

- A9-15
- A9-18
- A9-30
- A9-37
- A9-40

Questions found in textbook.

Lab 8

Due Date: Mon Nov 10, 2025 at 05:30pm EST

Questions

- A10-16
- A10-22
- A10-31
- A10-37
- TR10-10

Questions found in textbook.

- Live, in person, on campus

Lab 9

Due Date: Mon Nov 17, 2025 at 05:30pm EST

Questions

- Download here - **Case - Planes Ltd. (https://schulich.instructure.com/courses/13361/files/1500266?verifier=C8tjmrZP0HcslGOEpDCaSx3wms6E3isjwQIahiAC&wrap=1) (https://schulich.instructure.com/courses/13361/files/1500266/download?verifier=C8tjmrZP0HcslGOEpDCaSx3wms6E3isjwQIahiAC&download_frd=1)**

Lab 10

Due Date: Mon Nov 24, 2025 at 05:30pm EST

Questions

- Take-up Technical Quiz
- A11-1
- A11-32

Questions found in textbook.

In-Lab Engagement 1

⌛ **Due Date:** Mon Sep 8, 2025 at 05:30pm EDT

In-Lab Engagement 2

⌛ **Due Date:** Mon Sep 15, 2025 at 05:30pm EDT

In-Lab Engagement 3

⌛ **Due Date:** Mon Sep 22, 2025 at 05:30pm EDT

In-Lab Engagement 4

⌛ **Due Date:** Mon Sep 29, 2025 at 05:30pm EDT

In-Lab Engagement 5

⌛ **Due Date:** Mon Oct 6, 2025 at 05:30pm EDT

In-Lab Engagement 6

⌛ **Due Date:** Mon Oct 27, 2025 at 05:30pm EDT

In-Lab Engagement 7

⌛ **Due Date:** Mon Nov 3, 2025 at 05:30pm EST

In-Lab Engagement 8

⌛ **Due Date:** Mon Nov 10, 2025 at 05:30pm EST

In-Lab Engagement 9

⌛ **Due Date:** Mon Nov 17, 2025 at 05:30pm EST

In-Lab Engagement 10

⌛ **Due Date:** Mon Nov 24, 2025 at 05:30pm EST

Midterm Examination - Oct 10 - 8:30 a.m.

Due Date: Fri Oct 10, 2025 at 10:00am EDT

Refer to the Written Assignments section of the Course Syllabus for details.

Technical Quiz - Nov 14 - 8:30 a.m.

Due Date: Fri Nov 14, 2025 at 10:00am EST

Refer to the Written Assignments section of the Course Syllabus for details.

Final Examination

Refer to the Written Assignments section of the Course Syllabus for details.

The date of the final examination is scheduled by York University and will be posted to the York University website once available.

Practice Questions - Chapter 1

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Practice Questions - Chapter 2

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Practice Questions - Chapter 3

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Practice Questions - Chapter 4

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Practice Questions - Chapter 5

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Practice Questions - Chapter 6

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Practice Questions - Chapter 7

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Practice Questions - Chapter 8

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Practice Questions - Chapter 9

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Practice Questions - Chapter 10

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Practice Questions - Chapter 11

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Details available Fri Sep 5, 2025 at 12:00am EDT

Academic Integrity Statement

Due Date: Fri Sep 12, 2025 at 08:30am EDT

Please sign and upload the **Student Honor Statement - Intermediate Financial Accounting X.docx (https://schulich.instructure.com/courses/13361/files/1500513?verifier=1P1DKyWPy8xR3kBhBQEIj0adjCTYUot6YUxOyob5&wrap=1) (https://schulich.instructure.com/courses/13361/files/1500513/download?verifier=1P1DKyWPy8xR3kBhBQEIj0adjCTYUot6YUxOyob5&download_frd=1)** (Statement)This is a **required submission** and your attestation is **mandatory** for your assessments (e.g., Quizzes, Midterm and Final Examination) to be graded.

We understand university is challenging and you face many pressures, including those compounded by our current environment. Nonetheless, we would like stress that at Schulich there will be **zero tolerance** for cheating/plagiarism. For example, breaching academic honesty is as simple as sharing your answer (or part of an answer) to an assessment with a classmate, collaborating on a timed assessment (e.g., messaging answers or discussing questions over an app or phone), copying and pasting from another resource (e.g., internet) or your own work that you have prepared in advance.

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.

Note: You can sign the statement electronically or print it, physically sign it and upload it as a PDF. No pictures or images.

Course Evaluation Bonus

WRITTEN ASSIGNMENTS: EVALUATION

Before Class Assessments

All before class assessments must be completed individually and independently.

Connect Self-Reflections

Students will complete a series of Connect Self-Reflection questions in Connect. Students must access these questions through Canvas and complete them at their own pace anytime before the due date.

Connect Self-Reflection questions are graded but students will have three (3) attempts, to achieve the correct answer, for each question prior to final submission.

Students who do not complete an assessment by the due date, for whatever reason (including technology issues), receive a grade of zero - meaning they did not participate or engage in the learning process. Since this assessment is meant to encourage participation in the learning process in a *timely* fashion, there are no "make-up" assessments or extensions. Students either complete the assessment or not. Late submissions are not accepted.

To ensure timely completion, students are encouraged to plan their time accordingly. Do not wait until the last minute to complete each assigned assessment because undoubtably issues may arise (e.g., commitments, technology issues).

Annual Report Questions

For most classes, annual report questions are assigned and posted in Canvas. Students must complete and submit (upload) the assigned annual report questions through the "Assignments" function in Canvas prior to the start of that week's class. These questions will be discussed during the class.

You will need to go the Maple Leaf Foods website or sedarplus.ca to download the 2023 annual report for Maple Leaf Foods.

Annual report questions are graded for completion (i.e. a reasonable attempt to fully complete the questions with good faith effort) and not technical accuracy of the responses. Students who fully complete the assigned annual report questions with good faith effort will recieve full marks. There are no partial marks.

Students who do not complete the assigned annual report questions by the due date, for whatever reason (including technology issues), receive a grade of zero - meaning they did not participate or engage in the learning process. Since this assessment is meant to encourage participation in the learning process in a *timely* fashion, there are no "make-up" annual report questions or extensions. Late submissions are not accepted. Students either complete the annual report questions or not. There are no partial completion or partial grades.

To ensure timely completion, students are encouraged to plan their time accordingly. Do not wait until the last minute to complete each assigned set of annual report questions because undoubtably issues may arise (e.g., commitments, technology issues).

Lab Questions

For each lab, students are assigned specific lab questions to complete. Lab questions are listed in the Course Syllabus. Students must complete and submit (upload) the assigned lab questions through the "Assignments" function in Canvas prior to the start of that week's lab. These questions will be discussed during lab.

Lab questions are graded for completion (i.e. a reasonable attempt to fully complete the questions with good faith effort) and not technical accuracy of the responses. Students who fully complete the assigned lab questions with good faith effort will recieve full marks. There are no partial marks.

Students who do not complete the assigned lab questions by the due date, for whatever reason (including technology issues), receive a grade of zero - meaning they did not participate or engage in the learning process. Since this assessment is meant to encourage participation in the learning process in a *timely* fashion, there are no "make-up" lab questions or extensions. Students either complete the lab questions or not. Late submissions are not accepted. There are no partial completion or partial grades.

To ensure timely completion, students are encouraged to plan their time accordingly. Do not wait until the last minute to complete the assigned lab questions because undoubtably issues may arise (e.g., commitments, technology issues).

In-Lab Engagement

During each lab, students will have the opportunity to respond to two polling questions in Zoom, allowing them to earn engagement marks.

In total, there are 10 labs but only the student's 8 highest lab engagement marks will be considered. In other words, the lowest two lab engagement marks will not be counted. The selection of the two lowest lab engagement marks will be determined at the end of the course. If a student misses a lab or does not complete a polling question within a lab, regardless of the reason (e.g., sick, appointment, internet connectivity issues, personal commitment etc.), they will receive an engagement mark of zero because the student did not participate in the engagement opportunity.

The first polling question will be structured in a multiple-choice format and be technical in nature relating to the content covered in that lab. The second question will be qualitative and reflective in nature.

The first polling question will be launched in Zoom approximately half-way through the lab and the second polling question will be launched toward the end of the lab – however timing may vary slightly depending on the flow of the lab and therefore attendance throughout the lab is important. To alert students of an upcoming polling question, the lab instructor will make an announcement approximately 5 minutes before launching a polling question.

For each polling question, students will have 2 minutes to read and respond to that specific polling question. Once the question time is completed, the lab instructor cannot grant a student an additional opportunity to complete the polling question regardless of the reason (e.g., student missed question, student's computer froze, student internet connectivity issues, student was in the bathroom etc.). Once a question is done – it is done. Do not ask your lab instructor to make "exceptions" - out of fairness to other students, they cannot.

Camera-on

To be eligible to earn the in-lab engagement mark for each lab, the student must have their camera on *throughout* the entire lab - this is a prerequisite to be eligible to earn the in-lab engagement mark. If a student's home environment is not conducive to having the camera on (e.g., noise, privacy), the student should go to the allocated classroom at Schulich (N105 SSB) which will provide the student a suitable environment to have their camera on.

In-Person Assessments

Students will complete the following in-person assessments individually during the assigned time:

- Midterm Examination
- Technical Quiz
- Final Examination

Midterm Examination

This in-class, closed-book (i.e., no notes, aids, books, internet, or other materials), midterm (assessment) will be timed and comprise 3-5 questions. The assessment will be a mix of technical (numerical and/or analytical), qualitative (discussion), and a case scenario, covering all classes and labs prior to the assessment date (i.e., inclusive and cumulative) including all readings, handout material, and postings on Canvas.

The instructor will distribute the assessment questions in-class. Students will have 90 minutes to complete the assessment on a device (e.g., laptop). At the end of the assessment, students will submit their responses in a Microsoft Word document for marking via Canvas.

Absence from Midterm

Students who miss a midterm examination must contact their instructor within 24 hours and provide the instructor with documentation substantiating the reason for the absence. If a midterm is missed based on an acceptable documented reason, the weight of the midterm will be proportionally allocated among the rest of the in-person assessments (i.e., technical quiz and final examination). There is no "make-up" midterm.

Technical Quiz

This in-class, closed-book (i.e., no notes, books, aids, internet, or other materials), quiz (assessment) will be timed and comprise 3-5 questions. The assessment will focus on technical (numerical and/or analytical) questions covering all classes and labs prior to the assessment date (i.e., inclusive and cumulative) including all readings, handout material, and postings on Canvas. Questions will be similar to those practiced in labs and in Canvas.

The instructor will distribute the assessment questions in-class. Students will have 90 minutes to complete the assessment on a device (e.g., laptop). At the end of the assessment, students will submit their responses in a Microsoft Word document for marking via Canvas.

Absence from Quiz

Students who miss the quiz must email their course instructor within 24 hours and provide the course instructor with acceptable documentation substantiating the reason for the absence. If a quiz is missed based on an acceptable documented reason, the the weight of the quiz will be proportionally allocated among the rest of the in-person assessments (i.e., midterm and final examination). There is no "make-up" quiz.

Final Examination

This in-person, closed-book (i.e., no notes, books, aids, internet, or other materials), final examination (assessment) will be timed and comprise 4-6 questions. The assessment will be a mix of technical (numerical and/or analytical), qualitative (discussion), and a case scenario, covering all classes and labs prior to the assessment date (i.e., inclusive and cumulative) including all readings, handout material, and postings on Canvas.

Student will have 120 minutes to complete the assessment on a device (e.g.. laptop). At the end of the assessment, students will submit their responses in a Microsoft Word document for marking via Canvas.

Absence from the Final

Refer to the “Schulich Policies” section in the Course Syllabus in Canvas.

Assessment Instructions - Relevant for Each In-Person Assessment

You are expected to have a device, such as a laptop, to be used during each in-person assessment. You must bring your device, including any necessary accessories (e.g., power cords), to each in-person classroom assessment. You are responsible to ensure your device is operational and has a fully-charged battery. You may also want to bring a basic standard calculator.

Before the Assessment

- Ensure your laptop screen is not set to “dark mode” (i.e., the background screen color is not dark or in a dark “theme”.).
- You will be asked to download a Microsoft Word and an *optional* Excel document from Canvas. You must use this Microsoft Word document, and only this specific Microsoft Word document, to write your responses. The Excel document provided is for optional use - for calculations, which will need to be copied and pasted into the Microsoft Word document. Work submitted on any other document(s) other than the Microsoft Word document provided will not be graded.
- Save and label your Microsoft Word document using your complete legal name and student number (i.e., first name, last name, student number).
- The instructor will physically distribute the assessment questions in-class.

During Assessment

- Respond to the assessment in the specific Microsoft Word document (see above).
- You may use the Excel document provided to perform calculations but must copy & paste the calculations back into the Microsoft Word document.
- Complete the assessment independently without reference to any materials (i.e, no notes, books, aids, internet, or other materials), files, or applications (except the specific Microsoft Word document and Excel) on your laptop - this is a "closed-book" assessment.
- To avoid any uncertainty, you may not use the internet or access any files or applications (except the specific Microsoft Word document and Excel) on your device at anytime during the assessment. Reference to internet includes internet-based technology such as websites, chat functions, messenger apps, "smartwatches", or similar. A breach of this instruction will constitute academic dishonesty and result in associated consequences.
- Cellphones are not permitted and cannot be used during the assessment for any reason (including calculations).
- Do not ask the instructor or proctor to interpret or provide further guidance on the questions. Make any necessary assumptions and be sure to state those assumptions in your response.
- Show all calculations. A response without supporting calculations will not receive full marks.
- Round all numerical calculations (and inputs into calculations) to two decimal points.

Note: The instructor or proctor cannot help resolve any technology issues. There will be no "technical support" available.

If, and only if, during the assessment your device stops operating or malfunctions, you will be asked to complete your assessment using paper and pen. Only the materials submitted at the end of the assesment will be graded (i.e., whatever you can submit such as paper or a mixture of paper and saved Microsoft Word document, if any). Under no circumstance can you "send" your response to the instructor after leaving the assessment (e.g., when you get home, when your laptop is repaired or similar).

End of Assessment

- At the conclusion of the assessment, remain seated quietly and wait for instructions.
- When instructed to do so, upload your Microsoft Word document to Canvas.
- Submit all answers in the Microsoft Word document. Never submit a "link" to your Microsoft Word document (e.g., a link to a SharePoint site or Microsoft OneDrive). Other formats, such as Apple "pages", PDFs, images, or similar are not acceptable. Handwritten responses will not be accepted.
- You will be provided reasonable time to upload your Microsoft Word document, containing your response, to Canvas. Double check that you have uploaded the correct Microsoft Word document.
- You can upload your Microsoft Word document into Canvas only once. If you make a mistake and upload the wrong document, you will not be able to upload a new version. If this occurs, inform your instructor, and then follow the steps below for emailing or saving to USB key
- If you are unable to upload your Microsoft Word document onto Canvas, you will be asked to either email your Microsoft Word document to the instructor or save your Microsoft Word document onto a USB key provided by the instructor.
    - If you are unable to either upload, email, or save your Microsoft Word document to a provided USB key within the reasonable time provided (e.g., by the end of class), you will receive a mark of zero (0).
    - Under no circumstance can you "send" your response to the instructor after leaving the assessment (e.g., when you get home, when your laptop is repaired or similar).
- You will be asked to return the physical assessment questions (which will be returned back to you once the assessment has been graded).
- Once the instructor or proctor has completed the required quality control procedures (e.g., checks, counts), they will make an announcement and confirm the end of the assessment.

To support academic honesty, Canvas automatically processes a student's submitted completed assessment through Turnitin. Any unusual similarities among student responses will be identified for further investigation.

"Extra" Assignments

To ensure all students receive the same assessment opportunities, there are no "extra" work that a student can undertake to receive additional marks or "boost" their grade. Please do not ask your instructor to provide you with "extra" assessment opportunities that are not available to other students. This is unfair.

CALCULATING COURSE GRADE

Expectations

Grades provide students with important feedback on their understanding of the course material, mastery of learning outcomes, and where they need to improve.

The guidelines below help ensure that grading practices are accurate, transparent, and consistent.

Process

A grade on a component (e.g., midterm) may be denoted as a percentage, grade-point, or letter. If a grade is denoted as a percentage or letter, a student can determine their grade point by associating the percentage or letter with the index system discussed below.

For each graded component, a student will be informed of the class grade:

- breakdown (e.g., by range)

- average

At the end of the semester, grades for each component will be multiplied by the weighting of that specific component and summed to determine the total average grade which will be converted into a letter grade. The letter grade corresponds to 9-value index system as outlined below.

In general, earlier components are likely to have lower grades and such grades are generally expected to increase, as students learn and master the material (i.e., as the semester progresses).

This course's index system is as follows:

Grade	Grade Point	Percent Range	Description
A+	9	90-100	Exceptional
A	8	80-89	Excellent
B+	7	75-79	Very Good
B	6	70-74	Good
C+	5	65-69	Competent
C	4	60-64	Fairly Competent
D+	3	55-59	Passing
D	2	50-54	Barely Passing
F	0	(below 50%)	Failing

Cases will be primarily assessed through a competency-based marking system.

Competency Based Marking

At the Schulich School of Business some assessments are competency based. Competency based education focuses on ensuring that every student has the necessary level of underlying technical knowledge *and* the practical skills to apply that knowledge effectively. It is a process that integrates formal technical knowledge with practical application.

A competency-based approach recognizes that knowledge is necessary but *not* sufficient for performing at an exceptional level.

Most **cases** will be evaluated based on a competency-based marking structure, where performance will be categorized as follows:

- Not Addressed (NA) **–** The student did not address and/or attempt the required (e.g., issue).
- Nominally Competent (NC) – The student addressed the required (e.g., issue), but the response was technically incorrect and/or lacked integration of relevant case facts.
- Reaching Competent (RC) **–** The student addressed the required (e.g., issue), but the response contained some technical errors and/or contained insufficient integration of relevant case facts.
- Competent (C) – The student addressed the required (e.g., issue), and the response was technically correct and contained sufficient integration of relevant case facts.
- Competent with Distinction (CD) - The student addressed the required (e.g., issue), and the response was technical correct, contained sufficient integration of relevant case facts, analyzed in-depth, and contained insightful relevant comments.

Each of the above categories will be equated with a specific numerical score. The total score for a case will be denoted as a percentage, grade-point, or letter.

To achieve excellence, it is expected that a student obtains a mix of C's and CD's.

To be successful, students will be required to apply their technical knowledge to case specific facts and provide useful, relevant, and professional responses.

Competency-based marking does not rely on one "right answer". Instead, competencey-based marking relies heavily on judgment and allows for multiple possible responses to a single required (e.g., issue).

Bonus Grades

To ensure a consistent and equitable approach to grading, asking your instructor for discretionary “bonus” marks (or similar) is not appropriate. Please do not put forth such requests to your instructor.

CLASS-BY-CLASS SYLLABUS

Class 1

Sep 5/25

Overview: Class 1

Topics

Framework for Financial Reporting
Accounting Judgements
Case Analysis - Overview & Approach

Class Preparation

Textbook: Chapter 1 & Chapter 2

Format

Live, in person, on campus

Sep 8/25

Overview: Lab 1

Questions

A1-5
A1-13
A2-11
A2-12
A2-21

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB N105 for those that need it.

Class 2

Sep 12/25

Overview: Class 2

Topic

Statements of Income and Comprehensive Income

Class Preparation

Textbook: Chapter 3
Self-Assessment Quiz
Annual Report Questions
Case: Modern Homes (https://schulich.instructure.com/courses/13361/files/1501353?verifier=rLsBSR0H22RaXmwbCCUVDPAqwUICiIHLNGqmo0I0&wrap=1) **(https://schulich.instructure.com/courses/13361/files/1501353/download?verifier=rLsBSR0H22RaXmwbCCUVDPAqwUICiIHLNGqmo0I0&download_frd=1)** (download here)

Format

- Live, in person, on campus **Sep 15/25**

Overview: Lab 2

Questions
A3-5
A3-10
A3-13
TR3-12

Questions found in textbook.

Format
Live: Synchronous – Over Zoom. Room SSB N105 for those that need it.

Class 3

Sep 19/25

Overview: Class 3

Topics
Statements of Financial Position and Changes in Equity; and Disclosure Notes
The Statement of Cash Flow

Class Preparation
Textbook – Chapter 4 & 5
Self-Assessment Quiz
Annual Report Questions

Format
Live, in person, on campus

Sep 22/25

Overview: Lab 3

Questions
A4-22
A5-1
A5-17
A5-29
A5-31

Questions found in textbook.

Format
Live: Synchronous – Over Zoom. Room SSB N105 for those that need it.

Class 4

Sep 26/25

Overview: Class 4

Topic
Revenue Recognition

Class Preparation **Sep 29/25**

Textbook – Chapter 6
Self-Assessment Quiz
Annual Report Questions

Format

Live, in person, on campus

Overview: Lab 4

Questions

A6-1
A6-15
A6-27
TR6-3

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB N105 for those that need it.

Class 5

Oct 3/25

Overview: Class 5

Topic

Financial Assets: Cash and Receivables

Class Preparation

Textbook – Chapter 7
Self-Assessment Quiz
Annual Report Questions
(https://schulich.instructure.com/courses/13361/files/1500233/download)

Format

Live, in person, on campus

Oct 6/25

Overview: Lab 5

Questions

A7-1
A7-5
A7-15
A7-35
TR6-6

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB N105 for those that need it.

Class 6 - Midterm Examination

Oct 10/25

Overview: Class 6

Midterm examination

Refer to Course Syllabus for information about the midterm examination.

Note: There is no class following the completion of the midterm.

Note: No lab associated with this class.

CO-CURRICULAR DAYS - Oct 11 - 17 , 2025 (No Class)

Class 7

Oct 24/25

Overview: Class 7

Topic

Cost-based Inventories and Cost of Sales

Class Preparation

Textbook – Chapter 8
Self-Assessment Quiz
Annual Report Questions
Case - Download Here - Air-Mobile Ltd (https://schulich.instructure.com/courses/13361/files/1500265?verifier=M0p5OLbBfpnLiBYDrcu25ZYH7mzPQOkO5tQBFqJV&wrap=1) (https://schulich.instructure.com/courses/13361/files/1500265/download?verifier=M0p5OLbBfpnLiBYDrcu25ZYH7mzPQOkO5tQBFqJV&download_frd=1)

Format

Live, in person, on campus

Oct 27/25

Overview: Lab 6

Questions

A8-1
A8-10
A8-27
A8-37
TR8-2

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB N105 for those that need it.

Class 8

Oct 31/25

Overview: Class 8

Topic

Long-Lived Assets

Class Preparation

Textbook – Chapter 9
Self-Assessment Quiz
Annual Report Questions

Format

Live, in person, on campus

Nov 3/25

Overview: Lab 7

Questions

A9-15
A9-18
A9-30
A9-37
A9-40

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB N105 for those that need it.

Class 9

Nov 7/25

Overview: Class 9

Nov 10/25

Topic

Depreciation, Amortization, and Impairment

Class Preparation

Textbook – Chapter 10
Self-Assessment Quiz
Annual Report Questions

Format

Live, in person, on campus

Overview: Lab 8

Questions

A10-16
A10-22
A10-31
A10-37
TR10-10

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB N105 for those that need it.

Class 10 - Technical Quiz

Nov 14/25

Overview: Class 10

Technical Quiz

Refer to Course Syllabus for information about the Technical Quiz.

Note: There is no class following the completion of the Technical Quiz.

Nov 17/25

Overview: Lab 9

Questions

Case - Planes Ltd..docx (download here)
(https://schulich.instructure.com/courses/13361/files/1500306?verifier=GEi5SIpjM2JqogRAhasNlLc76fjYNVnFUuj7Ix34&wrap=1)
(https://schulich.instructure.com/courses/13361/files/1500306/download?verifier=GEi5SIpjM2JqogRAhasNlLc76fjYNVnFUuj7Ix34&download_frd=1)

Format

Live: Synchronous – Over Zoom. Room SSB N105 for those that need it.

Class 11

Nov 21/25

Overview: Class 11

Topic

Financial Instruments: Investments in Debt and Equity Securities

Class Preparation

Textbook – Chapter 11
Self-Assessment Quiz
Annual Report Questions

Format

Live, in person, on campus

Nov 24/25

Overview: Lab 10

Questions

Take-up Technical Quiz
A11-1
A11-32

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB N105 for those that need it.

Class 12

Nov 28/25

Overview: Class 12

Topics

Review class
Administrative items (e.g., Course evaluation etc.)

Class Preparation

Case - Theatre Inc.-1.docx (https://schulich.instructure.com/courses/13361/files/1500307?verifier=XhiZgAbwIKRORhwUtFnDJM2kZzGihUVu0DWUEGXJ&wrap=1) (https://schulich.instructure.com/courses/13361/files/1500307/download?verifier=XhiZgAbwIKRORhwUtFnDJM2kZzGihUVu0DWUEGXJ&download_frd=1) (download here)
Other instructor determined content – posted to Canvas

Format

Live, remotely (online) over Zoom. Instructor will post Zoom link.

Note: No lab associated with this class.

Final Exam - Dec 4 - 19

Final Examination

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

The course is a combination of textbook readings, Connect self-reflection questions, annual report questions, classes integrated with problems and cases, and labs. The Course Syllabus outlines the components and associated expectations for each class.

Much of the course is concerned with technical application and interpretation of financial information. Majority of class time involves analysis, not lecturing. Class discussions will be for presentation of the more complex aspects of the technical material and for answering student questions. Class time will not be used to repeat material that is adequately discussed in the textbook. Assesssments (e.g., midterm examination, technical quiz, final examination) will however cover all the assigned material (including materials posted to Canvas) and will not be restricted to the material explicitly discussed during class.

Class coverage may be ahead of, or behind, topics noted in the Course Syllabus, depending upon the particular difficulties experienced by the class. If assigned materials are not covered during class due to time constraints, students are still responsible for preparing and understanding the material. Regardless of class coverage, the student is responsible for all material noted in the course outline plus class discussions.

A minimum of 8 to 10 hours of work outside of class is required per week. To obtain the maximum benefit from classes, reading the assigned chapters and associated material beforehand is essential. Failure to do so may result in a student's inability to fully understand the lecture and participate in related class activities (e.g, group discussion) causing the student to potentially feel "lost" or "overwhelmed". This course is very technical and pre-reading is essential to understanding the content in the lecture. Advanced preparation is necessary in order to maximize the usefulness of classroom time.

Students that perform better in this course consistently attend class and lab, fully prepared to actively participate in discussions.

Organization of the Course

The following is an overview of how students are expected to approach the course. For complete details, refer to the Assignments and Classes section of the Course Syllabus.

Step 1 – Read Textbook Chapter(s)

For most classes, one or two textbook chapters are assigned as readings. Due to the complex material covered in class, it is essential that the assigned readings be completed prior to the start of that week's class.

Step 2 – Complete Connect Self-Reflection Questions

For most classes, there are assigned Connect self-reflection questions that must be completed prior to the start of that week's class.

Access these self-reflection questions by clicking into the relevant assignment module in Canvas or by accessing them directly in Connect.

Connect self-reflection questions are meant to provide you with an opportunity to self-assess your understanding of the textbook material. This self-reflection may also indicate areas where you need to

go back and review content from the chapter. For areas that are unclear, you can ask questions in the class and/or the lab.

Step 3 – Complete Annual Report Questions

For most classes, annual report questions are assigned and posted in Canvas. Students must complete and submit the assigned annual report questions through the "Assignments" function in Canvas prior to the start of that week's class. These questions will be discussed during the class.

You will need to go the Maple Leaf Foods website or sedarplus.ca to download the 2023 annual report for Maple Leaf Foods.

Step 4 - Attend Class

Attend the live, in-person, class on campus. Class are not recorded. If you miss a class, please obtain notes from a classmate.

PowerPoint slides may be posted on Canvas for each class. If posted, the PowerPoint slides are just teaching points not full descriptions of the content. These PowerPoint slides need to be supplemented with the readings from the textbook to gain an understanding of the accounting issues.

Annual report questions will be discussed during the class, so have a copy of your answers to these questions easily accessible.

For some lectures there may be an assigned video to watch on Canvas under the Echo 360 link that goes through some of the terminology related to the class topic. It is highly recommended that any videos, if posted, be reviewed.

Step 5 - Attend Lab

Labs are not recorded. If you miss a lab, please obtain notes from a classmate.

Lab questions listed in the Course Syllabus. Students must complete and submit (upload) the assigned lab questions through the "Assignments" function in Canvas prior to the start of that week's lab. These questions will be discussed during lab.

Labs are an essential component of the course. In class, we will discuss the accounting concepts. The labs will be used to apply those concepts from class to technical questions. Your lab instructors will walk through the logic and how to approach these technical problems. The content will be discussed in class on the accounting issues, then the labs will be used to work through practical problems based on class content. The technical quiz is based on material similar to the technical problems discussed in the labs.

Due to copyright restrictions we are not allowed to post the solutions to the lab questions. Labs are not recorded or live-streamed.

You must have your camera on *throughout* the entire lab. If your home environment is not conducive to having the camera on (e.g., noise, privacy), please go to the allocated classroom at Schulich (N105 SSB) which will provide a suitable environment to have the camera on.

Step 6 - Practice

A student's success in the course is highly dependent on their understanding of both theoretical and applied aspects of accounting. Canvas Modules include a series of additional (optional) practice questions for students.

Scheduling Conflicts

Students are expected to attend all classes and labs. Students should coordinate their schedules to avoid planning known commitments (e.g., work, presentations, extra-curricular events, vacations, trips,

ceremonies, family obligations, or similar) that conflict or overlap with scheduled class or lab time. To ensure consistency, the instructor cannot accommodate individual student requests regarding such scheduling conflicts. Students must resolve any such scheduling conflicts.

Students may attend only the class and lab in which they are enrolled.

Email Etiquette

All communication must be professional and respectful. In the age of social media, many students approach emailing similar to texting and other forms of digital communication, where the crucial conventions are brevity and informality. But most instructors consider emails closer to letters than to text messages. This style of writing calls for more formality, more thoroughness and more faithful adherence to the formal conventions of writing -- that is, salutations, spelling, punctuation, capitalization and most importantly tone.

No Recording of Classes or Labs

Students are not permitted to record any portion of a class or lab, audio or video, without the prior written permission of the instructor.

Copyright Notice

Course materials, including power point presentations, outlines, questions and solutions, assignments, and similar materials, are protected by copyright. The instructor and publisher are the exclusive owners of copyright in those materials they create. You may take notes and make copies of course materials for your own educational use. You may not record lectures, reproduce (or allow others to reproduce), post or distribute lecture notes, wiki material, and other course materials publicly and/or for commercial purposes without the prior written consent of the instructor.

Academic Integrity and Artificial Intelligence Tools

At York, the Senate Academic Conduct Policy prohibits the undocumented or unreferenced use of GenAI by students, while further allowing instructors to restrict the use of GenAI tools. Note that by default, any documented use of GenAI is not a breach of academic integrity unless explicitly prohibited by the instructor."

In this course, all assessments (including midterm examination, technical quiz, and final examination) and other submitted work (including responses to annual report questions and lab questions) must reflect **your own independent work**.

The use of **artificial intelligence (AI) programs, applications, or tools** (for example, ChatGPT or similar systems) is **strictly prohibited** in any form on assessments and submitted work.

This means you may not use AI to:

- Generate answers, explanations, responses, or solutions
- Draft or rewrite your work
- Check, edit, or "improve" your writing or responses
- Provide hints, outlines, or structure for your work

Simply put: **Do not use AI tools for assessments or submitted work in this course.**

Why? Because assessments are designed to measure your own understanding, skills, and effort. In this course, using AI undermines that purpose and constitutes **academic misconduct**.

Class Participation (contribution)

Students are strongly encouraged to participate in class discussions. Be prepared to engage in discussions and to put forth your position, questions, and opinions.

You will be given opportunities to think your way through questions posed to you – take this opportunity to practice your analytical skills. The class will be a rich learning environment if you are willing to take the risk to agree or disagree, to challenge thoughtfully while listening carefully to the contributions of others.

This course is not a memorization course - you will be pushed to use your analytical and critical thinking skills; therefore, taking the opportunity to practice your critical thinking and analytical skills will be extremely beneficial as students prepare for their assessments.

The instructor may cold call on an individual or groups of students (depending on class size) to present a problem, assigned case, or answer specific questions during class.

GENERAL SCHULICH ACADEMIC POLICIES

Grading

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

Academic Honesty

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

Accommodations

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

Visiting Campus

All York community members share in the responsibility of keeping others safe on campuses, and to uphold professional and respectful interactions with one another. In this class, as elsewhere on campus, students must comply with all University health and safety regulations or protocols, including the following:

- Do not attend in-person activities at any of York University's campuses/locations when you are feeling unwell. Please complete a self-assessment on YU Screen to receive support from a member of the University's case and contact management team.
- Wear a high quality, snugly fitting mask that completely covers the mouth, nose, and chin in all indoor spaces on campus
- Do not eat or drink in instructional spaces, including research and shared spaces (e.g., Libraries), unless for urgent health reasons.

More Information about COVID-19 health and safety measures can be found on the **Better Together (https://www.yorku.ca/bettertogether/)** website.

Encouraging a Community of Care

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

Student Rights and Responsibilities

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

The Schulich School of Business strongly supports and adheres to the **Code of Student Rights and Responsibilities (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)** . All students have rights and responsibilities as outlined in this document and are expected to uphold the identified values for the benefit of the entire community.

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

Take time to fully review the Code of Student Rights and Responsibilities:
https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/ (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)

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

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

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

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Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Abu Rahaman, Accounting Area Representative on the BBA Committee
Date: November 3, 2025
Re: ACTG 3120 3.0 - Add a Blended Format of Course Delivery

Motion:

Faculty Council approves the proposal to add a blended format of course delivery for the following course in the BBA program: ACTG 3120 3.0, Intermediate Financial Accounting II.

Rationale:

In Fall 2025 senior year accounting students' requested that the course delivery for this course be changed to blended, and in particular to deliver the technical component of the course online. In response, and with ADA permission, this course was delivered, with permission, in a blended format, to assess the impact. At the end of the semester, we obtained feedback from students and instructors, and all was overwhelmingly positive, as evidenced by the increase in class attendance that is now over 95% and there also was a consistency in course grades.

The blended teaching format facilitates course content being taught online as well as in the in-person depending upon the most appropriate mode of the content. Learning outcomes for this course have not been altered. What we have already learned is that some types of learning are better accommodated inperson and others online: For example, interactive learning that can include introduction of new material and case study discussions, appear to be better delivered in person; however, the technical accounting applications appear to be better absorbed by students through online sessions.

In conclusion, taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further evaluate how different types of content, formats, and techniques encourage students learning and engagement. Our request also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

Schulich
School of Business
York University

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   Schulich BBA Program

2. Responsible Unit:
   ACTG

3. Subject Code (Rubric) and Course Number:
   ACTG 3120

4. Credit Value:
   3.00

5. Long Course Title:
   Intermediate Financial Accounting II

6. Short Course Title:
   Intermediate Financial Accounting II

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

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

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

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

   In Fall 2025 senior year accounting students' requested that the course delivery for this course be changed to blended, and in particular to deliver the technical component of the course online. In response, and with ADA permission, this course was delivered, with permission, in a blended format, to assess the impact. At the end of the semester, we obtained feedback from students and instructors, and all was overwhelmingly positive, as evidenced by the increase in class attendance that is now over 95% and there also was a consistency in course grades.

   The blended teaching format facilitates course content being taught online as well as in the in-person depending upon the most appropriate mode of the content. Learning outcomes for this course have not been altered. What we have already learned is that some types of learning are better accommodated inperson and others online: For example, interactive learning that can include introduction of new material and case study discussions, appear to be better delivered in person; however, the technical accounting applications appear to be better absorbed by students through online sessions.

   In conclusion, taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further evaluate how different types of content, formats, and techniques encourage students learning and engagement. Our request also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

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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):
Mode of delivery: in person	Mode of delivery: in person, blended Changes to the course syllabus are reflected in the attached updated syllabus. Course title, description, and learning outcomes remain identical to the existing course information

11. Enrolment Notes:

n/a

12. Consultation:

n/a

Originator:

Abu Rahaman Signature	November 3, 2025 Date
Abu Rahaman Name	ACTG Area or Specialization

Schulich
School of Business
York University

Approvals:

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

Linda Thorne	Nov 3, 2025
Signature	Date
Linda Thorne	ACTG
Name	Area or Specialization

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA/iBBA Programs
Name of Program Director	Program

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

last updated: Oct 21 10:10am EDT.

Schulich School of Business

ACTG3120 F2025 CREDITS: 3.00

ACTG 3120 A - INTERMEDIATE FINANCIAL ACCOUNTING II

TUE 08:30-11:20 SSB W133

Lab Schedule

WED 17:30 - 18:50 ONLINE

COURSE DIRECTOR

Marisa Morriello

mmorriello@schulich.yorku.ca

416.736.2100 Ext. 77928

S344C SSB

ADMIN

Roberta Parris-Toney

parris@schulich.yorku.ca

S344K SSB

Labs

In addition to classes, students will attend a series of labs. Each lab is scheduled for 90 minutes. Labs are conducted virtually, in a live and synchronous manner, over Zoom. Labs are never recorded - therefore scheduled attendance is necessary.

Labs are an essential part of the course. A student's success in the course is highly dependent on their understanding of both theoretical and applied aspects of accounting. Lab questions are required to be completed for each lab as outlined in the course syllabus. Labs are meant to provide students the opportunity to practice and apply their technical skills – a fundamental skill required for success in the course. There is a specific lab assigned for each section. You need to attend the lab related to your section. You cannot attend a different lab.

To promote an engaging environment, students are expected to have their camera on throughout the entire lab. If a student's home environment is not conducive to having the camera on (e.g., noise, privacy), the student should go to the allocated classroom at Schulich (N105 SSB) which will provide the student a suitable environment to have their camera on.

The lab for this course will be conducted as virtual, synchronous meets. For more details, please refer to Canvas

MARISA MORRIELLO - INSTRUCTOR

Marisa Morriello is a sessional instructor at the Schulich School of Business. Marisa is currently teaching courses in financial accounting and case writing at the undergraduate and graduate levels.

BRIEF DESCRIPTION

This is an extension of SB/ACTG 3110 3.00, but with a primary focus on the valuation and presentation of liabilities

and owners' equity. Major topics include current, long-term and contingent liabilities; leases; pensions; corporate income tax allocation; capital transactions, earnings per share and analysis of financial statements under differing accounting policies. The criteria by which both preparers and users make decisions are emphasized. Note: Not available to exchange students visiting Schulich. Open to Schulich undergraduate students with minimum Year 3 academic standing. Prerequisite: SB/ACTG 3110 3.00.

COURSE LEARNING OUTCOMES

Overview

This course deals with accounting and reporting issues that comprise the bulk of the technical sections of the CPA Canada Handbook. In most of the topics discussed, there are few, if any, accounting policy choices available for those reporting enterprises that are constrained by GAAP. For many accounting policies there will not be an alternative to discuss. Despite the apparent limitations on *accounting policy* choices for GAAP-constrained enterprises, there still remains a wide range of *accounting estimates* that are subject to management's judgments, and that can significantly affect the reported financial results. Of course, companies that are not constrained by GAAP have a greater choice of reporting options.

Despite the accounting policy restrictions that are imposed by the recommendations in the *CPA Canada Handbook*, it is still necessary to make choices from amongst alternative accounting policies and to derive estimates that have a significant impact on accounting measurements.

In this course, it is impossible to avoid dealing with the numerical outcomes of accounting choices; a verbal analysis of issues and choices will seldom be sufficient. Students must be prepared to discuss the numerical results of alternative accounting policies and estimates.

The key differences between ACTG 3110 and ACTG 3120 are:

- Many accounting issues do not have an accounting alternative but include many estimates e.g. leases; therefore, the facts will dictate the appropriate accounting policy;
- The impact on the primary user and objective will not always be to select the accounting alternative that is best for their objectives. Often it is explaining there is no alternative based on the facts and explaining the impact on the user and objective e.g. if capital lease will have negative impact on debt to equity ratio;
- Most accounting issues involve calculations and are very technical.

In summary, this course will endeavor to give students the knowledge they need to:

1. select accounting policies and measurements that are appropriate to the specific business and stakeholder context of the reporting enterprise;
2. understand the technical issues involved in measuring the liability and equity amounts on the balance sheet (and their corresponding impacts on the income statement, statement of comprehensive income and cash flow statement), and understand what the amounts do and do not measure;
3. interpret, 'dissect' and recast financial statements in order to see through attempts by preparers to lead users toward certain conclusions; and
4. understand the differences in the accounting between the international accounting standards (Part I of CPA Canada Handbook) and the accounting standards for private enterprises (Part II of CPA Canada Handbook).

The course (and the assessments) will cover technical problem material, articles and cases. Both short mini-cases and larger-scale analytical cases will be used. Assessments will cover all the assigned material and will not be restricted to the material explicitly discussed in class.

The course is a continuation of ACTG 3110 and topics learned in that course will be incorporated in cases and material in ACTG 3120.

Classes

The course will consist of twelve (12) separate 3-hour classes. Classes are live, in-person, on campus. Classes are not recorded or "streamed" live virtually.

To obtain the maximum benefit from classes, reading the assigned chapter and associated material beforehand is essential. Failure to do so may result in a student's inability to fully understand the lecture and participate in related class activities (e.g, group discussion) causing the student to potentially feel "lost" or "overwhelmed". Therefore, advance preparation is essential.

Labs

In addition to classes, students will attend a series of labs. Each lab is scheduled for 90 minutes. Labs are live, sychronous over Zoom.

Labs are an essential part of the course. A student's success in the course is highly dependent on their understanding of both theoretical and applied aspects of accounting. Lab questions are required to be completed for each lab as outlined in the course syllabus. Labs are meant to provide students the opportunity to practice and apply their technical skills – a fundamental skill required for success in the course. There is a specific lab assigned for each section. You need to attend the lab related to your section. You cannot attend a different lab.

COURSE MATERIAL

The following course materials are required:

Textbook

Intermediate Accounting Volume 2, Ninth Edition Update with Connect PPK© 2025, McGraw-Hill Ryerson

by Thomas H. Beechy, Joan E. Conrod, Elizabeth Farrell, Ingrid McLeod-Dick, Marisa Morriello, Naomi Paisley, Romi-Lee Sevel, Kayla Tomulka

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The textbook is available in both hard-copy and electronic format; however, in either case, you must have Connect access for this course.

You must purchase the **ninth edition** (**2025**) of the text since it includes the most up-to-date international financial reporting standards and the accounting standards for private enterprises. Do NOT purchase previous editions as they are out of date.

The textbook is available for purchase from the York University bookstore.

Purchase Options

Option #1 – Hard-copy textbook with Connect - Intermediate Accounting Volume by Beechy 9th edition (Volume 2) with Connect - (**$159.95**)

Option #2 – Electronic textbook with Connect (includes the electronic version of the textbook and Connect) – Intermediate Accounting (Volume 2) by Beechy 9th edition

To purchase Option #2:

1. Go to the bookstore link - **https://campus.bookstore.yorku.ca/adoption-search (https://urldefense.com/v3/__https:/campus.bookstore.yorku.ca/adoption-search__;!!BlJO!m5hE8WahdJXi7B3acJ0K3b0gwqdNsApVdfTsZhEUnRt2CTUC0JhvymgmXWwbYKIaKM0WoRXtXttoL1ao6QDP6g$)** your section of the course

2. Locate your course code from the course list. Once select your course, click “Begin Shopping”.
3. You will be brought to a screen that lists the CONNECT option for your course.
4. Click “Add to Cart” to add the CONNECT only package to your cart.
5. Next, click “View Cart & Checkout” and proceed to checkout.

Once you have completed your purchase, you will receive an email with a 10-digit registration code to input into Canvas (i.e., once prompted with a “Enter your registration code” box). It is important you retain your 10-digit registration code.

If you need help registering, access the following resources:

1. Guide - “Introduction to Intermediate Accounting: How to register for CONNECT in Canvas” document in Canvas posted under “Announcements”.
2. Video - Video walk-through on how to register for CONNECT through Canvas, please go: **https://www.mheducation.com/highered/support/connect/first-day-of-class/canvas.htmlLinks to an external site.Links to an external site. (https://urldefense.com/v3/__https:/www.mheducation.com/highered/support/connect/first-day-of-class/canvas.html__;!!BlJO!mXHs2OBe8vsPQTgpRmHIgVWoXFORv9uF4DtQ_3PBn8WvUegRHncCHtlC-oUqSX4DqId25wCdgYcJSFyIGbyTATnZzVFC2R5-vpw$)**
3. Webpage – McGraw Hill Connect also has a support page which includes helpful videos on registration as well as live technical support: **https://mhedu.force.com/CXG/s/Links to an external site.Links to an external site. (https://urldefense.com/v3/__https:/mhedu.force.com/CXG/s/__;!!BlJO!mXHs2OBe8vsPQTgpRmHIgVWoXFORv9uF4DtQ_3PBn8WvUegRHncCHtlC-oUqSX4DqId25wCdgYcJSFyIGbyTATnZzVFCOw23Ems$)**

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Annual Report

2023 Maple Leaf Foods Annual Report (available on internet for access and download).

Technology

Students are expected to have access to the following technology:

1. Laptop - A laptop is expected for in-person assessments. No other devices such as a cell phone will be allowed. The laptop should be capable of running various applications (including Microsoft Word and Excel, Canvas, Zoom and an internet browser that can access the internet). It is the responsibility of the student to bring their device, including all accessories (i.e. power cord, external calculator) to all in-person classroom assessments. Students are responsible for ensuring their device is operational and has a full charged battery for the duration of the assessment.

2. Microsoft Word & Excel - Should you require Microsoft products, all registered York student have access to FREE Microsoft Office software available at the following site: https://www.yorku.ca/uit/student-services/software/

3. Calculator - A standard financial/scientific calculator, which does not store data, that can perform present and future value calculations.

4. Internet - Students are expected and assumed to have reliable high-speed internet access.

Canvas & Additional Readings

Canvas will be used as a central bulletin board on which the instructor can make announcements and post relevant course materials. You are expected to check Canvas at least twice each week. Any announcements that need to be made to the entire class will be posted to Canvas rather than sent in a blanket email. Any additional readings for each lecture will be posted electronically on Canvas. If you have any difficulty accessing Canvas, please

contact askit@yorku.ca

Course Assessments

This course has certain assessments (i.e., technical quiz, midterm, final examination) that are completed live and in-person using a laptop.

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Connect Self-Assessments 5%			
Self-Assessment Quiz - Chapter 12		0.5%	Tue Sep 16, 2025 at 08:30am EDT
Self-Assessment Quiz - Chapter 13		0.5%	Tue Sep 16, 2025 at 08:30am EDT
Self-Assessment Quiz - Chapter 14		0.5%	Tue Sep 16, 2025 at 08:30am EDT
Self-Assessment Quiz - Chapter 15		0.5%	Tue Sep 23, 2025 at 08:30am EDT
Self-Assessment Quiz - Chapter 16		0.5%	Tue Sep 30, 2025 at 08:30am EDT
Self-Assessment Quiz - Chapter 17		0.5%	Tue Oct 7, 2025 at 08:30am EDT
Self-Assessment Quiz - Chapter 18		0.5%	Tue Oct 28, 2025 at 08:30am EDT
Self-Assessment Quiz - Chapter 19		0.5%	Tue Nov 4, 2025 at 08:30am EST
Self-Assessment Quiz - Chapter 20		0.5%	Tue Nov 11, 2025 at 08:30am EST
Self-Assessment Quiz - Chapter 21		0.5%	Tue Nov 11, 2025 at 08:30am EST
Annual Report Questions 5%			
Annual Report Questions 1 - Chapter 12		0.5%	Tue Sep 16, 2025 at 08:30am EDT
Annual Report Questions 2 - Chapter 13		0.5%	Tue Sep 16, 2025 at 08:30am EDT
Annual Report Questions 3 - Chapter 14		0.5%	Tue Sep 16, 2025 at 08:30am EDT
Annual Report Questions 4 - Chapter 15		0.5%	Tue Sep 23, 2025 at 08:30am EDT
Annual Report Questions 5 - Chapter 16		0.5%	Tue Sep 30, 2025 at 08:30am EDT

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Annual Report Questions 6 - Chapter 17		0.5%	Tue Oct 7, 2025 at 08:30am EDT
Annual Report Questions 7 - Chapter 18		0.5%	Tue Oct 28, 2025 at 08:30am EDT
Annual Report Questions 8 - Chapter 19		0.5%	Tue Nov 4, 2025 at 08:30am EST
Annual Report Questions 9 - Chapter 20		0.5%	Tue Nov 11, 2025 at 08:30am EST
Annual Report Questions 10 - Chapter 21		0.5%	Tue Nov 11, 2025 at 08:30am EST
Lab Questions 5%			
Lab 1		0.5%	Wed Sep 10, 2025 at 05:30pm EDT
Lab 2		0.5%	Wed Sep 17, 2025 at 05:30pm EDT
Lab 3		0.5%	Wed Sep 24, 2025 at 05:30pm EDT
Lab 4		0.5%	Wed Oct 1, 2025 at 05:30pm EDT
Lab 5		0.5%	Wed Oct 8, 2025 at 05:30pm EDT
Lab 6		0.5%	Wed Oct 29, 2025 at 05:30pm EDT
Lab 7		0.5%	Wed Nov 5, 2025 at 05:30pm EST
Lab 8		0.5%	Wed Nov 12, 2025 at 05:30pm EST
Lab 9		0.5%	Wed Nov 19, 2025 at 05:30pm EST
Lab 10		0.5%	Wed Nov 26, 2025 at 05:30pm EST
Midterm Examination 25%			
Midterm Examination		25%	Tue Oct 21, 2025 at 10:25am EDT
Technical Quiz 25%			

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Technical Quiz		25%	Tue Nov 18, 2025 at 10:10am EST
Final Examination 30%			
Final Exam		30%	
Academic Honesty Statement 0%			
Academic Honesty Statement		0%	Tue Sep 9, 2025 at 08:30am EDT
In-Lab Engagement 5% 2 lowest will be dropped			
In-Lab Engagement 1		0.63%	Wed Sep 10, 2025 at 07:00pm EDT
In-Lab Engagement 2		0.63%	Wed Sep 17, 2025 at 07:00pm EDT
In-Lab Engagement 3		0.63%	Wed Sep 24, 2025 at 07:00pm EDT
In-Lab Engagement 4		0.63%	Wed Oct 1, 2025 at 07:00pm EDT
In-Lab Engagement 5		0.63%	Wed Oct 8, 2025 at 07:00pm EDT
In-Lab Engagement 6		0.63%	Wed Oct 29, 2025 at 07:00pm EDT
In-Lab Engagement 7		0.63%	Wed Nov 5, 2025 at 07:00pm EST
In-Lab Engagement 8		0.63%	Wed Nov 12, 2025 at 07:00pm EST
In-Lab Engagement 9		0.63%	Wed Nov 19, 2025 at 07:00pm EST
In-Lab Engagement 10		0.63%	Wed Nov 26, 2025 at 07:00pm EST
Additional Practice (Optional) 0%			
Practice - Chapter 12 Questions		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice - Chapter 13 Questions		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice - Chapter 14 Questions		0%	Wed Dec 31, 2025 at 11:59pm EST

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Practice - Chapter 15 Questions		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice - Chapter 16 Questions		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice - Chapter 17 Questions		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice - Chapter 18 Questions		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice - Chapter 19 Questions		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice - Chapter 20 Questions		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice - Chapter 21 Questions		0%	Wed Dec 31, 2025 at 11:59pm EST
Practice - Chapter 22 Questions		0%	Wed Dec 31, 2025 at 11:59pm EST
Course Evaluation Bonus 1%			
Course Evaluation Bonus		1%	

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Self-Assessment Quiz - Chapter 12

Due Date: Tue Sep 16, 2025 at 08:30am EDT

Self-Assessment Quiz - Chapter 13

Due Date: Tue Sep 16, 2025 at 08:30am EDT

Self-Assessment Quiz - Chapter 14

Due Date: Tue Sep 16, 2025 at 08:30am EDT

Self-Assessment Quiz - Chapter 15

Due Date: Tue Sep 23, 2025 at 08:30am EDT

Self-Assessment Quiz - Chapter 16

Due Date: Tue Sep 30, 2025 at 08:30am EDT

Self-Assessment Quiz - Chapter 17

Due Date: Tue Oct 7, 2025 at 08:30am EDT

Self-Assessment Quiz - Chapter 18

Due Date: Tue Oct 28, 2025 at 08:30am EDT

Self-Assessment Quiz - Chapter 19

Due Date: Tue Nov 4, 2025 at 08:30am EST

Self-Assessment Quiz - Chapter 20

Due Date: Tue Nov 11, 2025 at 08:30am EST

Self-Assessment Quiz - Chapter 21

Due Date: Tue Nov 11, 2025 at 08:30am EST

Annual Report Questions 1 - Chapter 12

Due Date: Tue Sep 16, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. What are the types of provisions?
2. What is the accounting for lawsuits?

Annual Report Questions 2 - Chapter 13

Due Date: Tue Sep 16, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. What categories of financial instruments are used for liabilities?
2. What is the accounting for borrowing costs?
3. What is included in long-term debt?

Annual Report Questions 3 - Chapter 14

Due Date: Tue Sep 16, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. What type of shares has Maple Leaf issued and authorized?
2. What type of adjustments were made to retained earnings?
3. What additional items are included in shareholders' equity?

Annual Report Questions 4 - Chapter 15

Due Date: Tue Sep 23, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. What method of accounting is used for stock-based compensation?
2. What is the accounting for cash flow hedges and fair value hedges?
3. What key assumptions are used for employee share based compensation?

Annual Report Questions 5 - Chapter 16

Due Date: Tue Sep 30, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. How are deferred taxes classified on the Statement of Financial Position?
2. What method is used to determine income taxes? What rate is used to measure future income tax assets and liabilities?
3. What is the largest example of a deferred tax asset, deferred tax liability?

Annual Report Questions 6 - Chapter 17

Due Date: Tue Oct 7, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. When are deferred tax assets recognized for tax losses?
2. What is the largest example of a deferred tax asset?

Annual Report Questions 7 - Chapter 18

Due Date: Tue Oct 28, 2025 at 08:30am EDT

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. Where are leases recognized on the Statement of Financial Position?
2. What type of assets are included in right of use assets and what is the accounting?
3. What is the accounting for lease liabilities?
4. What payments related to leases were recognized in net income?

Annual Report Questions 8 - Chapter 19

Due Date: Tue Nov 4, 2025 at 08:30am EST

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. Where are pensions shown on the Statement of Net Earnings, the Statement of Financial Position and the Statement of Comprehensive Income?
2. What is the type of pension plan (s)?
3. What is the accounting for defined contribution plans?
4. What are the components of the pension benefit expense?
5. What are the reasons for changes in benefit obligation and plan assets?
6. What are some key assumptions used in determining pensions?

Annual Report Questions 9 - Chapter 20

Due Date: Tue Nov 11, 2025 at 08:30am EST

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. What types of EPS calculations are included on the Consolidated Statements of Net Earnings?
2. How are basic and diluted EPS determined?
3. What type of items are included in diluted EPS that are not included in basic EPS?
4. Why are some items not included in diluted EPS?

Annual Report Questions 10 - Chapter 21

Due Date: Tue Nov 11, 2025 at 08:30am EST

Answer the following questions using information found in the 2023 Annual Consolidated Financial Statements of Maple Leaf Foods Inc. For each answer, specifically state the document page or note number where you found the information.

1. What information is provided on changes in accounting policies during the year?
2. What information is provided on future changes in accounting policy changes?

Lab 1

Due Date: Wed Sep 10, 2025 at 05:30pm EDT

Questions

- A12-9
- A12-12
- A12-20
- A12-23
- A12-31

Questions found in textbook.

Lab 2

Due Date: Wed Sep 17, 2025 at 05:30pm EDT

Questions

- A13-5
- A13-20
- A13-39
- A14-7
- A14-14 (Case A-C)
- Live: Synchronous – Over Zoom. Room SSB W133 for those that need it.

Lab 3

Due Date: Wed Sep 24, 2025 at 05:30pm EDT

Questions

- A15-7
- A15-9

- A15-17
- A15-29
- A15-41

Questions found in textbook.

Lab 4

Due Date: Wed Oct 1, 2025 at 05:30pm EDT

Questions

- A16-2
- A16-11
- A16-21
- A16-33

Questions found in textbook.

Lab 5

Due Date: Wed Oct 8, 2025 at 05:30pm EDT

Questions

- A17-4
- A17-8
- A17-13
- A17-35

Questions found in textbook.

Lab 6

Due Date: Wed Oct 29, 2025 at 05:30pm EDT

Questions

- A18-1
- A18-3
- A18-5
- A18-10
- A18-26

Questions founds in textbook.

Lab 7

Due Date: Wed Nov 5, 2025 at 05:30pm EST

Questions

- A19-2
- A19-7
- A19-21
- A19-40

Questions found in textbook.

Lab 8

Due Date: Wed Nov 12, 2025 at 05:30pm EST

Questions

- A20-10
- A20-11 (basic only)
- A21-3
- A21-33

Questions found in textbook.

Lab 9

Due Date: Wed Nov 19, 2025 at 05:30pm EST

Questions

DAIS Questions Part I - <Click to Download> **IT and DAIS Questions for Lab 9.docx (https://schulich.instructure.com/courses/13462/files/1509538?verifier=uxxVJsvL1opW7cPsN9VKI5KbSwaABxyBLaoBydF9&wrap=1) (https://schulich.instructure.com/courses/13462/files/1509538/download?verifier=uxxVJsvL1opW7cPsN9VKI5KbSwaABxyBLaoBydF9&download_frd=1)**

Lab 10

Due Date: Wed Nov 26, 2025 at 05:30pm EST

Questions

- DAIS Questions Part II - <Click here to Download> **IT and DAIS Questions for Lab 10.docx (https://schulich.instructure.com/courses/13462/files/1509541?verifier=w9D2obL6HBGGQIbwdzcSLC1wlvfBh1uT5Ao4RxvV&wrap=1) (https://**

schulich.instructure.com/courses/13462/files/1509541/download?verifier=w9D2obL6HBGGQlbwdzcSLC1wlvfBh1uT5Ao4RxvV&download_frd=1)

- Take-up technical quiz

Midterm Examination

Due Date: Tue Oct 21, 2025 at 10:10am EDT

Word Response File

Excel File

Technical Quiz

Due Date: Tue Nov 18, 2025 at 10:10am EST

Details available Tue Nov 18, 2025 at 08:30am EST

Final Exam

Word File:

Excel File:

Academic Honesty Statement

Due Date: Tue Sep 9, 2025 at 08:30am EDT

Please sign and upload the **(https://schulich.instructure.com/courses/9582/files/990909?wrap=1) Student Honor Statement - Intermediate Financial Accounting-1 (1).docx (https://schulich.instructure.com/courses/13462/files/1509548?verifier=A9c8DFX0M3ZC0NMICEZaqJqhC331rrAkSOmqmzQz&wrap=1) (https://schulich.instructure.com/courses/13462/files/1509548/download?verifier=A9c8DFX0M3ZC0NMICEZaqJqhC331rrAkSOmqmzQz&download_frd=1) (https://schulich.instructure.com/courses/9582/files/990909?wrap=1)**

(https://schulich.instructure.com/courses/9582/files/990909?wrap=1)

This is a **required submission** and your attestation is **mandatory** for your assessments (e.g., Quizzes, Midterm and Final Examination) to be graded.

We understand university is challenging and you face many pressures, including those compounded by our current environment. Nonetheless, we would like stress that at Schulich there will be **zero tolerance** for cheating/plagiarism. For example, breaching academic honesty is as simple as sharing your answer (or part of an answer) to an assessment with a classmate, collaborating on

a timed assessment (e.g., messaging answers or discussing questions over an app or phone), copying and pasting from another resource (e.g., internet) or your own work that you have prepared in advance.

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.

In-Lab Engagement 1

Due Date: Wed Sep 10, 2025 at 07:00pm EDT

In-Lab Engagement 2

Due Date: Wed Sep 17, 2025 at 07:00pm EDT

In-Lab Engagement 3

Due Date: Wed Sep 24, 2025 at 07:00pm EDT

In-Lab Engagement 4

Due Date: Wed Oct 1, 2025 at 07:00pm EDT

In-Lab Engagement 5

Due Date: Wed Oct 8, 2025 at 07:00pm EDT

In-Lab Engagement 6

Due Date: Wed Oct 29, 2025 at 07:00pm EDT

In-Lab Engagement 7

Due Date: Wed Nov 5, 2025 at 07:00pm EST

In-Lab Engagement 8

Due Date: Wed Nov 12, 2025 at 07:00pm EST

In-Lab Engagement 9

Due Date: Wed Nov 19, 2025 at 07:00pm EST

In-Lab Engagement 10

Due Date: Wed Nov 26, 2025 at 07:00pm EST

Practice - Chapter 12 Questions

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Practice - Chapter 13 Questions

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Practice - Chapter 14 Questions

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Practice - Chapter 15 Questions

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Practice - Chapter 16 Questions

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Practice - Chapter 17 Questions

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Practice - Chapter 18 Questions

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Practice - Chapter 19 Questions

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Practice - Chapter 20 Questions

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Practice - Chapter 21 Questions

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Practice - Chapter 22 Questions

Due Date: Wed Dec 31, 2025 at 11:59pm EST

Course Evaluation Bonus

WRITTEN ASSIGNMENTS: EVALUATION

Before Class Assessments

All before class assessments must be completed individually and independently.

Connect Self-Reflections

Students will complete a series of Connect Self-Assessment questions in Connect. Students must access these questions through Canvas and complete them at their own pace anytime before the due date.

Connect Self-Reflection questions are graded but students will have three (3) attempts, to achieve the correct answer, for each question prior to final submission.

Students who do not complete an assessment by the due date, for whatever reason (including technology issues), receive a grade of zero - meaning they did not participate or engage in the learning process. Since this assessment is meant to encourage participation in the learning process in a *timely* fashion, there are no "make-up" assessments or extensions. Students either complete the assessment or not. Late submissions are not accepted.

To ensure timely completion, students are encouraged to plan their time accordingly. Do not wait until the last minute to complete each assigned assessment because undoubtably issues may arise (e.g., commitments, technology issues).

Annual Report Questions

For most classes, annual report questions are assigned and posted in Canvas. Students must complete and submit (upload) the assigned annual report questions through the "Assignments" function in Canvas prior to the start of that week's class. These questions will be discussed during the class.

You will need to go the Maple Leaf Foods website or sedarplus.ca to download the 2023 annual report for Maple Leaf Foods.

Annual report questions are graded for completion (i.e. a reasonable attempt to fully complete the questions with good faith effort) and not technical accuracy of the responses. Students who fully complete the assigned annual

report questions with good faith effort will recieve full marks. There are no partial marks.

Students who do not complete the assigned annual report questions by the due date, for whatever reason (including technology issues), receive a grade of zero - meaning they did not participate or engage in the learning process. Since this assessment is meant to encourage participation in the learning process in a *timely* fashion, there are no "make-up" annual report questions or extensions. Late submissions are not accepted. Students either complete the annual report questions or not. There are no partial completion or partial grades.

To ensure timely completion, students are encouraged to plan their time accordingly. Do not wait until the last minute to complete each assigned set of annual report questions because undoubtably issues may arise (e.g., commitments, technology issues).

Lab Questions

For each lab, students are assigned specific lab questions to complete. Lab questions are listed in the Course Syllabus. Students must complete and submit (upload) the assigned lab questions through the "Assignments" function in Canvas prior to the start of that week's lab. These questions will be discussed during lab.

Lab questions are graded for completion (i.e. a reasonable attempt to fully complete the questions with good faith effort) and not technical accuracy of the responses. Students who fully complete the assigned lab questions with good faith effort will recieve full marks. There are no partial marks.

Students who do not complete the assigned lab questions by the due date, for whatever reason (including technology issues), receive a grade of zero - meaning they did not participate or engage in the learning process. Since this assessment is meant to encourage participation in the learning process in a *timely* fashion, there are no "make-up" lab questions or extensions. Students either complete the lab questions or not. Late submissions are not accepted. There are no partial completion or partial grades.

To ensure timely completion, students are encouraged to plan their time accordingly. Do not wait until the last minute to complete the assigned lab questions because undoubtably issues may arise (e.g., commitments, technology issues).

In-Lab Engagement

During each lab, students will have the opportunity to respond to two polling questions in Zoom, allowing them to earn engagement marks.

In total, there are 10 labs but only the student's 8 highest lab engagement marks will be considered. In other words, the lowest two lab engagement marks will not be counted. The selection of the two lowest lab engagement marks will be determined at the end of the course. If a student misses a lab or does not complete a polling question within a lab, regardless of the reason (e.g., sick, appointment, internet connectivity issues, personal commitment etc.), they will receive an engagement mark of zero because the student did not participate in the engagement opportunity.

The first polling question will be structured in a multiple-choice format and be technical in nature relating to the content covered in that lab. The second question will be qualitative and reflective in nature.

The first polling question will be launched in Zoom approximately half-way through the lab and the second polling question will be launched toward the end of the lab – however timing may vary slightly depending on the flow of the lab and therefore attendance throughout the lab is important. To alert students of an upcoming polling question, the lab instructor will make an

announcement approximately 5 minutes before launching a polling question.

For each polling question, students will have 2 minutes to read and respond to that specific polling question. Once the question time is completed, the lab instructor cannot grant a student an additional opportunity to complete the polling question regardless of the reason (e.g., student missed question, student's computer froze, student internet connectivity issues, student was in the bathroom etc.). Once a question is done – it is done. Do not ask your lab instructor to make "exceptions" - out of fairness to other students, they cannot.

In-Person Assessments

Students will complete the following in-person assessments individually during the assigned time:

- Midterm Examination
- Technical Quiz
- Final Examination

Midterm Examination

This in-class, closed-book (i.e., no notes, aids, books, internet, or other materials), midterm (assessment) will be timed and comprise 3-5 questions. The assessment will be a mix of technical (numerical and/or analytical), qualitative (discussion), and a case scenario, covering all classes and labs prior to the assessment date (i.e., inclusive and cumulative) including all readings, handout material, and postings on Canvas.

The instructor will distribute the assessment questions in-class. Students will have 90 minutes to complete the assessment on a device (e.g., laptop). At the end of the assessment, students will submit their responses in a Microsoft Word document for marking via Canvas.

Absence from Midterm

Students who miss a midterm examination must contact their instructor within 24 hours and provide the instructor with documentation substantiating the reason for the absence. If a midterm is missed based on an acceptable documented reason, the weight of the midterm will be allocated to the final examination (i.e. the student will write the final examination for the combined midterm and final examination weight). There is no "make-up" midterm.

Technical Quiz

This in-class, closed-book (i.e., no notes, books, aids, internet, or other materials), quiz (assessment) will be timed and comprise 3-5 questions. The assessment will focus on technical (numerical and/or analytical) questions covering all classes and labs prior to the assessment date (i.e., inclusive and cumulative) including all readings, handout material, and postings on Canvas. Questions will be similar to those practiced in labs and in Canvas.

The instructor will distribute the assessment questions in-class. Students will have 90 minutes to complete the assessment on a device (e.g., laptop). At the end of the assessment, students will submit their responses in a Microsoft Word document for marking via Canvas.

Absence from Quiz

Students who miss the quiz must email their course instructor within 24 hours and provide the course instructor with acceptable documentation substantiating the reason for the absence. If a quiz is missed based on an acceptable documented reason, the weight of the quiz will be allocated to the final examination (i.e. the student will write the final examination for the combined technical quiz and final examination weight). There is no "make-up" quiz.

Final Examination

This in-person, closed-book (i.e., no notes, books, aids, internet, or other materials), final examination (assessment)

will be timed and comprise 4-6 questions. The assessment will be a mix of technical (numerical and/or analytical), qualitative (discussion), and a case scenario, covering all classes and labs prior to the assessment date (i.e., inclusive and cumulative) including all readings, handout material, and postings on Canvas.

Student will have 120 minutes to complete the assessment on a device (e.g.. laptop). At the end of the assessment, students will submit their responses in a Microsoft Word document for marking via Canvas.

Absence from the Final

Refer to the “Schulich Policies” section in the Course Syllabus in Canvas.

Assessment Instructions - Relevant for Each In-Person Assessment

You are expected to have a device, such as a laptop, to be used during each in-person assessment. You must bring your device, including any necessary accessories (e.g., power cords), to each in-person classroom assessment. You are responsible to ensure your device is operational and has a fully-charged battery. You may also want to bring a basic standard calculator.

Before the Assessment

- Ensure your laptop screen is not set to “dark mode” (i.e., the background screen color is not dark or in a dark “theme”.).
- You will be asked to download a Microsoft Word and an *optional* Excel document from Canvas. You must use this Microsoft Word document, and only this specific Microsoft Word document, to write your responses. The Excel document provided is for optional use - for calculations, which will need to be copied and pasted into the Microsoft Word document. Work submitted on any other document(s) other than the Microsoft Word document provided will not be graded.
- Save and label your Microsoft Word document using your complete legal name and student number (i.e., first name, last name, student number).
- The instructor will physically distribute the assessment questions in-class.

During Assessment

- Respond to the assessment in the specific Microsoft Word document (see above).
- You may use the Excel document provided to perform calculations but must copy & paste the calculations back into the Microsoft Word document.
- Complete the assessment independently without reference to any materials (i.e, no notes, books, aids, internet, or other materials), files, or applications (except the specific Microsoft Word document and Excel) on your laptop - this is a "closed-book" assessment.
- To avoid any uncertainty, you may not use the internet or access any files or applications (except the specific Microsoft Word document and Excel) on your device at anytime during the assessment. Reference to internet includes internet-based technology such as websites, chat functions, messenger apps, "smartwatches", or similar. A breach of this instruction will constitute academic dishonesty and result in associated consequences.
- Cellphones are not permitted and cannot be used during the assessment for any reason (including calculations).
- Do not ask the instructor or proctor to interpret or provide further guidance on the questions. Make any necessary assumptions and be sure to state those assumptions in your response.
- Show all calculations. A response without supporting calculations will not receive full marks.
- Round all numerical calculations (and inputs into calculations) to two decimal points.

Note: The instructor or proctor cannot help resolve any technology issues. There will be no "technical support" available.

If, and only if, during the assessment your device stops operating or malfunctions, you will be asked to complete your assessment using paper and pen. Only the materials submitted at the end of the assesment will be graded (i.e., whatever you can submit such as paper or a mixture of paper and saved Microsoft Word document, if any).

Under no circumstance can you “send” your response to the instructor after leaving the assessment (e.g., when you get home, when your laptop is repaired or similar).

End of Assessment

- At the conclusion of the assessment, remain seated quietly and wait for instructions.
- When instructed to do so, upload your Microsoft Word document to Canvas.
- Submit all answers in the Microsoft Word document. Never submit a “link” to your Microsoft Word document (e.g., a link to a SharePoint site or Microsoft OneDrive). Other formats, such as Apple “pages”, PDFs, images, or similar are not acceptable. Handwritten responses will not be accepted.
- You will be provided reasonable time to upload your Microsoft Word document, containing your response, to Canvas. Double check that you have uploaded the correct Microsoft Word document.
- You can upload your Microsoft Word document into Canvas only once. If you make a mistake and upload the wrong document, you will not be able to upload a new version. If this occurs, inform your instructor, and then follow the steps below for emailing or saving to USB key
- If you are unable to upload your Microsoft Word document onto Canvas, you will be asked to either email your Microsoft Word document to the instructor or save your Microsoft Word document onto a USB key provided by the instructor.
    - If you are unable to either upload, email, or save your Microsoft Word document to a provided USB key within the reasonable time provided (e.g., by the end of class), you will receive a mark of zero (0).
    - Under no circumstance can you “send” your response to the instructor after leaving the assessment (e.g., when you get home, when your laptop is repaired or similar).
- You will be asked to return the physical assessment questions (which will be returned back to you once the assessment has been graded).
- Once the instructor or proctor has completed the required quality control procedures (e.g., checks, counts), they will make an announcement and confirm the end of the assessment.

To support academic honesty, Canvas automatically processes a student's submitted completed assessment through Turnitin. Any unusual similarities among student responses will be identified for further investigation.

“Extra” Assignments

To ensure all students receive the same assessment opportunities, there are no “extra” work that a student can undertake to receive additional marks or “boost” their grade. Please do not ask your instructor to provide you with “extra” assessment opportunities that are not available to other students. This is unfair.

CALCULATING COURSE GRADE

Expectations

Grades provide students with important feedback on their understanding of the course material, mastery of learning outcomes, and where they need to improve.

The guidelines below help ensure that grading practices are accurate, transparent, and consistent.

Process

A grade on a component (e.g., midterm) may be denoted as a percentage, grade-point, or letter. If a grade is denoted as a percentage or letter, a student can determine their grade point by associating the percentage or letter with the index system discussed below.

For each graded component, a student will be informed of the class grade:

- breakdown (e.g., by range)
- average

At the end of the semester, grades for each component will be multiplied by the weighting of that specific component and summed to determine the total average grade which will be converted into a letter grade. The letter grade corresponds to 9-value index system as outlined below.

In general, earlier components are likely to have lower grades and such grades are generally expected to increase, as students learn and master the material (i.e., as the semester progresses).

This course's index system is as follows:

Grade	Grade Point	Percent Range	Description
A+	9	90-100	Exceptional
A	8	80-89	Excellent
B+	7	75-79	Very Good
B	6	70-74	Good
C+	5	65-69	Competent
C	4	60-64	Fairly Competent
D+	3	55-59	Passing
D	2	50-54	Barely Passing
F	0	(below 50%)	Failing

Cases will be primarily assessed through a competency-based marking system.

Competency Based Marking

At the Schulich School of Business some assessments are competency based. Competency based education focuses on ensuring that every student has the necessary level of underlying technical knowledge *and* the practical skills to apply that knowledge effectively. It is a process that integrates formal technical knowledge with practical application.

A competency-based approach recognizes that knowledge is necessary but *not* sufficient for performing at an exceptional level.

Most **cases** will be evaluated based on a competency-based marking structure, where performance will be categorized as follows:

- Not Addressed (NA) – The student did not address and/or attempt the required (e.g., issue).
- Nominally Competent (NC) – The student addressed the required (e.g., issue), but the response was technically incorrect and/or lacked integration of relevant case facts.
- Reaching Competent (RC) – The student addressed the required (e.g., issue), but the response contained some technical errors and/or contained insufficient integration of relevant case facts.
- Competent (C) – The student addressed the required (e.g., issue), and the response was technically correct and contained sufficient integration of relevant case facts.
- Competent with Distinction (CD) - The student addressed the required (e.g., issue), and the response was technical correct, contained sufficient integration of relevant case facts, analyzed in-depth, and contained insightful relevant comments.

Each of the above categories will be equated with a specific numerical score. The total score for a case will be denoted as a percentage, grade-point, or letter.

To achieve excellence, it is expected that a student obtains a mix of C's and CD's.

To be successful, students will be required to apply their technical knowledge to case specific facts and provide useful, relevant, and professional responses.

Competency-based marking does not rely on one "right answer". Instead, competencey-based marking relies

heavily on judgment and allows for multiple possible responses to a single required (e.g., issue).

Bonus Grades

To ensure a consistent and equitable approach to grading, asking your instructor for discretionary “bonus” marks (or similar) is not appropriate. Please do not put forth such requests to your instructor.

CLASS-BY-CLASS SYLLABUS

Class 1 - Topic 1

Sep 9/25

Overview: Class 1

Topics

Course Introduction
International Reporting Standards
Standards for Private Enterprises
Financial Liabilities and Provisions
Case - Seedling Inc. - 3120 & 6140 Midterm Practice Case.doc (https://schulich.instructure.com/courses/13462/files/1550113?verifier=fM7XQUJe66MjxrVrKOiIuROgeT66x5ABNfYa2fev&wrap=1) (https://schulich.instructure.com/courses/13462/files/1550113/download?verifier=fM7XQUJe66MjxrVrKOiIuROgeT66x5ABNfYa2fev&download_frd=1)

Class Preparation

Textbook: Chapter 12
Read Course Syllabus

Format

Live, in person, on campus

Sep 10/25

Overview: Lab 1

Questions

A12-9
A12-12
A12-20
A12-23
A12-31 **(https://schulich.instructure.com/courses/9582/files/990904/download)**

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB W133 for those that need it.

Class 2 - Topic 2

Sep 16/25

Overview: Class 2

Topics

Financial Instruments: Long-term Debt
Shareholders' Equity

Class Preparation

Textbook: Chapter 13 & Chapter 14

Sep 17/25

Format

Live, in person, on campus

Overview: Lab 2

Questions

A13-5
A13-20
A13-39
A14-7
A14-14 (Case A-C)
(https://schulich.instructure.com/courses/9582/files/990904/download)

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB W133 for those that need it.

Class 3 - Topic 3

Sep 23/25

Overview: Class 3

Topic

Complex Debt and Equity Instruments

Class Preparation

Textbook: Chapter 15

Format

Live, in person, on campus

Sep 24/25

Overview: Lab 3

Questions

(https://schulich.instructure.com/courses/9582/files/990904/download) A15-7
A15-9
A15-17
A15-29
A15-41

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB W133 for those that need it.

Class 4 - Topic 4

Sep 30/25

Overview: Class 4

Topic

Accounting for Corporate Income Tax (Part I)

Class Preparation

Textbook: Chapter 16

Format

Live, in person

Oct 1/25

Overview: Lab 4

Questions

A16-2
A16-11
A16-21
A16-33

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB W133 for those that need it.

Class 5 - Topic 5

Oct 7/25

Overview: Class 6

Topic

Accounting for Tax Losses

Class Preparation

Textbook: Chapter 17

Format

Live, in person, on campus

Oct 8/25

Overview: Lab 5

Questions

A17-4
A17-8

A17-13
A17-35

Questions found in textbook.

Format
Live: Synchronous – Over Zoom. Room SSB W133 for those that need it.

Class 6 - Topic 6

Oct 21/25

Overview: Class 5

Midterm examination

Refer to Course Syllabus for information about the midterm examination.

Note: There is no class following the completion of the midterm.

Note: No lab associated with this class.

Co-curricular Days - Oct 11 to 17

Class 7 - Topic 7

Oct 28/25

Overview: Class 7

Topic
Leases

Class Preparation
Textbook: Chapter 18

Format
Live, in person, on campus

Oct 29/25

Overview: Lab 6

Questions
A18-1
A18-3
A18-5

A18-10
A18-26

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB W133 for those that need it.

Class 8 - Topic 8

Nov 4/25

Overview: Class 8

Topic

Post-employment Benefits

Class Preparation

Textbook: Chapter 19

Format

Live, in person, on campus

Nov 5/25

Overview: Lab 7

Questions

A19-2
A19-7
A19-21
A19-40

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB W133 for those that need it.

Class 9 - Topic 9

Nov 11/25

Overview: Class 9

Topics

EPS
Accounting Changes

Class Preparation

Textbook: Chapter 20 & Chapter 2`

Format

Live, in person, on campus

Nov 12/25

Overview: Lab 8

Questions

A20-10
A20-11 (basic only)
A21-3
A21-33

Questions found in textbook.

Format

Live: Synchronous – Over Zoom. Room SSB W133 for those that need it.

Class 10 - Topic 10

Nov 18/25

Overview: Class 10

Technical Quiz

Refer to Course Syllabus for information about the Technical Quiz.

Note: There is no class following the completion of the Technical Quiz.

Nov 19/25

Overview: Lab 9

Questions

DAIS Questions Part I - <Click to Download> **IT and DAIS Questions for Lab 9.docx (https://schulich.instructure.com/courses/13462/files/1509538?verifier=uxxVJsvL1opW7cPsN9VKI5KbSwaABxyBLaoBydF9&wrap=1) (https://schulich.instructure.com/courses/13462/files/1509538/download?verifier=uxxVJsvL1opW7cPsN9VKI5KbSwaABxyBLaoBydF9&download_frd=1)**

Format

Live: Synchronous – Over Zoom. Room SSB W133 for those that need it.

Class 11 - Topic 11

Nov 25/25

Overview: Class 11

Topic

Case

Class Preparation

Read & prepare assigned case - posted to Canvas

Format

Live, in person, on campus

Nov 26/25

Overview: Lab 10

Questions

DAIS Questions Part II - <Click here to Download> **IT and DAIS Questions for Lab 10.docx (https://schulich.instructure.com/courses/13462/files/1509541?verifier=w9D2obL6HBGGQlbwdzcSLC1wlvfBh1uT5Ao4RxvV&wrap=1) (https://schulich.instructure.com/courses/13462/files/1509541/download?verifier=w9D2obL6HBGGQlbwdzcSLC1wlvfBh1uT5Ao4RxvV&download_frd=1)**

Take-up technical quiz

Questions found in textbook.

Format

Remote and over Zoom. Lab instructor will set-up Zoom link for access.

Class 12 - Topic 12

Dec 2/25

Overview: Class 12

Topics

Review class

Administrative items (e.g., Course evaluation etc.)

Class Preparation

Instructor determined content – posted to Canvas

Format

Live, in person, on campus

Note: No lab associated with this class.

Final Examination Date

Final Exam

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

The course is a combination of textbook readings, Connect self-reflection questions, annual report questions, classes integrated with problems and cases, and labs. The Course Syllabus outlines the components and associated expectations for each class.

Much of the course is concerned with technical application and interpretation of financial information. Majority of class time involves analysis, not lecturing. Class discussions will be for presentation of the more complex aspects of the technical material and for answering student questions. Class time will not be used to repeat material that is adequately discussed in the textbook. Assesssments (e.g., midterm examination, technical quiz, final examination) will however cover all the assigned material (including materials posted to Canvas) and will not be restricted to the material explicitly discussed during class.

Class coverage may be ahead of, or behind, topics noted in the Course Syllabus, depending upon the particular difficulties experienced by the class. If assigned materials are not covered during class due to time constraints, students are still responsible for preparing and understanding the material. Regardless of class coverage, the student is responsible for all material noted in the course outline plus class discussions.

A minimum of 8 to 10 hours of work outside of class is required per week. To obtain the maximum benefit from classes, reading the assigned chapters and associated material beforehand is essential. Failure to do so may result in a student's inability to fully understand the lecture and participate in related class activities (e.g, group discussion) causing the student to potentially feel "lost" or "overwhelmed". This course is very technical and pre-reading is essential to understanding the content in the lecture. Advanced preparation is necessary in order to maximize the usefulness of classroom time.

Students that perform better in this course consistently attend class and lab, fully prepared to actively participate in discussions.

Organization of the Course

The following is an overview of how students are expected to approach the course. For complete details, refer to the Assignments and Classes section of the Course Syllabus.

Step 1 – Read Textbook Chapter(s)

For most classes, one or two textbook chapters are assigned as readings. Due to the complex material covered in class, it is essential that the assigned readings be completed prior to the start of that week's class.

Step 2 – Complete Connect Self-Reflection Questions

For most classes, there are assigned Connect self-reflection questions that must be completed prior to the start of that week's class.

Access these self-reflection questions by clicking into the relevant assignment module in Canvas or by accessing them directly in Connect.

Connect self-reflection questions are meant to provide you with an opportunity to self-assess your understanding of the textbook material. This self-reflection may also indicate areas where you need to go back and review content from the chapter. For areas that are unclear, you can ask questions in the class and/or the lab.

Step 3 – Complete Annual Report Questions

For most classes, annual report questions are assigned and posted in Canvas. Students must complete and submit

the assigned annual report questions through the "Assignments" function in Canvas prior to the start of that week's class. These questions will be discussed during the class.

You will need to go the Maple Leaf Foods website or sedarplus.ca to download the 2023 annual report for Maple Leaf Foods.

Step 4 - Attend Class

Attend the live, in-person, class on campus. Class are not recorded. If you miss a class, please obtain notes from a classmate.

PowerPoint slides may be posted on Canvas for each class. If posted, the PowerPoint slides are just teaching points not full descriptions of the content. These PowerPoint slides need to be supplemented with the readings from the textbook to gain an understanding of the accounting issues.

Annual report questions will be discussed during the class, so have a copy of your answers to these questions easily accessible.

For some lectures there may be an assigned video to watch on Canvas under the Echo 360 link that goes through some of the terminology related to the class topic. It is highly recommended that any videos, if posted, be reviewed.

Step 5 - Attend Lab

Labs are held virtually online over Zoom. The Zoom link can be accessed in the Zoom section of Canvas. Labs are delivered live and are for privacy reasons are not recorded.

Labs are an essential component of the course. In class, we will discuss the accounting concepts. The labs will be used to apply those concepts from class to technical questions. Your lab instructors will walk through the logic and how to approach these technical problems. The content will be discussed in class on the accounting issues, then the labs will be used to work through practical problems based on class content. The technical quiz is based on material similar to the technical problems discussed in the labs.

If a student misses a lab, it is their responsibility to obtain notes from a classmate on the topics covered including discussed solutions to assigned lab questions. For copyright reasons, solutions to lab questions are not posted or shared electronically – therefore do not ask your lab instructor to post or email solutions to lab questions.

If a student's home environment is not conducive to having the camera on (e.g., noise, privacy), the student should go to the allocated classroom at Schulich which will provide the student a suitable environment to have their camera on.

Lab questions listed in the Course Syllabus. Students must complete and submit (upload) the assigned lab questions through the "Assignments" function in Canvas prior to the start of that week's lab. These questions will be discussed during lab.

Step 6 - Practice

A student's success in the course is highly dependent on their understanding of both theoretical and applied aspects of accounting. Canvas Modules include a series of additional (optional) practice questions for students.

Scheduling Conflicts

Students are expected to attend all classes and labs. Students should coordinate their schedules to avoid planning known commitments (e.g., work, presentations, extra-curricular events, vacations, trips, ceremonies, family obligations, or similar) that conflict or overlap with scheduled class or lab time. To ensure consistency, the instructor cannot accommodate individual student requests regarding such scheduling conflicts. Students must resolve any such scheduling conflicts.

Students may attend only the class and lab in which they are enrolled.

Email Etiquette

All communication must be professional and respectful. In the age of social media, many students approach emailing similar to texting and other forms of digital communication, where the crucial conventions are brevity and informality. But most instructors consider emails closer to letters than to text messages. This style of writing calls for more formality, more thoroughness and more faithful adherence to the formal conventions of writing -- that is, salutations, spelling, punctuation, capitalization and most importantly tone.

No Recording of Classes or Labs

Students are not permitted to record any portion of a class or lab, audio or video, without the prior written permission of the instructor.

Copyright Notice

Course materials, including power point presentations, outlines, questions and solutions, assignments, and similar materials, are protected by copyright. The instructor and publisher are the exclusive owners of copyright in those materials they create. You may take notes and make copies of course materials for your own educational use. You may not record lectures, reproduce (or allow others to reproduce), post or distribute lecture notes, wiki material, and other course materials publicly and/or for commercial purposes without the prior written consent of the instructor.

Academic Integrity and Artificial Intelligence Tools

At York, the Senate Academic Conduct Policy prohibits the undocumented or unreferenced use of GenAI by students, while further allowing instructors to restrict the use of GenAI tools. Note that by default, any documented use of GenAI is not a breach of academic integrity unless explicitly prohibited by the instructor."

In this course, all assessments (including midterm examination, technical quiz, and final examination) and other submitted work (including responses to annual report questions and lab questions) must reflect **your own independent work**.

The use of **artificial intelligence (AI) programs, applications, or tools** (for example, ChatGPT or similar systems) is **strictly prohibited** in any form on assessments and submitted work.

This means you may not use AI to:

- Generate answers, explanations, responses, or solutions
- Draft or rewrite your work
- Check, edit, or "improve" your writing or responses
- Provide hints, outlines, or structure for your work

Simply put: **Do not use AI tools for assessments or submitted work in this course.**

Why? Because assessments are designed to measure your own understanding, skills, and effort. In this course, using AI undermines that purpose and constitutes **academic misconduct**.

Class Participation (contribution)

Students are strongly encouraged to participate in class discussions. Be prepared to engage in discussions and to put forth your position, questions, and opinions.

You will be given opportunities to think your way through questions posed to you – take this opportunity to practice your analytical skills. The class will be a rich learning environment if you are willing to take the risk to agree or disagree, to challenge thoughtfully while listening carefully to the contributions of others.

This course is not a memorization course - you will be pushed to use your analytical and critical thinking skills; therefore, taking the opportunity to practice your critical thinking and analytical skills will be extremely beneficial

as students prepare for their assessments.

The instructor may cold call on an individual or groups of students (depending on class size) to present a problem, assigned case, or answer specific questions during class.

GENERAL SCHULICH ACADEMIC POLICIES

Grading

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

Academic Honesty

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

Accommodations

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

Exams (Absence from)

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

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

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

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

Visiting Campus

All York community members share in the responsibility of keeping others safe on campuses, and to uphold professional and respectful interactions with one another. In this class, as elsewhere on campus, students must comply with all University health and safety regulations or protocols, including the following:

- Do not attend in-person activities at any of York University's campuses/locations when you are feeling unwell. Please complete a self-assessment on YU Screen to receive support from a member of the University's case and contact management team.
- Wear a high quality, snugly fitting mask that completely covers the mouth, nose, and chin in all indoor spaces on campus
- Do not eat or drink in instructional spaces, including research and shared spaces (e.g., Libraries), unless for urgent health reasons.

More Information about COVID-19 health and safety measures can be found on the **Better Together (https://www.yorku.ca/bettertogether/)** website.

Encouraging a Community of Care

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

Student Rights and Responsibilities

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

The Schulich School of Business strongly supports and adheres to the **Code of Student Rights and Responsibilities (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)** . All students have rights and responsibilities as outlined in this document and are expected to uphold the identified values for the benefit of the entire community.

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

Take time to fully review the Code of Student Rights and Responsibilities: https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/ (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)

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

Deliverables

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Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Abu Rahaman, Accounting Area Representative on the BBA Committee
Date: November 3, 2025
Re: ACTG 4600 3.0 Add a Blended Format of Course Delivery

Motion:

Faculty Council approves the proposal to add a blended format of course delivery for the following course in the BBA program: ACTG 4600 3.0, Auditing Standards and Applications.

Rationale:

In Fall 2025 senior year accounting students' requested that the course delivery for this course be changed to blended, and in particular to deliver the technical component of the course online. In response, and with ADA permission, this course was delivered, with permission, in a blended format, to assess the impact. At the end of the semester, we obtained feedback from students and instructors, and all was overwhelmingly positive, as evidenced by the increase in class attendance that is now over 95% and there also was a consistency in course grades.

The blended teaching format facilitates course content being taught online as well as in the in-person depending upon the most appropriate mode of the content. Learning outcomes for this course have not been altered. What we have already learned is that some types of learning are better accommodated inperson and others online: For example, interactive learning that can include introduction of new material and case study discussions, appear to be better delivered in person; however, the technical accounting applications appear to be better absorbed by students through online sessions.

In conclusion, taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further evaluate how different types of content, formats, and techniques encourage students learning and engagement. Our request also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

Schulich
School of Business
York University

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   Schulich BBA Program

2. Responsible Unit:
   ACTG

3. Subject Code (Rubric) and Course Number:
   ACTG 4600

4. Credit Value:
   3.00

5. Long Course Title:
   Auditing Standards and Applications

6. Short Course Title:
   Auditing Standards and Applications

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

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

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

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

   In Fall 2025 senior year accounting students' requested that the course delivery for this course be changed to blended, and in particular to deliver the technical component of the course online. In response, and with ADA permission, this course was delivered, with permission, in a blended format, to assess the impact. At the end of the semester, we obtained feedback from students and instructors, and all was overwhelmingly positive, as evidenced by the increase in class attendance that is now over 95% and there also was a consistency in course grades.

   The blended teaching format facilitates course content being taught online as well as in the in-person depending upon the most appropriate mode of the content. Learning outcomes for this course have not been altered. What we have already learned is that some types of learning are better accommodated inperson and others online: For example, interactive learning that can include introduction of new material and case study discussions, appear to be better delivered in person; however, the technical accounting applications appear to be better absorbed by students through online sessions.

   In conclusion, taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further evaluate how different types of content, formats, and techniques encourage students learning and engagement. Our request also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

Schulich
School of Business
York University

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):
Mode of delivery: in person	Mode of delivery: in person, blended Changes to the course syllabus are reflected in the attached updated syllabus. Course title, description, and learning outcomes remain identical to the existing course information

11. Enrolment Notes:

n/a

12. Consultation:

n/a

Originator:

Signature	November 3, 2025 Date
Abu Rahaman Name	ACTG Area or Specialization

Approvals:

Area or Specialization

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

Signature	Nov 3, 2025 Date

Schulich
School of Business
York University

Linda Thorne	ACTG
Name	Area or Specialization

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA, iBBA Programs
Name of Program Director	Program

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

last updated: Aug 22 2:08pm EDT.

Schulich School of Business

ACTG4600 F2025 **CREDITS: 3.00**

ACTG 4600 A - AUDITING STANDARDS & APPLICATIONS

THU 08:30-11:20 SSB S126

COURSE DIRECTOR

Bartosz Amerski

bartosza@schulich.yorku.ca

416 736 5062

S344 SSB

ADMIN

Dhaval Patel

pdhaval@schulich.yorku.ca

S344 SSB

This course will be offered through a combination of virtual and in-person meetings; the instructor will define whether virtual components are synchronous or asynchronous. Please see the class-by-class schedule for details on which classes are in person and which are virtual.

BARTOSZ AMERSKI - INSTRUCTOR

BRIEF DESCRIPTION

This course focuses on the standards and applications underlying the latest function and the responsibilities of external and internal auditors. The theory of audit evidence and certain basic techniques are used to provide an understanding of auditing methodology. The auditor's responsibility beyond the financial audit and current developments in auditing are also examined. Students may be expected to complete a research paper or project.
Note: Not available to exchange students visiting Schulich. Open to Schulich undergraduate students with minimum Year 4 academic standing.
Prerequisites: SB/ACTG 3120 3.00 Students who were on exchange in Year 3 may take SB/ACTG 3120 3.00 and SB/ACTG 4600 3.00 concurrently.

COURSE LEARNING OUTCOMES

For those considering a career as a public accountant, this first auditing course will provide you with an understanding of the concepts of auditing and the auditing process.

The role of, and standards for, auditing continue to evolve. The traditional audit changes in response to factors such as technological advancement, the changing needs of users of financial information, regulatory changes, and the increasingly litigious environment in which auditors practice.The evolution of auditing stresses the importance of professional judgment, a critical cognitive skill in the practice of auditing.

A basic premise of this course is that “concepts” and “procedures” are inseparable. It is difficult to know when the concepts finish and procedures start. A second premise of this course is that the professional must begin with concepts and end with procedures. It is critical to know why something is done before attempting to determine how to do it best.

This course will focus on auditing concepts. It will not ignore auditing procedures, but will refer to them to illustrate the concepts. Detailed procedural knowledge is better developed “on the job”. It is the aim of this course to provide a general perspective in which procedures, as they are learned, can be placed. To this end, this course stresses the identification of financial statement assertions, the evaluation of the risks to which these assertions are susceptible, and the methodology of planning to assess the degree to which these risks give rise to error or fraud in financial information. Both the methodology, and the concepts which underlie it, entail professional judgement, and the objective of the course is to give participants a feel for the ways in which professional judgment is learned and applied in an auditing context. You will also be given the opportunity to improve other cognitive skills, such as comprehension, analysis, application, evaluation and synthesis. Ethical and professional issues will also be considered.

COURSE MATERIAL

The required text for this course includes the following:

1. Alvin Arens, Randal J Elder, Mark S. Beasley, Chris E. Hogan, Joanne C. Jones, Bartoz M Amerski. Spring 2024. Auditing: *The Art and Science of Assurance Engagements.* Sixteenth Edition. Toronto, Canada: Pearson. ISBN: 9780137910861

(currently only available as Ebook for $67.99 CAD). Please note MyLab is **not** a requirement for this course.

2. Alla Volodina, Marc Colasanti & Alexandra Popa. Jan 2024. *Calculators and Cash: Case Studies in Financial Accounting, Audit, and More*. Toronto, Canada Canadian Scholars.

Purchase Options:

Hard-Copy (ISBN: 9781773383903): $52.95 CAD

Ebook Reflowable Layout (ISBN: 9781773383927): $44.95 CAD (CEB Ebook option listed on YU Bookstore site)

Ebook Fixed Layout (ISBN: 9781773383910): $44.95 CAD (https://canadianscholars.ca/book/calculators-and-cash/)

3. CPA Handbook - Assurance. Free Download:**http://edu.knotia.ca.ezproxy.library.yorku.ca/knowledge/Home.aspx?productid=1 (http://edu.knotia.ca.ezproxy.library.yorku.ca/knowledge/Home.aspx?productid=1)**

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date

WRITTEN ASSIGNMENTS: EVALUATION

In-Class Assignments

In-class assignments will include a substantial case analysis question. All assignments and final exam must be submitted prior to leaving the exam room. Assignments and final exam submitted after the student had left the exam room will not be graded.

Students who miss the In-class assignments must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. Instructors may request that students submit a copy of their documentation to Student & Enrolment Services. The weight of the missed assignment will be carried to the final exam.

Group Project

A group project aimed at allowing students to prepare an audit plan for a real company will be carried out. Details on the project will be provided early in the semester.

CALCULATING COURSE GRADE

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

Course Grade

Assignments	30%
Participation	10%
Group Project and Presentations	20%
Final Examination	40%
	100%

Grades and Expectations:

Grades provide students with important feedback on their understanding of the course material, mastery of learning outcomes, and where they need to improve.

The guidelines below help ensure that grading practices are accurate, transparent, and consistent.

Process - A grade on a component (e.g., midterm) may be denoted as a percentage, grade-point, or letter.

If a grade is denoted as a percentage or letter, a student can determine their grade point by associating the percentage or letter with Schulich's 9-value index system discussed below.

For each graded component, a student will be informed of the class grade:

- breakdown (e.g., by range)
- average

At the end of the semester, grades for each component will be multiplied by the weighting of that specific component and summed to determine the total average grade which will be converted into a letter grade. The letter grade corresponds to Schulich's 9-value index system as discussed below.

In general, earlier components are likely to have lower grades and such grades are generally expected to increase, as students learn and master the material (i.e., as the semester progresses).

Cases will be primarily assessed through a competency-based marking system.

Schulich's 9-value index system for undergraduate students is as follows.

Grade	**Grade Point / Index Value**	**Percent Range (Schulich guideline only)**	**Description**
A+	9	90-100	Exceptional
A	8	80-89	Excellent
B+	7	75-79	Very Good
B	6	70-74	Good
C+	5	65-69	Competent
C	4	60-64	Fairly Competent
D+	3	55-59	Passing
D	2	50-54	Barely Passing
F	0	(below 50%)	Failing

GRADING SCHEME

A+	100%	to	89.5%
A	< 89.5%	to	79.5%
B+	< 79.5%	to	74.5%
B	< 74.5%	to	69.5%
C+	< 69.5%	to	64.5%
C	< 64.5%	to	59.5%
D+	< 59.5%	to	54.5%
D	< 54.5%	to	49.5%
F	< 49.5%	to	0%

WRITTEN ASSIGNMENTS: DESCRIPTIONS

CLASS-BY-CLASS SYLLABUS

Class 1 - September 4: Introduction to Auditing

- Chapters covered: Ch1, Ch2, Ch3, Ch4

Class 2 - September 11: Overview of the Audit Process

- Chapters covered: Chapter 6, 7 and 10
- Reminder: Pls bring your casebook: Calculators&Cash

Class 3 - September 18: Discuss SPS Case Study and Assertions

- Chapters covered 7, 8, 9, 10
- Reminder: Calculators&Cash - SmartyPants & Skirts case

Class 4 - September 25: Procedures and Evidence

- Chapters covered 7, 8, 9, 10

Class 5 - October 2: Procedures, continued

- Chapters covered; 7, 8, 9, 10

Class 6 - October 9: Putting it all together

- Take-up practice case

Co-curricular Days (October 11-17)

Class 7 - October 23: Assignment#1 Week

- No Class - Common Assignment #1 (Thursday At 7 PM)

Assignment #1

Class 8 - October 30: Control Environment + Purchase / Expense cycle

Class 9 - November 6: Revenue Cycle

- Chapters covered: 12 and 14

Class 10 - November 13 : Assignment #2 Week

- No Class - Common Assignment #2 (Thursday At 7 PM)

Assignment #2

Class 11 - November 20: Payroll, Completion of Audit + Technology

- Chapters covered: 5, 15 and 18

Class 12 - November 27: Take Up Case Study

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

Students are expected to come to class fully prepared. The classroom format will be interactive and this means students will have read and prepared all of the assigned material. If students have not prepared for the in-class discussions, they may miss some material as it will not necessarily be discussed during class time. It is further worth noting that examination content may be drawn from this material, in addition to the group project, and any in-class and written assignments.

Courtesy in the classroom is crucial to an effective learning environment. Discourteous, disturbing or disruptive behaviour will not be tolerated. The following must also be observed:

1. Students should show up on time.
2. Students should direct in-class comments and questions to the entire class.
3. All cell phones and pagers must be turned off.

The class participation component of your final grade is based on class attendance (5%) and active participation in class discussion (5%). Since participation is dependent upon preparation, your instructor may assess preparation by assigning a series of short, weekly online quizzes.

***Copyright**:* Course materials, such as lectures, PowerPoint slides, tests, course notes, outlines, and similar materials, are protected by copyright. As creator of those materials, your instructor is the exclusive copyright owner. Students may take notes and make copies of course materials for personal use; however, further reproduction and distribution of course materials (for e.g. uploading materials to a commercial website) is prohibited unless permission has been explicitly granted.

GENERAL SCHULICH ACADEMIC POLICIES

Grading

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

Academic Honesty

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

Accommodations

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

Exams (Absence from)

Final
Students must contact their course instructor within 24 hours of missing a final examination. Students must also submit a completed Deferred Standing Request Form to Student & Enrolment Services within 48 hours. Student & Enrolment Services' email is **undergraduate@schulich.yorku.ca** **(mailto:undergraduate@schulich.yorku.ca)** . Student & Enrolment Services will notify the instructor and copy the student by email if appropriate documentation has been received.

Formal documentation* (e.g. **Attending Physician's Statement** **(https://registrar.yorku.ca/pdf/attending-physicians-statement.pdf)** , Counselor's Statement, death certificate, etc.) regarding the reason for missing the exam must be submitted electronically via file upload as part of the form.

The Deferred Standing Request form can be found at **https://schulich.yorku.ca/exam-deferral** **(https://schulich.yorku.ca/exam-deferral)** .

Visiting Campus

All York community members share in the responsibility of keeping others safe on campuses, and to uphold professional and respectful interactions with one another. In this class, as elsewhere on campus, students must comply with all University health and safety regulations or protocols, including the following:

- Do not attend in-person activities at any of York University's campuses/locations when you are feeling unwell. Please complete a self-assessment on YU Screen to receive support from a member of the University's case and contact management team.
- Wear a high quality, snugly fitting mask that completely covers the mouth, nose, and chin in all indoor spaces on campus
- Do not eat or drink in instructional spaces, including research and shared spaces (e.g., Libraries), unless for urgent health reasons.

More Information about COVID-19 health and safety measures can be found on the **Better Together** **(https://www.yorku.ca/bettertogether/)** website.

Encouraging a Community of Care

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

Student Rights and Responsibilities

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

The Schulich School of Business strongly supports and adheres to the **Code of Student Rights and Responsibilities** **(https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)** . All students have rights and responsibilities as outlined in this document and are expected to uphold the identified values for the benefit of the entire community.

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

Take time to fully review the Code of Student Rights and Responsibilities:
https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/ **(https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)**

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

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Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Abu Rahaman, Accounting Area Representative on the BBA Committee
Date: November 3, 2025
Re: ACTG 4710 3.0 - Add a Blended Format of Course Delivery

Motion:

Faculty Council approves the proposal to add a blended format of course delivery for the following course in the BBA program: ACTG 4710 3.0, Introduction to Income Taxation.

Rationale:

In Fall 2025 senior year accounting students' requested that the course delivery for this course be changed to blended, and in particular to deliver the technical component of the course online. In response, and with ADA permission, this course was delivered, with permission, in a blended format, to assess the impact. At the end of the semester, we obtained feedback from students and instructors, and all was overwhelmingly positive, as evidenced by the increase in class attendance that is now over 95% and there also was a consistency in course grades.

The blended teaching format facilitates course content being taught online as well as in the in-person depending upon the most appropriate mode of the content. Learning outcomes for this course have not been altered. What we have already learned is that some types of learning are better accommodated inperson and others online: For example, interactive learning that can include introduction of new material and case study discussions, appear to be better delivered in person; however, the technical accounting applications appear to be better absorbed by students through online sessions.

In conclusion, taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further evaluate how different types of content, formats, and techniques encourage students learning and engagement. Our request also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

Schulich
School of Business
York University

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   Schulich BBA Program

2. Responsible Unit:
   ACTG

3. Subject Code (Rubric) and Course Number:
   ACTG 4710

4. Credit Value:
   3.00

5. Long Course Title:
   Introduction to Income Taxation

6. Short Course Title:
   Introduction to Income Taxation

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

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

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

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

   In Fall 2025 senior year accounting students' requested that the course delivery for this course be changed to blended, and in particular to deliver the technical component of the course online. In response, and with ADA permission, this course was delivered, with permission, in a blended format, to assess the impact. At the end of the semester, we obtained feedback from students and instructors, and all was overwhelmingly positive, as evidenced by the increase in class attendance that is now over 95% and there also was a consistency in course grades.

   The blended teaching format facilitates course content being taught online as well as in the in-person depending upon the most appropriate mode of the content. Learning outcomes for this course have not been altered. What we have already learned is that some types of learning are better accommodated inperson and others online: For example, interactive learning that can include introduction of new material and case study discussions, appear to be better delivered in person; however, the technical accounting applications appear to be better absorbed by students through online sessions.

   In conclusion, taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further evaluate how different types of content, formats, and techniques encourage students learning and engagement. Our request also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

Schulich
School of Business
York University

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):
Mode of delivery: in person	Mode of delivery: in person, blended Changes to the course syllabus are reflected in the attached updated syllabus. Course title, description, and learning outcomes remain identical to the existing course information

11. Enrolment Notes:

n/a

12. Consultation:

n/a

Originator:

Signature	November 3, 2025 Date
Abu Rahaman Name	ACTG Area or Specialization

Approvals:

Area or Specialization

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

Signature	Nov 3, 2025 Date

Schulich
School of Business
York University

Linda Thorne	ACTG
Name	Area or Specialization

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA, iBBA Programs
Name of Program Director	Program

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

last updated: Sep 01 7:09am EDT.

Schulich School of Business

ACTG4710 F2025 **CREDITS: 3.00**

ACTG 4710 A - INTRODUCTION TO INCOME TAXATION

WED 11:30-14:20 SSB S124

Lab Schedule

THU 17:30 - 18:50 ONLINE

COURSE DIRECTOR

Beppino Pasquali

bpasquali@schulich.yorku.ca

416.736.2100 Ext. 44610

S344D SSB

ADMIN

Roberta Parris-Toney

parris@schulich.yorku.ca

S344K SSB

The lab for this course will be conducted as virtual, synchronous meets. For more details, please refer to Canvas

BEPPINO PASQUALI - INSTRUCTOR

Beppino Pasquali is a Canadian Chartered Professional Accountant (FCPA, FCA) with 30 years of experience in accounting and taxation for small to medium sized companies. He advises clients in achieving growth and shareholder value. His considerable experience is evident in the seminar as he incorporates real life cases.

Beppino lectures in the Kellogg-Schulich EMBA, MBA and BBA programs in the field of financial and managerial accounting at the Schulich School of Business at York University in Toronto, Canada. He also lectures in the Kellogg-Recanati EMBA program in Tel Aviv, Israel. He also lectures on taxation, estate planning and investments for the Canadian Securities Institute. He authored “Personal Taxation Planning”, a Canadian taxation textbook, adopted by the Canadian Securities Institute.

Beppino has trained hundreds of sales and customer service representatives, managers, executives and professionals. His “Financial and Managerial Accounting for Non-Financial Manager” course is one of the most attended courses at the Executive Learning Centre at the Schulich School of Business at York University.

BRIEF DESCRIPTION

The basic concepts and techniques of income taxation and applications to personal and corporate contexts are examined. Emphasis is placed upon accounting applications.
Note: Not available to exchange students visiting Schulich. Open to Schulich undergraduate students with minimum Year 4 academic standing.
Prerequisites: SB/ACTG 3120 3.00 Students who were on exchange in Year 3 may take SB/ACTG 3120 3.00 and SB/ACTG 4710 3.00 concurrently.

COURSE LEARNING OUTCOMES

This course is designed to provide students with a basic knowledge of the Income Tax Act (ITA) and its administration. The course will cover the introductory principles and practice of individual and corporate income taxation. The course will stress the use of the ITA to solve tax problems.

COURSE MATERIAL

Required reading for this course includes the following books:

1. Nathalie Johnstone, Devan Mescall & Julie Robson, Introduction to Federal Income Taxation In Canada with Study Guide, 2025-2026, Wolters Kluwer ($269)

2. Canadian Income Tax Act with Regulations, Annotated, Academic, 2025, Wolters Kluwer. ***THE INCOME TAX ACT MUST BE HARD COPY -*** ($185)

The above books can be purchased from the York University bookstore - https://www.bookstore.yorku.ca/site_textbook_landing_page.asp?. Package of two books - $431.30.

References:

1. Canada Revenue Agency (CRA), **www.cra.gc.ca (http://www.cra.gc.ca)**

2. Canada Tax Cases (CCH or Carswell), **www.canlii.ca (http://www.canlii.ca)**

3. W.J. Buckwold & J. Kitunen, *Canadian Income Taxation, Planning and Decision Making,* Latest Edition, McGraw-Hill Ryerson

4. Canadian Tax Foundation Publications

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Quiz 1 10%			
Quiz 1 - 11:30 am		10%	Wed Sep 17, 2025 at 12:30pm EDT
Quiz 2 10%			
Quiz 2 - 11:30 am		10%	Wed Oct 1, 2025 at 12:30pm EDT
Quiz 3 10%			
Quiz 3 - 11:30 am		10%	Wed Nov 19, 2025 at 12:30pm EST
Midterm Examination 30%			
Midterm Exam - 11:30 am		30%	Wed Oct 22, 2025 at 02:00pm EDT

GRADING SCHEME

A+	100%	to	89%
A	< 89%	to	79%
B+	< 79%	to	74%
B	< 74%	to	69%
C+	< 69%	to	64%
C	< 64%	to	59%
D+	< 59%	to	54%
D	< 54%	to	49%
F	< 49%	to	0%

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Quiz 1 - 11:30 am.

Due Date: Wed Sep 17, 2025 at 12:30pm EDT

There will be three quizzes during the term. The quizzes will be 60 minutes and will be done at the beginning of the lecture, as noted in the class schedule, below. Students will be given 60 minutes to prepare a response to the quiz. The quizzes will be closed book (except you can use the hardcopy version of the Income Tax Act) and done in class, using

exam booklets. The Income Tax Act cannot have any notes on the pages or page inserts. The proctors will be examining your Income Tax Act during the quiz to ensure it conforms to this requirements.

The questions for the quizzes will be composed of questions that were assigned in the labs or very similar questions. The purpose of the Quiz is to ensure that the materials from the labs were understood by the student and will help you prepare for the mid-term and final exams.

If you miss the quiz due to documented medical reasons the mark will be allocated to the midterm or final exam, as applicable.

Quiz 2 - 11:30 am.

Due Date: Wed Oct 1, 2025 at 12:30pm EDT

There will be three quizzes during the term. The quizzes will be 60 minutes and will be done at the beginning of the lecture, as noted in the class schedule, below. Students will be given 60 minutes to prepare a response to the quiz. The quizzes will be closed book (except you can use the hardcopy version of the Income Tax Act) and done in class, using exam booklets. The Income Tax Act cannot have any notes on the pages or page inserts. The proctors will be examining your Income Tax Act during the quiz to ensure it conforms to this requirements.

The questions for the quizzes will be composed of questions that were assigned in the labs or very similar questions. The purpose of the Quiz is to ensure that the materials from the labs were understood by the student and will help you prepare for the mid-term and final exams.

If you miss the quiz due to documented medical reasons the mark will be allocated to the midterm or final exam, as applicable.

Quiz 3 - 11:30 am.

Due Date: Wed Nov 19, 2025 at 12:30pm EST

There will be three quizzes during the term. The quizzes will be 60 minutes and will be done at the beginning of the lecture, as noted in the class schedule, below. Students will be given 60 minutes to prepare a response to the quiz. The quizzes will be closed book (except you can use the hardcopy version of the Income Tax Act) and done in class, using

exam booklets. The Income Tax Act cannot have any notes on the pages or page inserts. The proctors will be examining your Income Tax Act during the quiz to ensure it conforms to this requirements.

The questions for the quizzes will be composed of questions that were assigned in the labs or very similar questions. The purpose of the Quiz is to ensure that the materials from the labs were understood by the student and will help you prepare for the mid-term and final exams.

If you miss the quiz due to documented medical reasons the mark will be allocated to the midterm or final exam, as applicable.

Midterm Exam - 11:30 am.

Due Date: Wed Oct 22, 2025 at 02:00pm EDT

Materials eligible for examinations include all assigned readings, handout material, lectures, class discussions, questions and labs.

The midterm exam will be 150 minutes long and will commence at the start of the lecture. Students will be given 150 minutes to prepare a response to the midterm, using pen and paper. Computers will NOT be used to write any assessments in this course.

You may bring your own hard copy of the Income Tax Act ("ITA") to the midterm for reference, if you like. You may use tabs (maximum 1.25 cm by 4 cm) labeled with section numbers and/or titles only. You may also highlight and/or underline sections or areas you feel are important. However, ***you are not permitted to write anything in the ITA nor are you permitted to add any "inserts" or additional content into the ITA of any kind***. You should also bring a non-programmable calculator, as calculations will be required during the midterm. Aside from the ITA and a non-programmable calculator, ***no other notes or other aids of any kind are permitted in the midterm***.

Your compliance with the above will be monitored by the exam invigilators. Violations of the above rules will result in a confiscation of the offending material(s) and the commencement of an official "academic dishonesty" investigation.

Absence from Midterm Exam:

Students who miss a midterm examination must contact their instructor within 24 hours and provide the instructor with documentation substantiating the reason for the absence. If a midterm is missed based on an acceptable documented reason, the weight of the midterm examination will be allocated to the final examination. There is no "make-up" midterm exam.

CLASS-BY-CLASS SYLLABUS

Week 1

Sep 3/25

Overview: Week 1

Topic

Overview of the course
Introduction to the Income Tax Act and related legislation
Liability for income tax – residents and non-residents
Concept of residence
Concept of income

Assigned Readings (ignore Advanced topics, unless discussed in class)

J, M & R – Chapters 1, 2

Sep 4/25

Overview: Lab 1 - (REMOTE via Zoom - link TBA)

Lab 1 Questions:
Chapter 2 Assignment Problem 10
Chapter 2 Assignment Problem 6

Week 2

Sep 10/25

Overview: Week 2

Topic

Employment Income

Assigned Readings (ignore Advanced topics, unless discussed in class)

J, M & R – Chapter 3
Class Preparation Task 1

Sep 11/25

Overview: Lab 2 - (REMOTE via Zoom - link TBA)

Lab 2 Questions:
Chapter 3 Assignment Problem 1
Chapter 3 Assignment Problem 2
Chapter 3 Assignment Problem 16 (use simplified formula for auto leases)

Week 3

Sep 17/25

Overview: Week 3

Topic

Income from business

Assigned Readings (ignore Advanced topics, unless discussed in class)

J, M & R – Chapter 4 (ignore Limitation on Accrued Expenses and Unpaid Amounts; Discount on Debt Obligations)

Quiz

Quiz #1

Sep 18/25

Overview: Lab 3 - (REMOTE via Zoom - link TBA)

Lab 3 Questions:

Chapter 4 Assignment Problem 13
Chapter 4 Assignment Problem 16

Week 4

Sep 24/25

Overview: Week 4

Topic

The CCA System for Depreciable Property Including Intangibles

Assigned Readings (ignore Advanced topics, unless discussed in class)

J, M & R – Chapter 5
Class Preparation Task 2

Sep 25/25

Overview: Lab 4 - (REMOTE via Zoom - link TBA)

Lab 4 Questions:

Chapter 5 Assignment Problem 1 (you can use the textbook approach, instead of using Schedule 8. However, please review Schedule 8, as that is what is used in filing tax returns)
Chapter 5 Assignment Problem 13

Week 5

Oct 1/25

Overview: Week 5

Topic

Income from property

Oct 2/25

Assigned Readings (ignore Advanced topics, unless discussed in class)

J, M & R – Chapter 6 (Ignore Purchasing An Accrued Interest Bond)

Quiz

QUIZ #2

Overview: Lab 5 - (REMOTE via Zoom - link TBA)

Lab 5 Questions:

Chapter 6 Assignment Problem 1
Chapter 6 Assignment Problem 8
Chapter 6 Assignment Problem 9

Week 6

Oct 8/25

Overview: Week 6

Topic

Capital gains and losses

Assigned Readings (ignore Advanced topics, unless discussed in class)

J, M & R – Chapters 7 (ignore Mutual Fund taxation, Replacement Property and Involuntary Dispositions and Voluntary Dispositions)
Class Preparation Task 3

Oct 9/25

Overview: Lab 6 - (REMOTE via Zoom - link TBA)

Lab 6 Questions:

Chapter 7 Assignment Problem 5
Chapter 7 Assignment Problem 6
Chapter 7 Assignment Problem 11

Co-curricular Days - Oct 11-17

Week 7

Oct 22/25

Overview: Week 7

Midterm Examination

Week 8

Oct 29/25

Overview: Week 8

Topic

Other sources of income and deductions

Assigned Readings (ignore Advanced topics, unless discussed in class)

J, M & R – Chapter 9 (general review of OAS Clawback; Ignore Annuity Payments; RDSP; Restrictive Covenants, Flat-Rate deductions by administrative practices for moving expenses; Expenses of Residents Absent From Canada)
Class Preparation Task 4

Oct 30/25

Overview: Lab 7 - (REMOTE via Zoom - link TBA)

Lab 7 Questions:
Chapter 9 Assignment Problem 2
Chapter 9 Assignment Problem 7
Chapter 9 Assignment Problem 1 (Ignore flat-rate deductions by Admin practice)

Week 9

Nov 5/25

Overview: Week 9

Topic

Taxable income and taxes payable for individuals

Assigned Readings (ignore Advanced topics, unless discussed in class)

J, M & R – Chapter 10
(Ignore ordering of Division C deductions; ignore taxable income of non-residents; Ignore tax on old age security benefits; Ignore ordering of credits; ignore income not earned in a province; Ignore refundable amounts; Ignore minimum Tax).

Nov 6/25

Overview: Lab 8 - (REMOTE via Zoom - link TBA)

Lab 8 Questions:
Chapter 10 Assignment Problem 5
Chapter 10 Assignment Problem 8
Chapter 10 Assignment Problem 22 (ignore section 3 ordering rules)

Week 10

Nov 12/25

Overview: Week 10

Topic

Taxable income and taxes payable for corporations

Nov 13/25

Assigned Readings (ignore Advanced topics, unless discussed in class)

J, M & R – Chapter 11
Class Preparation Task 5

Overview: Lab 9 - (REMOTE via Zoom - link TBA)

Lab 9 Questions:
Chapter 11 Assignment Problem 5
Chapter 11 Assignment Problem 6 (ignore FTC calculations- assume FTC=Tax withheld)
Chapter 11 Assignment Problem 7

Week 11

Nov 19/25

Overview: Week 11

Topic

Integration of business and investment income for private corporations

Assigned Readings (ignore Advanced topics, unless discussed in class)

J, M & R – Chapter 12

Quiz

QUIZ #3

Nov 20/25

Overview: Lab 10 - (REMOTE via Zoom - link TBA)

Lab 10 Questions:
Chapter 12 Assignment Problem 3
Chapter 12 Assignment Problem 4
Chapter 12 Assignment Problem 8 – ignore part D (recording journal entries)

Week 12

Nov 26/25

Overview: Week 12

Topic

Integration of business and investment income for private corporations – continued
Review for Final Exam

Assigned Readings (ignore Advanced topics, unless discussed in class)

J, M & R – Chapter 12

Nov 27/25

Overview: Lab 11 (REMOTE via Zoom - link TBA)

Lab 11 Questions:

Chapter 12 Assignment Problem 15 (ignore d)
Chapter 12 Assignment Problem 11 (only a, b, c & d)

Zoom Link:

Final Exam

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

This course covers a substantial amount of complex tax law in a short period of time. Accordingly, students taking this course will be expected to carry a heavy workload and should plan to spend at least 12 hours per week reading and preparing the assignments. (This estimate does not include time spent in lectures.) In addition to assigned readings, students will be expected to read and understand the relevant provisions of the ITA.

The classroom sessions will consist primarily of lectures, using Zoom, with the balance of time spent problem solving and clarifying reading material.

Poll Everywhere for lab attendance (10%)

Attendance at labs will be tracked using Poll Everywhere. There will be two or more Poll Everywhere questions in each lab. The total points available will be the same each week and will be spread over all the questions asked in a given week. The poll questions are not graded for technical correctness, but rather, participation. In other words, you will not lose points for selecting a wrong answer.

Students who do not attend the lab for whatever reason, will receive a grade of zero, meaning they did not participate or engage in the learning process. Since this assessment is meant to encourage participation in the learning process during the live lab, there are no “make-up” assessments or extensions. Students either complete the assessment or not.

Your lab grade will be determined after dropping your lowest score on ONE week.

It is extremely important for students to do the assigned readings and review the relevant provisions of the ITA in advance of the lecture. Students should bring the ITA to class.

Labs (Thursdays, 17:30 – 19:00) - REMOTE

Lab sessions provide students the opportunity to cover problems related to course material in a structured setting. There are pre-assigned problems for the labs. Labs are an integral part of the course and lab material will not be covered in class. In the past, students have found the labs to be extremely beneficial. Also remember that the questions for the quizzes will come from the lab questions.

Academic Integrity and Artificial Intelligence Tools

At York, the Senate Academic Conduct Policy prohibits the undocumented or unreferenced use of GenAI by students, while further allowing instructors to restrict the use of GenAI tools. Note that by default, any documented use of GenAI is not a breach of academic integrity unless explicitly prohibited by the instructor.”

In this course, all assessments (including midterm examination, technical quiz, and final examination) and other submitted work (including responses to annual report questions and lab questions) must reflect **your own independent work**.

The use of **artificial intelligence (AI) programs, applications, or tools** (for example, ChatGPT or similar systems) is **strictly prohibited** in any form on assessments and submitted work.

This means you may not use AI to:

- Generate answers, explanations, responses, or solutions
- Draft or rewrite your work
- Check, edit, or “improve” your writing or responses
- Provide hints, outlines, or structure for your work

Simply put: **Do not use AI tools for assessments or submitted work in this course.**

GENERAL SCHULICH ACADEMIC POLICIES

Grading

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

Academic Honesty

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

Accommodations

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

Exams (Absence from)

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

Final
Students must contact their course instructor within 24 hours of missing a final examination. Students must also submit a completed Deferred Standing Request Form to Student & Enrolment Services within 48 hours. Student & Enrolment Services' email is **undergraduate@schulich.yorku.ca (mailto:undergraduate@schulich.yorku.ca)** . Student & Enrolment Services will notify the instructor and copy the student by email if appropriate documentation has been received.

Formal documentation* (e.g. **Attending Physician's Statement (https://registrar.yorku.ca/pdf/attending-physicians-statement.pdf)** , Counselor's Statement, death certificate, etc.) regarding the reason for missing the exam must be submitted electronically via file upload as part of the form.

The Deferred Standing Request form can be found at **https://schulich.yorku.ca/exam-deferral (https://schulich.yorku.ca/exam-deferral)** .

Visiting Campus

All York community members share in the responsibility of keeping others safe on campuses, and to uphold professional and respectful interactions with one another. In this class, as elsewhere on campus, students must comply with all University health and safety regulations or protocols, including the following:

- Do not attend in-person activities at any of York University's campuses/locations when you are feeling unwell. Please complete a self-assessment on YU Screen to receive support from a member of the University's case and contact management team.
- Wear a high quality, snugly fitting mask that completely covers the mouth, nose, and chin in all indoor spaces on campus
- Do not eat or drink in instructional spaces, including research and shared spaces (e.g., Libraries), unless for urgent health reasons.

More Information about COVID-19 health and safety measures can be found on the **Better Together (https://www.yorku.ca/bettertogether/)** website.

Encouraging a Community of Care

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

Student Rights and Responsibilities

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

The Schulich School of Business strongly supports and adheres to the **Code of Student Rights and Responsibilities (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)** . All students have rights and responsibilities as outlined in this document and are expected to uphold the identified values for the benefit of the entire community.

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

Take time to fully review the Code of Student Rights and Responsibilities: https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/ (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)

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

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

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

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

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Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Abu Rahaman, Accounting Area Representative on the BBA Committee
Date: November 3, 2025
Re: ACTG 4720 3.0 - Add a Blended Format of Course Delivery

Motion:

Faculty Council approves the proposal to add a blended format of course delivery for the following course in the BBA program: ACTG 4720 3.0, Advanced Income Taxation.

Rationale:

In Fall 2025 senior year accounting students' requested that the course delivery for this course be changed to blended, and in particular to deliver the technical component of the course online. In response, and with ADA permission, this course was delivered, with permission, in a blended format, to assess the impact. At the end of the semester, we obtained feedback from students and instructors, and all was overwhelmingly positive, as evidenced by the increase in class attendance that is now over 95% and there also was a consistency in course grades.

The blended teaching format facilitates course content being taught online as well as in the in-person depending upon the most appropriate mode of the content. Learning outcomes for this course have not been altered. What we have already learned is that some types of learning are better accommodated inperson and others online: For example, interactive learning that can include introduction of new material and case study discussions, appear to be better delivered in person; however, the technical accounting applications appear to be better absorbed by students through online sessions.

In conclusion, taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further evaluate how different types of content, formats, and techniques encourage students learning and engagement. Our request also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

Schulich
School of Business
York University

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   Schulich BBA Program

2. Responsible Unit:
   ACTG

3. Subject Code (Rubric) and Course Number:
   ACTG 4720

4. Credit Value:
   3.00

5. Long Course Title:
   Advanced Income Taxation

6. Short Course Title:
   Advanced Income Taxation

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

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

8. Effective Term/Calendar Year of Proposed Change(s):
   Winter 2027

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

   In Fall 2025 senior year accounting students' requested that the course delivery for this course be changed to blended, and in particular to deliver the technical component of the course online. In response, and with ADA permission, this course was delivered, with permission, in a blended format, to assess the impact. At the end of the semester, we obtained feedback from students and instructors, and all was overwhelmingly positive, as evidenced by the increase in class attendance that is now over 95% and there also was a consistency in course grades.

   The blended teaching format facilitates course content being taught online as well as in the in-person depending upon the most appropriate mode of the content. Learning outcomes for this course have not been altered. What we have already learned is that some types of learning are better accommodated in person and others online: For example, interactive learning that can include introduction of new material and case study discussions, appear to be better delivered in person; however, the technical accounting applications appear to be better absorbed by students through online sessions.

   In conclusion, taking the course forward in a blended format will allow us to provide the students with the best possible learning experience and to further evaluate how different types of content, formats, and techniques encourage students learning and engagement. Our request also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

Schulich
School of Business
York University

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):
Mode of delivery: in person	Mode of delivery: in-person, blended Changes to the course syllabus are reflected in the attached updated syllabus. Course title, description, and learning outcomes remain identical to the existing course information

11. Enrolment Notes:

n/a

12. Consultation:

n/a

Originator:

Signature	November 3, 2025 Date
Abu Rahaman Name	ACTG Area or Specialization

Approvals:

Area or Specialization

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

Signature	Nov 3, 2025 Date

Schulich
School of Business
York University

Linda Thorne	ACTG
Name	Area or Specialization

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA, iBBA Programs
Name of Program Director	Program

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

last updated: Feb 05 7:02pm EST.

Schulich School of Business

ACTG4720 W2025 CREDITS: 3.00

ACTG 4720 U - ADVANCED INCOME TAXATION

TUE 14:30 - 17:30 SSB N109

Lab Schedule

WED 17:30 - 19:00

COURSE DIRECTOR

Beppino Pasquali

bpasquali@schulich.yorku.ca

416.736.2100 Ext. 44610

S344D SSB

ADMIN

Dhaval Patel

pdhaval@schulich.yorku.ca

S353A SSB

The ACTG 4720 U lab will be conducted as virtual, synchronous meets. For more details, please refer to Canvas

BEPPINO PASQUALI - COURSE DIRECTOR

Beppino Pasquali is a Canadian Chartered Professional Accountant (FCPA, FCA) with 30 years of experience in accounting and taxation for small to medium sized companies. He advises clients in achieving growth and shareholder value. His considerable experience is evident in the seminar as he incorporates real life cases.

Beppino lectures in the Kellogg-Schulich EMBA, MBA and BBA programs in the field of financial and managerial accounting at the Schulich School of Business at York University in Toronto, Canada. He also lectures in the Kellogg-Recanati EMBA program in Tel Aviv, Israel. He also lectures on taxation, estate planning and investments for the Canadian Securities Institute. He authored “Personal Taxation Planning”, a Canadian taxation textbook, adopted by the Canadian Securities Institute.

Beppino has trained hundreds of sales and customer service representatives, managers, executives and professionals. His “Financial and Managerial Accounting for Non-Financial Manager” course is one of the most attended courses at the Executive Learning Centre at the Schulich School of Business at York University.

BEPPINO PASQUALI - INSTRUCTOR

Beppino Pasquali is a Canadian Chartered Professional Accountant (FCPA, FCA) with 30 years of experience in accounting and taxation for small to medium sized companies. He advises clients in achieving growth and shareholder value. His considerable experience is evident in the seminar as he incorporates real life cases.

Beppino lectures in the Kellogg-Schulich EMBA, MBA and BBA programs in the field of financial and managerial accounting at the Schulich School of Business at York University in Toronto, Canada. He also lectures in the Kellogg-Recanati EMBA program in Tel Aviv, Israel. He also lectures on taxation, estate planning and investments for the Canadian Securities Institute. He authored “Personal Taxation Planning”, a Canadian taxation textbook, adopted by the Canadian Securities Institute.

Beppino has trained hundreds of sales and customer service representatives, managers, executives and professionals. His "Financial and Managerial Accounting for Non-Financial Manager" course is one of the most attended courses at the Executive Learning Centre at the Schulich School of Business at York University.

BRIEF DESCRIPTION

A continuation of SB/ACTG 4710 3.00, this course concentrates in greater detail on the taxation of business income. Note: Not available to exchange students visiting Schulich. Open to Schulich undergraduate students with minimum Year 4 academic standing. Prerequisite: SB/ACTG 4710 3.00.

COURSE LEARNING OUTCOMES

This course serves as a continuation of the Introduction to Income Taxation course and expands on it by examining some of the more complicated sections of the Income Tax Act (ITA). It is designed to aid students to obtain in-depth knowledge of specific areas of the ITA and also further general understanding of the taxation system in Canada. The course will stress the use of the ITA to solve tax problems.

Those students who have taken their introductory tax course some time ago, or who feel they have not retained a sound understanding of basic taxation concepts, should review relevant segments of Chapters 1 to 12 of B, L & B during the first two weeks of the course.

COURSE MATERIAL

Required reading for this course includes the following books:

1. Nathalie Johnstone, Devan Mescall & Julie Robson, Introduction to Federal Income Taxation In Canada with Study Guide, 2023-2024, Wolters Kluwer.

2. Canadian Income Tax Act with Regulations, Annotated, Academic, 2024, Wolters Kluwer. ***THE INCOME TAX ACT MUST BE HARD COPY.***

The above books can be purchased from the York University bookstore as a bundle:

Package with text, study guide and income tax act

References:

1. Canada Revenue Agency (CRA), **www.cra.gc.caLinks to an external site. (http://www.cra.gc.ca/)**

2. Canada Tax Cases (CCH or Carswell), **www.canlii.caLinks to an external site. (http://www.canlii.ca/)**

3. W.J. Buckwold & J. Kitunen, *Canadian Income Taxation, Planning and Decision Making,* Latest Edition, McGraw-Hill Ryerson

4. Canadian Tax Foundation Publications

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Attendance at Labs 10% 1 lowest will be dropped			
Week 1 - Lab Attendance		2.5%	Wed Jan 8, 2025 at 07:00pm EST
Week 2 - Lab Attendance		2.5%	Wed Jan 15, 2025 at 07:00pm EST
Week 3 - Lab Attendance		2.5%	Wed Jan 22, 2025 at 07:00pm EST
Week 4 - Lab Attendance		2.5%	Wed Jan 29, 2025 at 07:00pm EST
Week 5 - Lab Attendance		2.5%	Wed Feb 5, 2025 at 07:00pm EST
Course Evaluation 1%			
Quiz 1 10%			
Quiz 1		10%	Tue Jan 28, 2025 at 03:30pm EST
Quiz 2 10%			
Quiz 2		10%	Tue Mar 11, 2025 at 03:30pm EDT
Quiz 3 10%			
Quiz 3		10%	Tue Mar 25, 2025 at 03:30pm EDT
Midterm examination 30%			
Midterm examination		30%	Tue Feb 11, 2025 at 02:30pm EST
Final examination 30%			
Final examination - TBA - Apr 7 - 13		30%	

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Week 1 - Lab Attendance

Due Date: Wed Jan 8, 2025 at 07:00pm EST

Week 2 - Lab Attendance

Due Date: Wed Jan 15, 2025 at 07:00pm EST

Week 3 - Lab Attendance

Due Date: Wed Jan 22, 2025 at 07:00pm EST

Week 4 - Lab Attendance

Due Date: Wed Jan 29, 2025 at 07:00pm EST

Week 5 - Lab Attendance

Due Date: Wed Feb 5, 2025 at 07:00pm EST

Quiz 1

Due Date: Tue Jan 28, 2025 at 03:30pm EST

There will be three quizzes during the term. The quizzes will be 60 minutes and will be done in the first hour of the lecture, as noted in the class schedule, below. Students will be given 60 minutes to prepare a response to the quiz. The quizzes will be closed book (except you can use the hardcopy version of the Income Tax Act) and done in class, using exam booklets. The Income Tax Act cannot have any notes on the pages or page inserts. The proctors will be examining your Income Tax Act during the quiz to ensure it conforms to this requirements.

The questions for the quizzes will be composed of questions that were assigned in the labs or very similar questions. The purpose of the Quiz is to ensure that the materials from the labs were understood by the student and will help you prepare for the mid-term and final exams.

If you miss the quiz due to documented medical reasons the mark will be allocated to the midterm or final exam, as applicable.

Quiz 2

Due Date: Tue Mar 11, 2025 at 03:30pm EDT

Details available Tue Mar 11, 2025 at 02:30pm EDT

Quiz 3

Due Date: Tue Mar 25, 2025 at 03:30pm EDT

Details available Tue Mar 25, 2025 at 02:30pm EDT

Midterm examination

Due Date: Tue Feb 11, 2025 at 02:30pm EST

Materials eligible for examinations include all assigned readings, handout material, lectures, class discussions and questions and labs.

The midterm exam will be 150 minutes and final exam exam will be 180 minutes. The exams will be closed book (except you can use the hardcopy version of the Income Tax Act) and done in class, using exam booklets. The Income Tax Act cannot have any notes on the pages or page inserts. The proctors will be examining your Income Tax Act during the quiz to ensure it conforms to this requirements.

If you miss the midterm exam due to documented medical reasons the mark will be allocated to the final exam.

Final examination - TBA - Apr 7 - 13

Materials eligible for examinations include all assigned readings, handout material, lectures, class discussions and questions and labs.

The midterm exam will be 150 minutes and final exam exam will be 180 minutes. The exams will be closed book (except you can use the hardcopy version of the Income Tax Act) and done in class, using exam booklets. The Income Tax Act cannot have any notes on the pages or page inserts. The proctors will be examining your Income Tax Act during the quiz to ensure it conforms to this requirements.

If you miss the midterm exam due to documented medical reasons the mark will be allocated to the final exam.

WRITTEN ASSIGNMENTS: EVALUATION

This course has assessments (i.e., quiz, midterm, final examination) that are expected to be completed live in-person within the classroom. All assessments will be completed in exam booklets.

There will be three quizzes, a midterm examination, and a final examination. 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
Lab Attendance	11	10x1%	10	Individual

Assignment/Task	Quantity	% Weight	Total %	Author
Quizzes	3	10 (each)	30	Individual
Midterm examination	1	30	30	Individual
Final examination	1	30	30	Individual
			100%	

If you miss the assignment due to documented medical reasons the mark will be allocated to the midterm or final exam, as applicable.

ACCOUNTING AREA POLICY FOR ASSESSMENTS:

Labs

There will be 11 labs for this course. The labs will be held on-line, using Zoom. The zoom link will be posted on Canvas at the beginning of the term. Attendance to the labs will be taken and 10% of your grade will be allocated to this. In order to obtain the full 10%, you will need to attend at least 10 out of the 11 labs (1% for each lab attended). It is important to complete the lab questions, as posted on Canvas, before the lab and be ready to take-up the solution and particiapte in discussions during the labs.

Quizzes

There will be three ***in-person*** quizzes during the term. The quizzes will be 60 minutes and will be done in the first hour of the lecture, as noted in the class schedule, below.

The questions for the quizzes will be composed of questions that were assigned in the labs or very similar questions. The purpose of the Quiz is to ensure that the materials from the course were understood by the student and will help you prepare for the mid-term and final exams.

If you miss the quiz due to documented medical reasons the mark will be allocated to the midterm or final exam, as applicable.

Exams

There will be a midterm and final exam during the term. The duration of the midterm exam will be 150 minutes and the final exam will be 180 minutes. Both assessments will be completed in person, as noted in the class schedule.

If you miss the midterm exam due to documented medical reasons the mark will be allocated to the final exam.

Materials eligible for examinations include all assigned readings, handout material, lectures, class discussions and questions, and quizzes.

CALCULATING COURSE GRADE

Grades

Expectations

Grades provide students with important feedback on their understanding of the course material, mastery of learning outcomes, and where they need to improve.

The guidelines below help ensure that grading practices are accurate, transparent, and consistent.

Process

A grade on a component (e.g., midterm) may be denoted as a percentage, grade-point, or letter.

If a grade is denoted as a percentage or letter, a student can determine their grade point by associating the percentage or letter with Schulich's 9-value index system discussed below.

For each graded component, a student will be informed of the class grade:

- breakdown (e.g., by range)
- average

At the end of the semester, grades for each component will be multiplied by the weighting of that specific component and summed to determine the total average grade which will be converted into a letter grade. The letter grade corresponds to Schulich's 9-value index system as discussed below.

GRADING SCHEME FOR ACTG 4720 T:

Schulich's 9-value index system for undergraduate students is as follows:

Grade	Grade Point / Index Value	Percent Range (Schulich guideline only)	Description
A+	9	90-100	Exceptional
A	8	80-89	Excellent
B+	7	75-79	Very Good
B	6	70-74	Good
C+	5	65-69	Competent
C	4	60-64	Fairly Competent
D+	3	55-59	Passing
D	2	50-54	Barely Passing
E	1	(marginally below 50%)	Marginally Failing
F	0	(below 50%)	Failing

GRADING SCHEME FOR ACTG 6720 F:

Schulich's 9-value index system for masters-level students is as follows:

Grade	Grade Point / Index Value	Percentage Points (guideline only)	Description
A+	9	90-100	Exceptional
A	8	85-89	Excellent
A-	7	80-84	Very Good
B+	6	75-79	Good
B	5	70-74	Competent
B-	4	65-69	Fairly Competent
C+	3	60-64	Passing
C	2	55-59	Barely Passing
C-	1	50-54	Marginally Failing
F	0	0-49%	Failing

GRADING SCHEME

CLASS-BY-CLASS SYLLABUS

Week 1

Jan 7/25

Overview: Class 1

Class Session: Week 1

Topic
- Overview of the course
- Non-arm's length transfers/attribution rules (p399-433 / Para 8,000-8,090)
- Replacement Property Rules (p382-386/Para 7,210-7,212)- just the concepts of the rules; detailed calculations are not required

Assigned Readings
- Review - JM&R – Ch 1 - 12

Jan 8/25

Overview: Lab Week 1

Lab 1 Questions:

Chapter 8 Assignment Problem 1

Chapter 8 Assignment Problem 3

Chapter 8 Assignment Problem 6

Week 2

Jan 14/25

Overview: Class 2

Class Session: Week 2

Topic
- Shareholder/manager remuneration
- Shareholder/Employee loans
- Salary vs Dividends-basics only as per lecture
- Unpaid amounts (p200-201/Para 4,520 and p738-740/Para13,012)
- Tax On Split Income (p784-797/Para 13,210-13278)

Assigned Readings
- JMR- Ch 13 P735-801Para 13,010-13,358- concentrate on the topics above

Jan 15/25

Overview: Lab Week 2

Lab 2 Questions

Chapter 13 Assignment Problem 5

Chapter 13 Assignment Problem 7

Week 3

Jan 21/25

Overview: Class 3

Class Session: Week 3

Topic
- Corporate distributions
- Paid-up capital, corporate surplus accounts, deemed dividends
- Winding-up of a Canadian corporation

Assigned Readings
- JM&R – Ch 16 p 909-955/Para 16,000-16,235

Jan 22/25

Overview: Lab Week 3

Lab 3 Questions

Chapter 16 Assignment Problem 2

Chapter 16 Assignment Problem 4

Week 4

Jan 28/25

Overview: Class 4

Class Session Week 4

Topic
- Purchase/sale of shares vs. assets
- Lifetime Capital Gains Exemption
- Acquisition of Control

Assigned Readings
- JMR – Ch 15
- JMR – Ch 16 p 955-972 /Para 16,300-16,340

Jan 29/25

Overview: Lab Week 4

Lab 4 Questions

Chapter 16 Assignment Problem 6 (ignore HST and sale of shares)

Chapter 16 Assignment Problem 7 (ignore HST and (D)-(F), sale of shares)

Week 5

Feb 4/25

Overview: Class 5

Class Session: Week 5

Topic
Section 85 – Transfer of property to a corporation

Assigned Readings
JMR – Ch 17 p 975-1023Para 17,000-17,090

Feb 5/25

Overview: Lab Week 5

Lab 5 Questions

Chapter 15 Assignment Problem 5- Sale of shares and Acquisition of Control Issues)

Revisit Chapter 16 Problem 6, for sale of shares issue (ignore purchase price on sale of shares)

Chapter 17 Assignment Problem 1- Subsection 85(1) Rollover review - MOVED TO LAB WEEK 7

Week 6 - MIDTERM EXAM

Midterm examination

CO-CURRICULAR DAYS FEB 15 - 21

Week 7

Feb 25/25

Overview: Class 7

Class Session: Week 7

Topic
Anti-avoidance provisions
s84.1, s55(2), s245 (GAAR)

Assigned Readings
JMR – Ch 17 p 1041-1051/Para 17,400-17,418-s84.1
JMR – Ch 17 p 1051-1053/ Para 17,420-17,422- s55
JMR – Ch 13 p 801-815Para 13,400-13,438-GAAR

Feb 26/25

Overview: Lab Week 7

Lab 7 Questions:

Chapter 17 Assignment Problem 1 Subsection 85(1) Rollover review

Chapter 17 Assignment Problem 6 (ignore HST)

Chapter 13 Assignment Problem 2

Week 8

Mar 4/25

Overview: Class 8

Class Session: Week 8

Topic
Other rollover provisions – s86, s85.1
Death of a Taxpayer
Estate planning and estate freezes

Assigned Readings
JMR – Ch 17 p 1023-1037/Para 17,100-17,200 and p 1037-1041/Para 17,300-17,340
JMR – Ch 19 p 1121-1143Para 19,210-19,260- Death of a Taxpayer

Mar 5/25

Overview: Lab Week 8

Lab 8 Questions:

Chapter 17 Assignment Problem 8 (do not worry about detailed calculations of PUC, etc- just discuss the tax implications)

Chapter 19 Assignment Problem 10

Week 9

Mar 11/25

Overview: Class 9

Class Session: Week 9

Topic
Amalgamations and windups – s87, s88
Loss utilization

Assigned Readings
JMR – Ch 17 p 1054-1060/Para 17,500-17,621
JMR—Ch 16 p 943-955Para 16,200-16,236

Mar 12/25

Overview: Lab Week 9

Lab 9 Questions:

Chapter 17 Assignment Problem 9

Week 10

Mar 18/25

Overview: Class 10

Class Session: Week 10

Topic
Partnerships and trusts

Assigned Readings
JMR – Ch 19 p1090-1121/Para 19,000-19,162

Mar 19/25

Overview: Lab Week 10

Lab 10 Questions:

Chapter 19 Assignment Problem 3

Chapter 19 Assignment Problem 5

Week 11

Mar 25/25

Overview: Class 11

Class Session: Week 11

Topic
Goods & Services Tax (GST) and Harmonized Sales Tax (HST)

Assigned Readings, Cases, etc.
JMR – Ch 21

Mar 26/25

Overview: Lab Week 11

Lab 11 Questions:

Chapter 21 Assignment Problem 12

Chapter 21 Assignment Problem 13

Week 12

Apr 1/25

Overview: Class 12

Class Session: Week 12

Topic
Rights and obligations under the Income Tax Act

Assigned Readings
JMR – Ch 14

Apr 2/25

Overview: Lab Week 12

Lab 12 Questions:

Chapter 14 Assignment Problem 5

Chapter 14 Assignment Problem 6

Final Exam

Final examination - TBA - Apr 7 - 13

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

This course covers a substantial amount of complex tax law in a short period of time. Accordingly, students taking this course will be expected to carry a heavy workload and should plan to spend at least 12 hours per week reading and preparing the quizzes. (This estimate does not include time spent in lectures.) In addition to assigned readings, students will be expected to read and understand the relevant provisions of the ITA.

It is extremely important for students to do the assigned readings and review the relevant provisions of the ITA in advance of the lecture. Students should bring the ITA to class.

The classroom sessions will consist primarily of lectures with the balance of time spent problem solving and clarifying reading material.

GENERAL SCHULICH ACADEMIC POLICIES

Grading

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

Academic Honesty

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

Accommodations

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

Exams (Absence from)

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

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

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

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

Visiting Campus

All York community members share in the responsibility of keeping others safe on campuses, and to uphold

professional and respectful interactions with one another. In this class, as elsewhere on campus, students must comply with all University health and safety regulations or protocols, including the following:

- Do not attend in-person activities at any of York University's campuses/locations when you are feeling unwell. Please complete a self-assessment on YU Screen to receive support from a member of the University's case and contact management team.
- Wear a high quality, snugly fitting mask that completely covers the mouth, nose, and chin in all indoor spaces on campus
- Do not eat or drink in instructional spaces, including research and shared spaces (e.g., Libraries), unless for urgent health reasons.

More Information about COVID-19 health and safety measures can be found on the **Better Together (https://www.yorku.ca/bettertogether/)** website.

Encouraging a Community of Care

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

Student Rights and Responsibilities

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

The Schulich School of Business strongly supports and adheres to the **Code of Student Rights and Responsibilities (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)** . All students have rights and responsibilities as outlined in this document and are expected to uphold the identified values for the benefit of the entire community.

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

Take time to fully review the Code of Student Rights and Responsibilities: https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/ (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)

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

Deliverables

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

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

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

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

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Farrokh Zandi
Date: October 21, 2025
Re: Removing SB/ECON 3510 3.00– Applied International Economics- as a pre/co-requisite for SB/GBUS 3200 3.00 – Managing Global Business Activities.

Motion:
That Faculty Council approve the removal of SB/ECON 3510 3.00– Applied International Economics as a pre/co-requisite for SB/GBUS 3200 3.00 – Managing Global Business Activities.

Rationale:
Earlier in 2025, the Certificate in International Management (CIM) program was revised to improve accessibility by limiting the number of required courses to three, including SB/GBUS 3200 3.00. SB/ECON 3510 3.00 is included as an elective in the CIM program.

However, SB/ECON 3510 3.00 is a prerequisite for GBUS 3200, one of the three required CIM courses. This effectively adds an unintended, fourth course requirement to the CIM. Therefore, SB/ECON 3510 3.00 should be removed as the pre/co-requisite of for SB/GBUS 3200 3.00.

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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:
   BBA Program

2. Responsible Unit:
   Global Business

3. Subject Code (Rubric) and Course Number:
   SB/GBUS 3200 3.00

4. Credit Value:
   3.00

5. Long Course Title:
   Managing Global Business Activities

6. Short Course Title:
   Managing Global Business Activities

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

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

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York University

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

9. Rationale:

Earlier in 2025, the Certificate in International Management (CIM) program was revised to improve accessibility by limiting the number of required courses to three, including SB/GBUS 3200 3.00. SB/ECON 3510 3.00 is included as an elective in the CIM program.

However, SB/ECON 3510 3.00 is a prerequisite for GBUS 3200, one of the three required CIM courses. This effectively adds an unintended, fourth course requirement to the CIM. Therefore, SB/ECON 3510 3.00 should be removed as the pre/co-requisite of for SB/GBUS 3200 3.00.

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)
Current Calendar Description This course focuses on how to deal with the issues affecting the success of organizations operating internationally through exporting, importing, licensing or engaging in foreign direct investment. Role-playing, and development of an international business plan will be utilized in generating the skills and mind-set required for dealing with real-life international business situations. Prerequisites or corequisites: BBA students must also take SB/ECON 3510 3.00 either as a corequisite or as a prerequisite for this course. Course Credit Exclusion: SB/IBUS 3200 3.00 Note: Open to Schulich undergraduate students with a minimum of year 3 academic standing. The course is required for the Schulich Certificate in International Management, but students do not have to enrol in the Certificate to take the course.	Proposed Calendar Description This course focuses on how to deal with the issues affecting the success of organizations operating internationally through exporting, importing, licensing or engaging in foreign direct investment. Role-playing, and development of an international business plan will be utilized in generating the skills and mind-set required for dealing with real-life international business situations. ~~Prerequisites or corequisites: BBA students must also take SB/ECON 3510 3.00 either as a corequisite or as a prerequisite for this course.~~ Course Credit Exclusion: SB/IBUS 3200 3.00 Note: Open to Schulich undergraduate students with a minimum of year 3 academic standing. The course is required for the Schulich Certificate in International Management, but students do not have to enrol in the Certificate to take the course.

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11. Enrolment Notes:
N/A

12. Consultation:

N/A

Originator:

Farrokh Zandi	October 21, 2025
Signature	Date
Farrokh Zandi	Global Business/ECON
Name	Area or Specialization

Approvals:

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

Farrokh Zandi	October 21, 2025
Signature	Date
Farrokh Zandi	Global Business/ECON
Name	Area or Specialization

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA, iBBA Programs
Name of Program Director	Program

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business

From: Ruodan Shao, Area Coordinator, ORGS

Date: October 22, 2025

Re: ORGS 4600 3.00 – Course Title and Pre-requisite changes

Motion:

That Faculty Council approves the changes to the SB/ORGS 4600 3.00 course title and pre-requisites.

Rationale:

The pre-requisite wording has been revised to make it clearer which courses are required for BBA and iBBA students. The course title has been updated to more accurately describe its content and focus.

Schulich
School of Business
York University

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
   BBA, iBBA Program

2. Responsible Unit:
   ORGS

3. Subject Code (Rubric) and Course Number:
   ORGS 4600

4. Credit Value:
   3.00

5. Long Course Title:
   Diversity and Inclusion in Organizations

6. Short Course Title:
   Diversity and Inclusion in Organizations

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)
X	in pre/co-requisite
	retire course
	other (please specify)

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

Schulich
School of Business
York University

Fall 2026

9. Rationale:
The pre-requisite wording has been revised to make it clearer which courses are required for BBA and iBBA students. The course title has been updated to more accurately describe its content and focus.

10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
Title ~~Diversity and Inclusion in Organizations~~ Calendar Description This course examines diversity (broadly defined to include culture, gender, race, sexual orientation, ability, etc.,) and how organizations leverage opportunities of diversity and also navigate challenges that diversity can bring if mismanaged. Students have the opportunity to critically reflect on topics such as employee identity, maintaining business relationships across difference, the business case for diversity, and supporting organizational goals through inclusion. Prerequisites: SB/ORGS 2100 3.00, SB/ORGS 2200 3.00 ~~and~~ SB/INTL 2300 3.00	Proposed Title Diversity, Equity and Inclusion Revised Calendar Description This course examines diversity (broadly defined to include culture, gender, race, sexual orientation, ability, etc.,) and how organizations leverage opportunities of diversity and also navigate challenges that diversity can bring if mismanaged. Students have the opportunity to critically reflect on topics such as employee identity, maintaining business relationships across difference, the business case for diversity, and supporting organizational goals through inclusion. Prerequisites: SB/ORGS 2100 3.00 and SB/ORGS 2200 3.00 or SB/INTL 2300 3.00 Note: Open to Schulich undergraduate students with minimum year 3 academic standing.

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

11. Enrolment Notes:
n/a

12. Consultation:
n/a

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Originator:

Ruodan Shao	October 24, 2025
Signature	Date
Ruodan Shao	ORGS
Name	Area or Specialization

Approvals:

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

Ruodan Shao	October 24, 2025
Signature	Date
Ruodan Shao	ORGS
Name	Area or Specialization

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA,iBBA Programs
Name of Program Director	Program

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

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York University

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

last updated: Oct 23 2:10am EDT.

Schulich School of Business

ORGS4600 F2025 **CREDITS: 3.00**

ORGS 4600 A - DIVERSITY, EQUITY AND INCLUSION

WED 11:30-14:20 SSB E118

Office Hours

By appointment

COURSE DIRECTOR

Brent Lyons

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416.736.2100 Ext. 55096

N303A SSB

ADMIN

Carla D'Agostino

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BRENT LYONS - INSTRUCTOR

Brent Lyons (he/him) is an Associate Professor of Organization Studies at the Schulich School of Business. His research involves the study of stigma in organizations and how individuals with stigmatized social identities, such as disabled employees and sexual minority employees, navigate their work and interpersonal relationships to reduce consequences of stigmatization. Brent is passionate about teaching diversity & inclusion, and inspiring students to feel a similar level of passion. Brent feels that learning about diversity & inclusion best occurs through dialogue between students and instructors, and Brent is committed to creating a safe environment where everyone feels comfortable sharing their points of view. Brent has taught organizational behaviour courses at the MBA, PhD, EMBA, and BBA levels over the past 15 years, and he has also consulted for several organizations and brings those examples into his teaching. Brent is excited to experience ORGS 4600 with you.

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

BRIEF DESCRIPTION

This course examines diversity (broadly defined to include culture, gender, race, sexual orientation, ability, etc.,) and how organizations leverage opportunities of diversity and also navigate challenges that diversity can bring if mismanaged. Students have the opportunity to critically reflect on topics such as employee identity, maintaining business relationships across difference, the business case for diversity, and supporting organizational goals through inclusion.
Prerequisites: SB/ORGS 2100 3.00 and SB/ORGS 2200 3.00 or SB/INTL 2300 3.00
Note: Open to Schulich undergraduate students with minimum year 3 academic standing.

COURSE LEARNING OUTCOMES

The main goals of this course are to:

(a) reflect on aspects of personal identity that shape employee's experiences

(b) explain how privilege and bias influence organizational effectiveness,

(c) describe how to craft more effective relationships in diverse organizations,

(d) describe current diversity and inclusion practices in organizations, and

(e) propose ways to enhance inclusion based on course content after analyzing an organization's current approach to leading diversity and inclusion.

COURSE MATERIAL

There will be no textbook for this course. You are expected to come to each class having completed the required readings.

Canvas

The Professor will post weekly readings to Canvas.

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Quizzes 30%			
Quiz # 1		15%	Wed Oct 8, 2025 at 11:30am EDT
Quiz 2		15%	Wed Nov 19, 2025 at 11:30am EST
Personal Reflection – Paper 15%			
Personal Reflection – Paper		15%	Wed Oct 22, 2025 at 11:30am EDT
Personal Reflection – Presentation 5%			
Personal Reflection – Presentation		5%	Wed Oct 22, 2025 at 11:30am EDT
Group Project – Paper 25%			
Group Project – Paper		25%	Wed Nov 26, 2025 at 11:59pm EST
Group Project – Presentation 15%			
Group Project – Presentation		15%	Wed Nov 26, 2025 at 11:30am EST
Course Contribution 10%			
Course Contribution		10%	

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Quiz # 1

Due Date: Wed Oct 8, 2025 at 11:30am EDT

Quiz 1 will occur in-person during regular class time. It will contain 35 multiple choice questions. You will be tested on material covering classes 1 through 5.

Quiz 2

Due Date: Wed Nov 19, 2025 at 11:30am EST

Quiz 2 will occur in-person during regular class time. It will contain 35 multiple choice questions. You will be tested on material covering classes 1 through 10 with an emphasis on material covered in classes 8, 9, and 10.

Personal Reflection – Paper

Due Date: Wed Oct 22, 2025 at 11:30am EDT

You will write a five-page paper (double-spaced, 12-pt font) about how your identities (multiple and intersecting) shape your personal story and how your story can facilitate achieving your career goals.

In this assignment you will examine your life story—with emphasis on the influences of your identities. Crafting a personal story around your identities is an essential skill to achieve desired outcomes in organizations (e.g., applying for a job; interviewing for a position). You are encouraged to keep track of your thoughts/ideas about yourself over the semester to help craft your story as we discuss topics such as "Authenticity" and the "Identity Management." Your paper will be treated with the utmost confidence and will not be shared with anyone else in the class.

Grading rubric: **Rubric Personal Reflection Paper.pdf**

You will submit a copy of the paper to turnitin before the end of day on Nov 5 (11:59 pm EST).

Personal Reflection – Presentation

Due Date: Wed Oct 22, 2025 at 11:30am EDT

In a group of (randomly assigned) 4-5 students, you will present key points from your personal reflection in a 5-10 minute presentation. Your presentation will be peer-evaluated.

Grading rubric: **Rubric Personal Reflection Presentation.pdf**

Grading of the presentation will be based on the following:

1. Presentation skills (e.g. eye contact, hand gestures, voice, effective use of visual aids)
2. Integration of course concepts
3. Creativity/Originality
4. Effective use of visual aids

Group Project – Paper

Due Date: Wed Nov 26, 2025 at 11:59pm EST

You will have a comprehensive team project during the semester. The group project is designed to test you on your ability to apply course concepts to develop a practical inclusion intervention for a real business. Groups of (randomly assigned) 4-5 students will draw on course concepts and design an intervention for a familiar organization (company assigned). The report should include an analysis of the organization's purpose, environment, mission, vision, values, goals, strategy, demographic composition, culture, diversity issue to be addressed by the intervention, and a description of the intervention. You must integrate multiple concepts covered in class and demonstrate an in-depth understanding of those concepts. Your intervention must be practical and realistic.

In addition to class and text materials, groups may also use newspaper and media articles, surveys or interviews conducted by the team or other materials relevant to understanding the organization and the appropriateness of your inclusion intervention.

The written report is meant to provide an overview of your analysis and intervention and must be no more than 3000 words. You should reference all sources. Appendices may be added if relevant (not included in the word count). Note that your written report needs to stand-alone and provide a complete discussion of your analysis and intervention.

See grading rubric for evaluation criteria: **Rubric Group Project Paper.pdf**

Group Project – Presentation

Due Date: Wed Nov 26, 2025 at 11:30am EST

Group Projection Presentation:

You will present your analysis and intervention plan in a 10-minute presentation during class.

Grading of the presentation will be based on the following:

1. Presentation skills (e.g. eye contact, hand gestures, voice, effective use of visual aids)
2. Integration of course concepts
3. Relevance of analysis
4. Practicality of intervention
5. Creativity/Originality
6. Effective use of visual aids

Course Contribution

Course contribution will be determined based on your **participation in class meetings**. Course Contribution is worth 10% toward your final grade.

Class Meetings (10%)

Each week during our scheduled class time, your participation will be evaluated based on the grading scheme below. In class we will discuss the weekly course concepts, the assigned case readings, and participate in activities together. During this meeting time you will have a chance to participate by engaging in class discussion, activities, or asking questions. You will receive a participation grade for each class meeting based on the following scale: -1, 0, 1, and 2.

- -1 = You are disrespectful, your comments are irrelevant to the topic or are distracting, or take away from the gist of the meeting.
- 0 = You do not attend the meeting.
- 1 = You attend the meeting.
- 2 = Your comments show that you have thought about the course material in a thoughtful way. You participate in meeting activities.

At the end of the course, I will sum the your points and rank the class by these totals. I use these scores as the first cut to assign grades based on my judgment of how good the top-scoring student is, how poor the lowest-scoring student is, where I should make grade breaks between the extremes, and individual strengths, weaknesses, and trends.

Halfway through the course I will provide all students with individual feedback on their course contribution with a specific point score and how that score compares with the rest of the class.

You will only receive a contribution grade for **8 of the 10 weekly classes** (not including weeks when no class is scheduled). That is, your course contribution grade will be based on your highest 8 grades of the 10 weeks OR 8 weeks if you choose to not participate for 2 weeks.

WRITTEN ASSIGNMENTS: EVALUATION

Evaluation will accommodate diverse learning styles in support of demonstrated student progress as a self-directed learner and reflective practitioner. All students will be required to do a combination of each: readings, individual and group projects. However, the weight attributed to each assigned task may be adjusted to student preference. Please note that no assignment can be less than 5% or more than 40% of the total course grade.

WARNING: Using generative AI

The instructor understands that large language models (LLMs) like ChatGPT by Open AI are widely available and represent an opportunity to get going. However, please note that the **unauthorized** use of ChatGPT (or other generative AI tools) on assessments is a breach of academic honesty and will be considered cheating.

In this course, you may use generative AI as a starting point. However, you will need to provide the link for the tool used, the prompt entered and the generated response all as an appendix to your work.

Otherwise, it will be treated as a breach of academic honesty.

OpenAI CEO Sam Altman is reported as saying: “It’s a mistake to be relying on [ChatGPT] for anything important right now”. Your education is too important to be short-circuited by using an LLM to do your homework.

CALCULATING COURSE GRADE

In this course, final course grades will be determined by the following process: All assignments and projects will be marked using the letter grades from A+ through F. To calculate the final grade, letter grades for each assignment will be translated into grade points using the conversion scheme detailed below. These are then added using the percentage weight of each assignment and rounded up or down to the nearest full grade point, which is finally translated back into the corresponding letter grade.

GRADING SCHEME

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

CLASS-BY-CLASS SYLLABUS

Welcome & Introduction

- Welcome & Introduction
- AI Use Policy

Week 1 - Introduction to Diversity - Why Diversity Matters

Sep 3/25

Overview: Introduction to Diversity - Why Diversity Matters

Class Session

Class 1

Topic: Introduction to Diversity

This week, we'll introduce the concept of diversity that will guide us through the subsequent 11 classes. We'll begin by discussing why diversity matters, and the challenges faced by organizations in harnessing the benefits of diversity, including exclusion, inequality, inter-group stereotypes and bias. In-class activities will cover an ice-breaker, inter-group stereotypes and bias.

Assigned Reading

McKinsey & Company (2023). Diversity matters even more: The case for holistic impact.

Retrieve from: **https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diversity-matters-even-more-the-case-for-holistic-impact (https://www.mckinsey.com/featured-insights/diversity-and-inclusion/diversity-matters-even-more-the-case-for-holistic-impact)**

Chhaya, N. (2020). Why diversity and inclusion efforts fail to deliver and how to change that. *Forbes*.

Retrieve from: **https://www.forbes.com/sites/niharchhaya/2020/06/29/why-diversity-and-inclusion-efforts-fail-to-deliver-and-how-to-change-that/#7a511d2657be (https://www.forbes.com/sites/niharchhaya/2020/06/29/why-diversity-and-inclusion-efforts-fail-to-deliver-and-how-to-change-that/#7a511d2657be)**

Assigned Activities

Complete the "Race" Implicit Bias Test before our first class meeting.

https://implicit.harvard.edu/implicit/canada/takeatest.html (https://implicit.harvard.edu/implicit/canada/takeatest.html)

Week 2 - Identity, Authenticity, & the "Ideal"Worker

Sep 10/25

Overview: Identity, Authenticity, and the "Ideal" Worker

Class Session

Class 2

Topic: Identity, Authenticity, and the "Ideal" Worker

In this second week, we begin our focus on individual employees' experience of identity. We'll discuss identity and authenticity in relation to diversity and the pros and cons of bringing one's whole self to work for individuals and organizations. We'll reflect on personal experiences with diversity and opportunities and challenges to being authentic in organizations, especially in work contexts where individuals might be exhibited to be a prototypical "ideal" worker. In-class activities will cover how diversity of one's personal and professional networks relates to experiences of authenticity at work.

Assigned Readings

1. Eyl, E. (2014). Apple CEO Tim Cook on bringing your whole self to work. *LinkedIn*.

   Retrieve from: **https://www.linkedin.com/pulse/20141110152407-4647240-apple-ceo-tim-cook-on-bringing-your-whole-self-to-work/ (https://www.linkedin.com/pulse/20141110152407-4647240-apple-ceo-tim-cook-on-bringing-your-whole-self-to-work/)**

2. Hills, J. (2019). Workplace culture: Why it's time to bust the myth of the ideal worker.

Retrieve from: **https://hrzone.com/workplace-culture-why-its-time-to-bust-the-myth-of-the-ideal-worker/ (https://hrzone.com/workplace-culture-why-its-time-to-bust-the-myth-of-the-ideal-worker/)**

3. Leiva, L. (2018). Be your authentic self at work-but only if you're White.

Retrieve from: **h (https://blavity.com/dont-bring-whole-self-work) https://www.refinery29.com/en-us/how-to-be-authentic-self-at-work-people-of-color (https://www.refinery29.com/en-us/how-to-be-authentic-self-at-work-people-of-color) (https://blavity.com/dont-bring-whole-self-work)**

4. Phillips, K. W., Dumas, T. L., & Rothbard, N. P. (2018). Diversity and Authenticity. *Harvard Business Review*, *96*(2), 132–136.

Retrieve from: **http://researchguides.library.yorku.ca/HBR (http://researchguides.library.yorku.ca/HBR)**

Assigned Activities:

1. First, complete the "Who Am I?" activity before our class meeting. Access the activity here: **Who am I venn diagram.docx**
2. Second, complete the "Social Identity Profile" activity before our class meeting. Access the activity here: **Social Identity Profile.docx**

Week 3 - Stigma & Identity Management

Sep 17/25

Overview: Stigma & Identity Management

Class Session

Class 3

Topic: Stigma & Identity Management

In our third week, we'll examine stigma and the way it manifests in organizations. We will also examine the strategies that individuals adopt to navigate stigma and achieve career goals. We'll discuss how identity relates to such strategies and in particular we'll focus on identity management tactics. In-class activities will cover identity management choices and personal reflection on our own tactics for achieving career success.

Assigned Reading

Kang, S.K., DeCelles, K.A., Tilcsik, A., & Jun, S. (2016). Whitened resumes: Race and self- presentation in the labor market. Administrative Science Quarterly, 61, 469-502. **Kang et al 2016.pdf**

Pescosolido, B.A. & J.K. Martin. (2015). The Stigma Complex. Annual Review of Sociology 41: 87-116. **Prescosolido 2015.pdf**

Assigned Activities

Bring the "Social Identity Impression Management" (SIIM) with you to our class meeting. You can find the activity here: **SIIM activity.docx**

You do not need to read the following article before class, but our in-class activity will be based on the following reading:

Roberts, L.M., Cha, S.E., & Kim, S.S. (2014). Strategies for managing impressions of racial identity in the workplace. *Cultural Diversity and Ethnic Minority Psychology*, 20, 529-540. **Robertsetal2014 -- racial based IM strategies (1).pdf**

Week 4 - Identity Complexity, Multiple Identities, & Intersectionality

Sep 24/25

Overview: Identity Complexity, Multiple Identities, and Intersectionality

Class Session

Class 4

Topic: Identity Complexity, Multiple Identities, and Intersectionality

This week, we'll complicate our focus on identity and examine how people have multiple and overlapping identities that contribute to their experiences of exclusion and inequality in organizations. We'll discuss intersectionality and the limitations of considering identities in isolation and the benefits of considering identities as multiple and overlapping. We will also consider limitations of an intersectional approach. In-class activities will cover how personal narratives can be informative of the complex ways in which identity impacts employees' experiences of exclusion and inequality.

Assigned Reading

Atewologun, D. (2018). *Intersectionality theory and practice. Oxford Research Encyclopedia of Business and Management.* **Atewologun 2018 intersectionality.pdf**

For Atewologun (2018), you are responsible for reading only the following pages:

Pages 3-4: "What is intersectionality?"
Pages 11-12: "Intersectionality as Management Praxis"
Pages 13-15: "Future Considerations for Intersectionality Theory and Practice"

Collins, P. H., & Bilge, S. (2016). What is intersectionality? In Collins, P.H., & Bilge, S. (Eds.), *Intersectionality,* (pp. 1-30). Cambridge, UK: Polity. **Collins & Bilge 2016.pdf**

Assigned Activity

Before our class meeting, watch the Ted Talk:"Kimberle Crenshaw:The urgency of intersectionality"

https://www.ted.com/talks/kimberle_crenshaw_the_urgency_of_intersectionality?language=en#t-1115038 (https://www.ted.com/talks/kimberle_crenshaw_the_urgency_of_intersectionality?language=en)

Week 5 - Positive Relationships Across Difference & Allyship

Oct 1/25

Overview: Positive Relationships Across Difference & Allyship

Class Session

Class 5

Topic: Positive Relationships Across Difference & Allyship

We now move from our focus on individuals to relationships in organizations. We'll discuss the nature of relationships across social group differences and how employees' memberships to majority and minority social groups impact relationship development. We will discuss privilege and identity threat as hurdles to relationship development and, more positively, we'll also discuss how allyship develops in relationships. We'll do an activity that involves reflection on majority group privilege and allyship.

Assigned Readings

1. Roberts, L. M., (2007). From proving to becoming: How positive relationships create a context for self-discovery and self-actualization. In J. Dutton and B. Rose Ragins (Eds.), *Exploring Positive Relationships at Work: Building a Theoretical and Research Foundation*. Lawrence Erlbaum Associates. **Roberts 2007.pdf**

2. Collins, C., (2018). What is white privilege, really? **https://www.learningforjustice.org/magazine/fall-2018/what-is-white-privilege-really (https://www.learningforjustice.org/magazine/fall-2018/what-is-white-privilege-really)**

3. Luthra, P. (2022). 7 ways to practice effective allyship. Harvard Business Review. **Luthra 2022.pdf**

Assigned Activity

Before our class meeting, watch the TED talk "Dolly Chugh on being 'good-ish'"

https://www.ted.com/talks/dolly_chugh_how_to_let_go_of_being_a_good_person_and_become_a_bet language=en (https://www.ted.com/talks/dolly_chugh_how_to_let_go_of_being_a_good_person_and_become_a_better_person language=en)

Week 6 - Quiz #1

Quiz # 1

Week 7 - Personal Reflection Assignment

Oct 22/25

Overview: Personal Reflection Assignment

Class Session

Class 7

Topic: Personal Reflection Assignment

Week 8 - Paradigms for Engaging with a Diverse Workforce

Oct 29/25

Overview: Paradigms for Engaging with a Diverse Workforce

Class Session

Class 8

Topic: Paradigms for Engaging with a Diverse Workforce

Now we move from our focus on individuals and relationships to organizational approaches to diversity. We'll discuss various approaches, or paradigms, to framing how managers can think about diversity. We will discuss the business case for diversity, including a discussion of diversity management and the impact of diversity management on organization financial performance. We will also discuss the moral case for diversity and contrast that with the business case. We will also discuss the pros and cons of each paradigm in regard to employee authenticity, exclusion, inequality, and organizational effectiveness.

Assigned Reading

Linnehan, F.L. & Konrad, A. (1999). Diluting diversity: Implications for intergroup inequality in organizations. *Journal of Management Inquiry,* 4, 399-414.

http://ezproxy.library.yorku.ca/login?url=http://resolver.scholarsportal.info/resolve/10564926/v08i0004/399_dd.xml (http://ezproxy.library.yorku.ca/login?url=http://resolver.scholarsportal.info/resolve/10564926/v08i0004/399_dd.xml)

Ely, R. & Thomas, D. (2020). Getting serious about diversity: Enough already with the "business case". *Harvard Business Review*. **Ely & Thomas 2020.pdf**

Georgac, O. & Rattan, A. (2022). Making the 'business case for diversity' can backfire with underrepresented groups. *Yale Insights*.

https://insights.som.yale.edu/insights/making-the-business-case-for-diversity-can-backfire-with-underrepresented-groups

Week 9 - Inclusion Interventions & Navigating Backlash

Week 10 - Decolonizing DEI

Class 11 - Quiz # 2

Quiz 2

Class 12 - Group Project Due

Group Project – Paper

Group Project – Presentation

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

Students are expected to complete all readings and view any other assigned media prior to class. It helps to possess a high-level awareness of current affairs. Each student should be prepared to share their learnings and questions in class.

Class Participation (contribution)

There are no grades for class participation. However, like doing the readings, participation in class is a critical way to test one's understanding of course material. It also affords the opportunity to deepen the classroom experience for everyone. As guidance, note that a quality contribution to a class discussion brings together the following elements. The contribution is:

- Relevant to the topic at hand.
- Engage with what has been said before.
- Demonstrates acquaintance with course work.
- Inclusive and acknowledging diversity.
- Situated in the context of current events and trends.

- Advances the discussion.

The course provides opportunities to engage in conversations that some find uncomfortable. To maintain an environment that is safe for everyone, please note that there are attitudes to avoid at all costs. A quality contribution is never: rude, flippant, judgmental, belittling, dismissive, intolerant, and condescending. If the instructor or another participant makes a misstep but when made aware of it immediately seeks to redress the situation, we agree in advance to define this behaviour as "unintentional" and to embrace it as a learning opportunity for everyone.

GENERAL SCHULICH ACADEMIC POLICIES

Grading

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

Academic Honesty

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

Accommodations

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

Exams (Absence from)

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

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

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

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

Visiting Campus

All York community members share in the responsibility of keeping others safe on campuses, and to uphold professional and respectful interactions with one another. In this class, as elsewhere on campus, students must comply with all University health and safety regulations or protocols, including the following:

- Do not attend in-person activities at any of York University's campuses/locations when you are feeling unwell. Please complete a self-assessment on YU Screen to receive support from a member of the University's case and contact management team.
- Wear a high quality, snugly fitting mask that completely covers the mouth, nose, and chin in all indoor spaces on campus
- Do not eat or drink in instructional spaces, including research and shared spaces (e.g., Libraries), unless for urgent health reasons.

More Information about COVID-19 health and safety measures can be found on the **Better Together (https://www.yorku.ca/bettertogether/)** website.

Encouraging a Community of Care

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

Student Rights and Responsibilities

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

The Schulich School of Business strongly supports and adheres to the **Code of Student Rights and Responsibilities (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)** . All students have rights and responsibilities as outlined in this document and are expected to uphold the identified values for the benefit of the entire community.

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

Take time to fully review the Code of Student Rights and Responsibilities:
https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/ (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)

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

These course materials are designed for use as part of this course at York University and are the property of the instructor unless otherwise stated. Third party copyrighted materials (such as

book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law.

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

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Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business

From: Preet Aulakh, Area Coordinator, SGMT

Date: October 22, 2025

Re: SGMT 4300 3.00 – Pre-requisite addition

Motion:

That Faculty Council approves the addition of SB/SGMT 3000 3.00 as a pre-requisite for SGB/SGMT 4300 3.00

Rationale:

SB/INTL 3000 3.00 and SB/SGMT 3000 3.00 provide students with the strategic management foundation for SB/SGMT 4300 3.00. SB/INTL 3000 3.00 fulfills the requirement for iBBA students and SB/SGMT 3000 3.00 for BBA students. While SB/INTL 3000 3.00 is currently listed as a pre-requisite for iBBA students, the BBA equivalent, SB/SGMT 3000 3.00 is missing. These proposed changes will correct this omission.

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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:
   BBA, iBBA Program

2. Responsible Unit:
   SGMT

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

4. Credit Value:
   3.00

5. Long Course Title:
   Strategic Thinking Skills

6. Short Course Title:
   Strategic Thinking Skills.

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

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

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

9. Rationale:
SB/INTL 3000 3.00 and SB/SGMT 3000 3.00 provide students with the strategic management foundation for SB/SGMT 4300 3.00. SB/INTL 3000 3.00 fulfills the requirement for iBBA students and SB/SGMT 3000 3.00 for BBA students. While SB/INTL 3000 3.00 is currently listed for iBBA students, the BBA equivalent, SB/SGMT 3000 3.00 is missing. These proposed changes will correct this omission.

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):
Current Calendar Description This course combines the necessary strategic and analytical thinking skills for effective management. This course is about identifying, analyzing and articulating the key issues that impact organizations and applying the appropriate frameworks that can assist managers in reaching better decisions. Students use the frameworks and strategic analysis tools developed in SB/SGMT 3000 3.00 and systematically apply them to real-life business situations. Previously offered as: SB/SGMT 3300 3.00. Prerequisite: SB/INTL 3000 3.00 (Previously offered as SB/INTL 4400 3.00). Note: Open to Schulich undergraduate students with minimum year 3 academic standing.	Proposed Calendar Description This course combines the necessary strategic and analytical thinking skills for effective management. This course is about identifying, analyzing and articulating the key issues that impact organizations and applying the appropriate frameworks that can assist managers in reaching better decisions. Students use the frameworks and strategic analysis tools developed in SB/SGMT 3000 3.00 or SB/INTL 3000 3.00 and systematically apply them to real-life business situations. Previously offered as: SB/SGMT 3300 3.00. Prerequisite: SB/SGMT 3000 3.00 or SB/INTL 3000 3.00 (Previously offered as SB/INTL 4400 3.00). Note: Open to Schulich undergraduate students with minimum year 3 academic standing.

9. Enrolment Notes:
n/a

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10. Consultation:
n/a

Originator:

Preet Aulakh	October 20, 2025
Signature	Date
Preet Aulakh	SGMT
Name	Area or Specialization

Approvals:

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

Preet Aulakh	October 20, 2025
Signature	Date
Preet Aulakh	SGMT
Name	Area or Specialization

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA,iBBA Programs
Name of Program Director	Program

Program Committee:

Schulich
School of Business
York University

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

Burkard Eberlein	Nov. 7, 2025
Signature	Date
Burkard Eberlein	BBA/iBBA Program Committee
Name of Committee Chair	Committee

last updated: Mar 27 2:03pm EDT.

Schulich School of Business

SGMT4300 W2026 **CREDITS: 3.00**

SGMT 4300 R - STRATEGIC THINKING SKILLS

THU 14:30-17:30 SSB E112

COURSE DIRECTOR

Zdenek Necas

znecas@schulich.yorku.ca

N309 SSB

ADMIN

ZDENEK NECAS - INSTRUCTOR

BRIEF DESCRIPTION

This course combines the necessary strategic and analytical thinking skills for effective management. This course is about identifying, analyzing and articulating the key issues that impact organizations and applying the appropriate frameworks that can assist managers in reaching better decisions. Students use the frameworks and strategic analysis tools developed in SB/SGMT 3000 3.00 or SB/INTL 3000 3.00 and systematically apply them to real-life business situations. Previously offered as: SB/SGMT 3300 3.00.

Prerequisite: SB/SGMT 3000 3.00 or SB/INTL 3000 3.00 (Previously offered as SB/INTL 4400 3.00).

COURSE LEARNING OUTCOMES

The objective of this course is to further develop strategic thinking, analytical thinking, and critical thinking skills as they apply to business strategy.

The course complements strategic management theory and strategic analysis with explicit applications to real-life situations, primarily through the use of case studies. Specifically, this course is intended to further develop the students' skills in sizing up a situation, deciding what the critical issues are, bringing structure to their analysis of the issues, and developing compelling, defendable recommendations.

The focus throughout the course is four-fold:

a) Identifying the key issues or strategic challenges facing an organization;

b) Analyzing and prioritizing the various components of each issue;

c) Articulating the potential impact of the issue on the organization's viability; and

d) Communicating a set of recommendations effectively.

Essentially the philosophy of this course is about experiencing and articulating the factors that drive strategy. Students use the frameworks and strategic analysis tools acquired in core startegy courses, but are encouraged and expected to develop the capacity, competence and confidence to apply them to real-life business situations, such as a work setting, team discussions, job interviews, and formal presentations.

This course is about strategy and related concepts. The focus throughout is on strategic management, the task of crafting, implementing, executing, and monitoring an organization's strategy. The emphasis is on the kinds of problems and issues that affect the success of the entire organization. The majority of content and the cases discussed in the course place emphasis on the profit-oriented enterprises operating in a competitive environment. We address the multitude of challenges facing managers today emanating from economic, competitive, ethical, globalization, technology, corporate governance, and entrepreneurial developments that shape every organization's daily reality.

The course uses readings, lectures, case discussions and role plays to expose students to a wide range of terms and concepts, as well as the kinds of situations that face managers and bear directly on an organization's ultimate success.

The material covered draws on the evolving body of literature in strategic management and presents the prevailing views and ideas about the manager as the architect and implementer of strategy.

Students are expected to develop an appreciation of the strategic issues facing managers and adopt an appropriate vocabulary and tool kit to respond to strategic issues. As such, the course uses case studies extensively to allow students to develop and demonstrate the skills in dealing with complex situations and synthesize diverse information in order to identify the core problems, analyze relevant data, identify strategies that are appropriate to each situation, evaluate alternatives, and recommend specific courses of action for creative solutions to problems.

COURSE MATERIAL

The course utilizes a combination of assigned readings and case studies from publishing houses such as Harvard Business School and Ivey Business School. Case studies are available in the case pack to be purchased online here:

Please see the step by step instructions below to purchase the materials required for your course.

Course: SGMT4300R WINTER 2025 COURSE KIT
Professor(s): Zdenek Necas

1. Go to the Ivey Publishing website at **www.iveypublishing.ca (https://www.iveypublishing.ca)**
2. Log in to your existing account or click "Register" to create a new account and follow the prompts to complete the registration. If registering, choose the "Student" role.
3. Click on this link or copy into your browser: **https://www.iveypublishing.ca/s/ivey-coursepack/a1ROF000002lnfF2AQ (https://www.iveypublishing.ca/s/ivey-coursepack/a1ROF000002lnfF2AQ)**
4. Click "Add to Cart".
5. Go to the Shopping Cart (located at the top of the page), click "Checkout", and complete the checkout process
6. When payment has been processed successfully, from the Order Confirmation screen, click on "Access Purchases", then click "Downloads".
7. If the coursepack contains Digital learning Experience or Multimedia materials, click on "Go to Course" or "Go to Simulation".

IMPORTANT: Access to downloadable files will expire on the course end date, so be sure to save a copy on your computer. The downloadable file is a PDF document that can be opened using Adobe Reader. This material is for your personal use only and is not to be shared, reproduced, or distributed in any form.

The students are expected to make use of their SGMT 3000 / INT3000 textbook; the discussion in class assumes that the textbook is readily available and sourced on an ongoing basis by the students.

Strategic Management: Theory: An Integrated Approach (13th Edition), by C.W. Hill, G.R. Jones & M.A. Schilling, Nelson Education (from SGMT3000/INTL3000)

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Midterm Exam 25%			
Midterm Exam		25%	Thu Feb 27, 2025 at 02:30pm EST
Written Case Analysis 25%			
Written Case Analysis		25%	Thu Mar 13, 2025 at 02:31pm EDT
Participation 20%			
Participation		20%	
Group Case Exam 30%			
Group Case Exam		30%	Thu Apr 3, 2025 at 02:30pm EDT

WRITTEN ASSIGNMENTS: EVALUATION

All written work is evaluated for (a) careful use of relevant facts, b) rigorous selection and application of pertinent theories, concepts, and frameworks c) generation of insights by leveraging both relevant facts and analytical outputs to offer a novel understanding of the business situation and uncover key interrelationships d) argumentative clarity achieved by logical reasoning e) the quality of writing including formatting, spelling, grammar, organization, and conciseness. It is important to communicate your ideas clearly and concisely, otherwise even the best ideas get undermined because of faulty presentation. Space constraints should help you do this.

All written work will be submitted to TURNITIN, a tool that identifies many different types of plagiarism with a high degree of accuracy. This tool identifies plagiarism within the class as well as external sources such as the Internet. Where credible evidence of academic dishonesty is found, students will be submitted to the disciplinary process of the university.

NOTE:

a. All written work is due at the beginning of the class via upload to Canvas and should be neatly typed (double-spaced, 1" margins, Times New Roman font, 12 characters/inch).

b. Late assignments will not be accepted. There will be no make-ups permitted.

c. Papers not adhering to assignement specific length specifications and other formatting requirements may be returned at my discretion.

GRADING SCHEME

A+	100%	to	89.5%

A	< 89.5%	to	79.5%
B+	< 79.5%	to	74.5%
B	< 74.5%	to	69.5%
C+	< 69.5%	to	64.5%
C	< 64.5%	to	59.5%
D+	< 59.5%	to	54.5%
D	< 54.5%	to	49.5%
F	< 49.5%	to	0%

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Midterm Exam.

Due Date: Thu Feb 27, 2025 at 02:30pm EST

There will be one in-person / closed book midterm exam in week 7 that aims to test students' individual understanding of the material covered in the course in sessions 1-6 and students' ability to apply it in practice. It will be either a case, a case synopsis, some scenario or excerpts from articles in the popular press (or other such sources) to be provided to you, accompanied by questions to guide your answers.

Written Case Analysis.

Due Date: Thu Mar 13, 2025 at 02:31pm EDT

Case Assignment

The case analysis is an individual assignment.

The case to be analyzed together with questions and detailed instructions will be provided by the instructor after session 8.

Notes:

1. The case assignment is due prior to the beginning of 9. class via submission to Canvas. Late assignments will not be accepted as the case will be discussed in class.

Formatting requirements: Please refer to the Case Assignment Instructions posted at Modules / Week 8.

Participation.

Generally, we will discuss conceptual models in each class and also analyze a case. It is expected that students will read all required conceptual material as well as the case for each class. In addition, students are expected to have given some thought to the case-related questions in advance of the class.

PARTICIPATION: GRADING CRITERIA - The following descriptions represent a continuum of participation for grading purposes.

Outstanding Contributor – 80%-100% - Contributions in class represent exceptional preparation. Ideas offered are always substantive and consistently provide several major insights as well as a direction for the class. Arguments, when offered, are well substantiated and persuasively presented. If this person were not a member of the class, the quality of the discussion would be significantly diminished.

Good Contributor – 70%-79% - Contributions in class represent thorough preparation. Ideas offered usually are substantive, provide good insights, and sometimes provide direction for the class. Arguments, when offered, are generally well substantiated and are often persuasively presented. If this person were not a member of the class, the quality of the discussion would be considerably diminished.

Adequate Contributor – 60-69% - Contributions in class represent satisfactory preparation. Ideas offered are sometimes substantive, provide generally useful insights, but seldom offer direction for the class. Arguments, when offered, are fairly well substantiated and are sometimes persuasive. If this person were not a member of the class, the quality of the discussion would be diminished somewhat.

Unsatisfactory Contributor – 0-59% - Contributions in class represent inadequate preparation. Ideas offered are seldom substantive, provide few, if any, insights, and never give a constructive direction for the class. Integrative arguments and effective comments are never presented. Class contributions are, at best, "cherry picking" efforts making isolated, obvious, or confusing points. If this person were not a member of the class, valuable air time would be saved.

Nonparticipant – 0% - This person has said little of nothing in this class to date. Hence, there is no basis for evaluation. If this person were not a member of the class, the quality of the discussion would be unchanged.

Group Case Exam.

Due Date: Thu Apr 3, 2025 at 02:30pm EDT

Students are randomly assigned into groups. At the end of the 11. class, groups are presented with a case study and are given until the beginning of the 12. class to analyze and prepare a detailed report including relevant analyses, conclusions, and recommendations. The report needs to be submitted to Canvas prior to the 12. class, no extensions will be given. Based on the report, each group will prepare a 15-minute presentation and will submit an electronic copy of their slide deck to Canvas prior to the 12. class.

The grade for this assignment is based on the quality of the written report (see Syllabus for the evaluation criteria). Up to 10 percentage points will be deducted from the group grade for this assignment should a group deliver a sloppy presentation. All group members must deliver some part of the presentation and all group members must attend the entire 12. class.

A peer review document will be posted under Module 12. Up to 10 percentage points will be deducted from the individual grade for this assignment should a student engage in free-riding behaviour. There are two outcomes of the peer review process. Outcome A: No free-riding behaviour took place in which case no peer review needs to be submitted. Outcome B: Not all group members agree that everyone contributed equally to this assignment. In such case, each group member needs to send me by e-mail the peer review filled in individually by April 5th.

Detailed instructions in terms of the formatting, length, and other requirements for both the report and the presentation will be provided together with the assignment.

CLASS-BY-CLASS SYLLABUS

Week 1

Jan 9/25

Overview: Introduction - Strategic and Analytical Thinking Skills

Readings:

Mintzberg, H., and Gosling, J., "The Five Minds of a Manager" Harvard Business Review, November 2003. **[YUL]**

Porter, Michael, "What is Strategy" Harvard Business Review, November-December 1996. **[YUL]**

Review Chapter 1 from the textbook (annual planning cycle, mission/vision/strategic objectives)

Week 2

Jan 16/25

Overview: External Analysis

Readings:

Mankins, M.C., and Steele, R., "Turning Great Strategy into Great Performance" Harvard Business Review, July 2005. **[YUL]**

Pisan, G., "You need an innovation strategy," Harvard Business Review, June 2015. **[YUL]**

Review Chapter 2 from the textbook

Case: Global Wine Wars 2009: New World versus Old

Case Questions for Class Discussion

How did the French become the dominant competitors in the increasingly global wine industry for centuries? What sources of competitive advantage were they able to develop to support their exports? Where were they vulnerable?

What changes in the global industry structure and competitive dynamics led France and other traditional producers to lose market share to challengers from Australia, United States, and other New World Countries in the late twentieth century?

What advice would you offer today to the French Minister of Agriculture? To the head of the French wine industry association? To the owner of a mid-size well regarded Bordeaux vineyard producing wines in the premium and super premium categories?

What advice would you offer today to the Australian Minister of Agriculture? To the head of the Australian wine industry association? To the owner of a mid-size, well regarded vineyard in the Barossa Valley (a premier Australian wine region) producing wines in the premium and super premium categories?

Week 3

Jan 23/25

Overview: Understanding Strategic Issues within an Organization

Readings:

Review Chapters 3 & 5 from the textbook.

David Meer and Samrat Sharma, "Creating an Organic Growth Machine", Harvard Business Review, May 2012. **[YUL]**

Case: Louis Vuitton

Case Questions for Class Discussion

1. How has LVMH been performing? How does its performance compare to that of its competitors?

2. How has the leather and fashion group, of which LV is the anchor business, been performing? Why has LV been so successful?

3. What are the challenges facing LV?

4. What are the options available to LV? As a senior manager at LV, what options would you pursue and why?

Week 4

Jan 30/25

Overview: Strategic Restructuring - Managing Change

Review Chapter 12 from the textbook

Readings:

Magids, Scott, Zorfas A. and Leemon, D., "The New Science of Customer Emotions," Harvard Business Review, November 2015. [**YUL]**

Case: Maple Leaf Foods: Changing the System (The main case as well as cases A,B,C,D,E)

Case Questions for Class Discussion

Questions for the Main Case (Questions for the A,B,C,D,E cases will be provided in class):

1. What is the purpose of a firm? - This question is intentionally broad.

2. How do organizations typically view their responsibilities to societal or environmental goals?

3. What are the pros and cons of Maple Leaf Foods (MLF) making sustainability its core purpose?

4. What other perspectives should be considered?

5. Develop an action plan for MLF to support its goal of being the world's most sustainable protein company.

Week 5

Feb 6/25

Overview: International Ventures

Review Chapter 8 from the textbook

Readings:

Steven J. Thompson, "The Perils of Partnering in Developing Markets", Harvard Business Review, June 2012. [YUL]

Wakayama, T., Shintaku, J., Amanoe, T. "What Panasonic Learned in China", Harvard Business Review, December 2012. [YUL]

Ahrendts, A. "How I did it: Burberry's CEO on Turning an Aging British Icon into a Global Luxury Brand", Harvard Business Review, January/February 2013. [YUL]

Case: Costco Wholesale Corporation: Market Expansion and Global Strategy

Case Questions for Class Discussion:

Analyze the competitive nature of the dynamic global retail industry over the last two decades. What are the different modes of entry for global expansion? Discuss and evaluate Costco's mode of entry for the various markets in which it is operating. What ideal mode of entry would you recommend for new markets?
Analyze the key success factors contributing to Costco's superior performance and the key challenges Costco faces in its eight markets.
What future strategy do you recommend for Costco to overcome the strategic challenges it faces? Should Costco enter India and China? Give reasoning for your recommendation and suggest next steps for the company.

Week 6

Feb 13/25

Overview: Executing on Competitive Advantage

Review Chapter 3 from the textbook

Readings:

Friedman, Stewart D., "Work+Home+Community+Self – Harvard Business Review, September 2014. **[YUL]**

Case: Edmonton Opera's Balanced Scorecard: The Art of Performance

Case Questions for Class Discussion:

What is Edmonton Opera's (EP) strategy?
What is EP's current performance?
Design a balanced scorecard for EP.

Week 7

Feb 27/25

Overview: Midterm Exam

Week 8

Mar 6/25

Overview: M&A as a Strategic Tool

Review Chapter 6 from the textbook

Readings:

Lax, D., Sebenius J. "Deal Making 2.0: A Guide to Complex Negotiations", Harvard Business Review, November 2012. **[YUL]**

Perry, J.S. "Mergers and Acquisitions: Reducing M&A Risk Through Improved Due Diligence", Strategy & Leadership, January 2004, 32(2). **[YUL]**

Birkinshaw, J. and M. Haas, "Organizational Culture: Increase Your Return on Failure" HBR May 2016. **[YUL]**

Case: Merging American Airlines and US Airways (A&B)

Case Questions for Class Discussion:

1. If you were the CEO of US Airways, how would you justify the merits of this merger to internal and external stakeholders?
2. Why do you think American's Chairman, President, and CEO Thomas Horton initially opposed the merger?
3. In contrast, why do you think employees of American Airlines supported the merger?
4. Should the new management team be dominated by US Airways managers or should the management teams from both airlines be broadly represented?
5. What were the main challenges involved in the American Airlines and US Airways merger?
6. What are the key mechanisms at the disposal of Doug Parker to lower the uncertainty surrounding the merger and ensure a successful integration process?

Week 9

Mar 13/25

Overview: Innovation and Strategy - Case Assignment Due

Review Chapter 7 from the textbook

Readings:

C.K. Prahalad and R. A. Mashelkar, "Innovation's Holy Grail" Harvard Business Review, July-August 2010. **[YUL]**

Case: Boeing 737 MAX: Company Culture and Product Failure

Case Questions for Class Discussion:

1. Describe Boeing's competitive environment and business strategy. Does it have a strategy? Is its strategy clear to you?

2. Is the organizational culture at Boeing a good fit with its strategy?

3. Which types of behavioral control are the best fit for its strategy? Do you see them reflected in this case?

4. What can you deduce about organizational structure in this case? Is Boeing's structure a good fit with its strategy?

5. How is Boeing destroying value? What does Boeing need to do to improve strategy implementation? What about strategy formulation?

Week 10

Mar 20/25

Overview: Assessing Factors Impacting Strategy Implementation

Review chapter 12 from the textbook

Readings:

Roger L. Martin, "The Execution Trap", Harvard Business Review, July-August, 2010. **[YUL]**

Case: Amazon.com, Inc.

Case Questions for Class Discussion:

1. Does Amazon.com, Inc. (Amazon) possess competitive advantage?

2. Perform a SWOT analysis for Amazon. Pay particular attention to industry convergence. What are the strategic implications for Amazon?

3. Which strategies and business models are being employed by the major competitors in this case? Which are the most successful and why?

4. Formulate strategy and business model that would allow Amazon to remain profitable.

5. What are the implications of your strategy formulation at the business level for Amazon's corporate strategy?

6. How should Jeff Bezos go about implementing any changes to the business and corporate strategy recommended earlier? What changes to structure and processes need to take place?

Week 11

The Intersection of Economics and Strategic Management / Group Case Assigned

Week 12

Group Case Presentations

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

The class will meet once a week via Zoom for about 2 hours. There is no tutorial. Generally, we will discuss conceptual models in each class and also analyze a case. It is expected that students will read all required conceptual material as well as the case prior to each class. In addition, students are expected to have given some thought to the case-related questions in advance of the class.

Class Participation (contribution)

PARTICIPATION: GRADING CRITERIA - The following descriptions represent a continuum of participation for grading purposes.

Outstanding Contributor – 80%-100% - Contributions in class represent exceptional preparation. Ideas offered are always substantive and consistently provide several major insights as well as a direction for the class. Arguments, when offered, are well substantiated and persuasively presented. If this person were not a member of the class, the quality of the discussion would be significantly diminished.

Good Contributor – 70%-79% - Contributions in class represent thorough preparation. Ideas offered usually are substantive, provide good insights, and sometimes provide direction for the class. Arguments, when offered, are generally well substantiated and are often persuasively presented. If this person were not a member of the class, the quality of the discussion would be considerably diminished.

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Nonparticipant **–** 0% - This person has said little of nothing in this class to date. Hence, there is no basis for evaluation. If this person were not a member of the class, the quality of the discussion would be unchanged.

GENERAL SCHULICH ACADEMIC POLICIES

Grading

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

Academic Honesty

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

Accommodations

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

Exams (Absence from)

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

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

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

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

Visiting Campus

All York community members share in the responsibility of keeping others safe on campuses, and to uphold professional and respectful interactions with one another. In this class, as elsewhere on campus, students must comply with all University health and safety regulations or protocols, including the following:

- Do not attend in-person activities at any of York University's campuses/locations when you are feeling unwell. Please complete a self-assessment on YU Screen to receive support from a member of the University's case and contact management team.
- Wear a high quality, snugly fitting mask that completely covers the mouth, nose, and chin in all indoor spaces on campus
- Do not eat or drink in instructional spaces, including research and shared spaces (e.g., Libraries), unless for urgent health reasons.

More Information about COVID-19 health and safety measures can be found on the **Better Together (https://www.yorku.ca/bettertogether/)** website.

Encouraging a Community of Care

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

Student Rights and Responsibilities

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

The Schulich School of Business strongly supports and adheres to the **Code of Student Rights and Responsibilities (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)** . All students have rights and responsibilities as outlined in this document and are expected to uphold the identified values for the benefit of the entire community.

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

Take time to fully review the Code of Student Rights and Responsibilities: https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/ (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)

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

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

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

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

To: Faculty Council, Schulich School of Business
From: Burkard Eberlein, BBA/iBBA Program Director
Date: October 29, 2025
Re: Nunavut Transfer Credit Approval

MOTION:

That BBA Committee and Faculty Council approve the granting of one 3.0 elective credit to Government of Nunavut Leaders who graduate from the Schulich Executive Education 'Masters Certificate in Public Sector Leadership' and who subsequently apply successfully and are admitted to the BBA Program.

This is an exceptional arrangement to reflect Schulich's commitment to partnership and access towards Indigenous (in this case Inuit) communities. It does in no way set a precedent for transfer credits or alternative forms of entry to the BBA program.

RATIONALE:

The Government of Nunavut is a client of Schulich Executive Education. Senior officials from the Government of Nunavut take a 'Masters Certificate in Public Sector Leadership' offered by Schulich ExEd. We have been approached to see if this certificate could be recognized as elective credit in the BBA program. This would entail that graduates of the certificate, if they decide to apply to the BBA program, would be granted one (3.0) elective grade towards the BBA degree.

Practically, the implications are very limited, as only very few if any government officials will consider taking our in-person degree. It is more of a symbolic gesture to signal partnership and our commitment to access towards Indigenous (in this case Inuit) communities. The Dean is fully in support, as documented in the detailed package.

It is important to note that this is an exceptional arrangement that does not create a precedent. The BBA program remains a direct-entry program with no transfer credit prior to admission. Furthermore, applicants from the Government of Nunavut Leaders group will need to meet the standards admission requirement, like any other applicant.

Memorandum of Agreement

Government of Nunavut Masters Certificate in Public Sector Leadership Access program pilot

Intent of the Agreement

To establish a mechanism through which the Schulich Masters Certificate in Public Sector Leadership for Government of Nunavut Leaders credential may be used to satisfy certain degree requirements in the Bachelor of Business Administration degree programs as described in Appendix A.

Term

This Agreement shall be effective for a period of three (3) years commencing in Fall 2026 and ending in Fall 2029.

Termination

a) At the conclusion of the term, the MOA may be renewed.
b) If a sector-wide (MCU) or pan-university or faculty policy or procedure governing non-degree studies and/or micro-credentials for credit is introduced at any time during the term of this agreement, that policy/procedure will take precedence and should be followed to continue this arrangement, as applicable.
c) The agreement may be terminated prior to Fall 2029 by the Dean of Schulich School of Business in consultation with the Vice-Provost Academic and the Vice-Provost Teaching & Learning.

Articulation Review

a) The Curriculum Committee of the department taking part in this arrangement will be responsible for an annual review of the Non-degree studies program – for – credit arrangement throughout the term of the Agreement.

Signatures:

Dean DATE:

Department Chair:

Name Date:

Appendix A

The non-degree credentials in the following list are deemed to satisfy the following degree requirements for the BBA, as specified. Credentials may be added to this list annually, following SSB's review of the agreement; new additions to the list should be appended to this document. Credentials must be approved following the SSB Non-Degree Studies Approval Process, see Appendix B.

- Name of Credential: Schulich Masters Certificate in Public Sector Leadership for Government of Nunavut Leaders

Program	Degree requirements satisfied	Maximum number of credits that can be satisfied with MC	Other restrictions
BBA	• Schulich Electives at the 3000 level.	3.0 credits	BBA curric committee to add exclusions – this would be any course that is too similar to the Nunavut Program. In other words, if they receive credit for the Nunavut program they can't also receive credit for a very similar course.

Eligibility and Enrolment

In order to receive credit for the Government of Nunavut Masters Certificate in Public Sector Leadership, prospective students must apply to and be admitted to the Bachelor of Business Administration program following normal procedures. Students must progress to year three of the program in order to be granted the transfer credits, which are deemed to satisfy 3.00 credits of the "Schulich Elective" as described above.

Transcript Notation

Non-degree studies courses will appear on the transcript as transfer credits. Credits will not be transferred automatically. Students must apply for transfer credits; Schulich Student and Enrolment Services staff may facilitate this for students.

Non-degree studies courses being used to satisfy degree requirements will be documented as Pass/Fail. A notation will be included on students' record for degree audit.

Transfers to other Faculties

This agreement applies only to students enrolled in any BBA program as their first major. Students should be made aware that Schulich ExecEd non-degree studies courses are not deemed to satisfy degree requirements in programs in other Faculties and they may be required to take additional courses to satisfy degree requirements should they transfer to a different faculty. Students should sign an agreement indicating their awareness; this should be added to their record for degree audit.

Expiry

The transfer credits may be deemed to satisfy degree requirements within six years of the student's initial enrolment in the non-degree studies course degree program. After that date, degree requirements as per York University Undergraduate Calendar will apply.

Roles and Responsibilities

Schulich ExecEd will:

- Ensure all non-degree studies credentials included in this agreement have been approved following the SSB Non-Degree Studies Process
- Ensure that students are made aware of the eligibility and limitations on using non-degree studies credentials to satisfy degree requirements.

The BBA program leadership:

- Review the agreement annually and revise the table in on page 3, as required, by Fall 2026.

Schulich
School of Business
York University
Toronto Canada

Memorandum

To: Whom It May Concern
Cc: Burkard Eberlein, Program Director, Bachelor of Business Administration
From: Detlev Zwick, Dean, Schulich School of Business
Date: March 19, 2025

Subject: Support for Memorandum of Agreement for Credit Transfer of BBA Elective for Qualified Government of Nunavut Employees

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Seymour Schulich Building
Schulich School of Business
York University
4700 Keele Street
Toronto, Ontario
Canada M3J 1P3

Web: www.schulich.yorku.ca

I would like to enthusiastically express my full support for the development of an access initiative expressed in the Memorandum of Agreement for the transfer of 3.00 elective credits in Schulich's Bachelor of Business Administration to individuals who have successfully completed the Masters Certificate in Public Sector Leadership for Government of Nunavut Leaders programming through Schulich Executive Education.

While the admission requirements, learning outcomes, assessment, and promotion standards will be maintained in the BBA, the Memorandum of Agreement recognizes the relevant prior learning and experience of Government of Nunavut employees who may be interested in pursuing university undergraduate degree education. The introduction of this access initiative aligns to the York University Academic Plan 2020-25 (extended) priority of Twenty-first Century Learning, specifically through "continued efforts to make York a more attractive destination for all potential students, including Indigenous students and equity seeking groups" (21st Century Learning – York University UAP).

Because the BBA is an in-person program, we anticipate only a small number of Government of Nunavut employees will be in a position to enroll in the degree program (i.e. between 1 and 5 students per year) upon an offer of admission. As stated in the Agreement, Government of Nunavut employees who complete the Schulich Executive Education programming are subject to the regular admissions criteria and process to access the Bachelor of Business Administration. The proposed changes will not introduce the need for additional resources. Based on the minimal resource implications and the steps to ensure the program is accessible and attractive to well qualified students, the Memorandum of Agreement aligns to Faculty and University strategic priorities.

In conclusion, I wish to express my full support for the Memorandum of Agreement and thank the BBA program, Government of Nunavut, and Schulich Executive Education leaders for a well-conceptualized plan to create pathways into the Bachelor of Business Administration.

Detlev Zwick, PhD
Dean & Tanna H. Schulich Chair in Digital Marketing Strategy
Schulich School of Business

UNIVERSITÉ
YORK
UNIVERSITY

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Murat Kristal, Program Director, Tech MBA Program
Date: October 17, 2025
Re: Motion Regarding Detailed Minor Program Change for the Tech MBA

Motion: That Faculty Council approve the proposed **Detailed Minor Program Change** to the **Master of Business Administration in Technology Leadership (Tech MBA)** program, effective **Fall 2026**, as submitted by the Schulich School of Business.

The proposed changes include:

1. The introduction of a **part-time delivery option** in addition to the existing full-time format;
2. An increase in the total program credits from **49.5 to 52.5** to incorporate newly developed courses reflecting current and emerging trends in technology management, digital transformation, and data-driven leadership; and
3. Minor revisions to course sequencing and term structure to improve curricular integration and program coherence.

These changes do not alter the program title, degree designation, or overall learning outcomes and are being advanced to enhance accessibility, curricular relevance, and alignment with market and student needs.

Rationale: The purpose of this motion is to seek approval for a set of minor modifications to the Master of Business Administration in Technology Leadership (Tech MBA) program at the Schulich School of Business. These changes are designed to enhance program accessibility, modernize the curriculum, and ensure continued alignment with the evolving needs of students and industry partners, while maintaining the program's existing learning outcomes and academic integrity.

The proposed revisions include the introduction of a part-time delivery option in addition to the existing full-time format, thereby increasing flexibility for working professionals who wish to pursue the program while remaining active in the workforce. The total number of credits required for graduation will increase from 49.5 to 52.5 credits to accommodate newly developed courses that strengthen competencies in key areas such as digital transformation, data-driven decision making, and technology-enabled leadership.

These additions reflect the School's ongoing commitment to ensuring that the curriculum remains current, rigorous, and relevant to the rapidly changing technological and business landscape. Minor adjustments have also been made to course sequencing and term structure to improve the overall coherence and integration of learning across modules. These refinements enhance the logical progression from foundational business and technology concepts to advanced applications in leadership, strategy, and innovation.

No changes are proposed to the program title, degree designation, or core learning objectives. The proposed updates constitute a Detailed Minor Program Change as defined under York University's governance framework, as they maintain the academic essence of the program while improving delivery flexibility and curricular alignment with contemporary market demands.

Detailed Minor Modification Proposal

Faculty: Schulich School of Business
Department:
Program: MBA in Technology Leadership
Degree Designation: MBA in Technology Leadership
Type of Modification: Addition of a part-time program option; increase of program requirements from 49.5 to 52.5 credits; changes to core courses
Location: Keele Campus
Effective Date: September 2026
Approval Date at Faculty Council:

1. Describe the proposed modifications to the program.

The MBA in Technology Leadership (Tech MBA) will undergo the following curricular adjustments effective Fall 2026:

- **Credit Requirement Adjustment**
  The total program credit requirement will change from **49.5 credits** to **52.5 credits**.
- **Addition of a Part-Time Delivery Option**
  A part-time option will be added alongside the existing full-time delivery, using the same curriculum.
- **Core Course Changes**
  - **Experiential Learning:** *Venture Studio (4.5 credits)* revised from 6.0 credits; a new *Technology Consulting Project (4.5 credits)* is introduced as an alternative to Venture Studio to meet the experiential requirement.
  - **Technology-Focused Core Additions (1.5 credits unless otherwise noted):**
    - Data Analytics for Business Leaders (OMIS 5310) 1.5
    - Technology Project Management (OMIS 6016) 1.5
    - Strategic Consulting in Technology Context: Lifecycle Analysis & Communication (OMIS 6015) 1.5
    - Enterprise Risk Management (OMIS 5311) 1.5
    - Storytelling with Data (OMIS 6631) 1.5
    - Design Thinking for Innovation (OMIS 6621) 1.5
    - Introduction to Business Contracts (MGMT 6010) 1.5
    - Leveraging AI in Organizations (OMIS 6640) 1.5
    - Modern IT Architecture (OMIS 6018) 1.5
    - Technology Enabled Operations Management (OMIS 5401) 1.5
    - Business Intelligence with Database Applications (OMIS 5400) 1.5
    - Technology & Global Competition (MGMT 5400) 1.5
  - **Foundational Business Core (existing MBA courses now required in Tech MBA):**
    - Professional Development for Managers (MGMT 6350) 3.0
    - Financial Accounting for Managers (ACTG 5100) 3.0
    - Managerial Finance (FINE 5200) 3.0
    - Strategy (SGMT 5200) 3.0

        - Marketing Management (MKTG 5200) 3.0
    - **Other Core Updates:**
        - Product Management (MKTG 5210) — new required core.
        - Leadership Skills for a Digital World (ORGS 5210) 3.0 — remains required.
        - Markets, Firms, and the Global Economy (ECON 5111) 3.0 — added to core.
        - Graduate Placement Course (MGMT 5300) 6.0 — added to support work-integrated learning outcomes.
- **Sequencing and Delivery Changes**
  Courses have been repositioned across terms to support the part-time stream and to allow modular half-term delivery.

No changes are proposed to the Program Learning Outcomes.

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.
Please see attached.

3.1 List the current and/or updated Program Learning Outcomes for the proposed modified program.[1]
The PLOs remain substantively unchanged; the program continues to ensure graduates will:
MBA in Technology Leadership (MBAT)
Goal 1: Core Business Knowledge & Understanding
Demonstrate knowledge of the main theories, concepts, methods, and current issues as they are practiced within the digital world.
Goal 2: Critical Analysis and Decision-Making
Integrate foundational knowledge to make complex and strategic organization level decisions that create sustainable value.
Goal 3: Professional Communication
Ability to listen and communicate business concepts clearly and effectively in various formats using appropriate technology.
Goal 4: Effective Teamwork
Collaborate effectively in teams, leveraging the diverse experiences and expertise of all members.
Goal 5: Responsible Business and EDI
Identify and respond to ethical, social, environmental, DEDI, and global issues arising in business decision-making.

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

[1] 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.

Feedback from students, alumni, and the Tech MBA Advisory Council, as well as analysis of market trends and employer demand, confirmed the need for greater technical rigor and flexible learning. Adding half-credit technology and analytics courses, creating a part-time pathway, and fine-tuning total credits (49.5→52.5) ensure the Tech MBA continues to meet the PLOs while making the program more accessible and industry-relevant.
The curriculum changes keep pace with emerging technologies (AI, cybersecurity, cloud) and strengthen the program's applied learning components, directly supporting the goal of preparing technology leaders.

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

The revised curriculum keeps the existing Program Learning Outcomes but better aligns course content and delivery with them:

Technology Integration and Data-Driven Decision Making (PLOs 1 & 2)
Adding new core courses such as *Data Analytics for Business Leaders, Leveraging AI in Organizations, Business Intelligence with Database Applications,* and *Modern IT Architecture* strengthens students' ability to analyze data and apply technology to business problems.

Strategic and Global Perspective (PLOs 1 & 3)
Introducing *Markets, Firms, and the Global Economy (ECON 5111)* and *Technology & Global Competition (MGMT 5400)* enhances understanding of global markets and competition, supporting strategic leadership in technology-intensive industries.

Applied and Experiential Learning (PLO 5)
Revising *Venture Studio* from 6.0 to 4.5 credits and adding the *Technology Consulting Project (4.5 credits)* preserves and diversifies experiential learning options. Adding the *Mandatory Experiential Learning - Graduate Placement* course 6.0 allows space for new applied courses while retaining structured career integration.

Leadership and Managerial Foundations (PLOs 1 & 4)
We are introducing *Product Management* as a new required course, while adding *Professional Development for Managers, Financial Accounting for Managers, Managerial Finance, Strategy, Marketing Management,* and *Leadership Skills for a Digital World* provide stronger general management capability to complement technical depth.

Flexible Delivery (Supports all PLOs)
Introducing a part-time pathway enables students to integrate real-world work experience with academic learning, strengthening the application of leadership and technology skills.

These changes maintain the original PLO framework but create clearer, better-aligned pathways for students to achieve them.

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

Students already enrolled will have the option to complete their program under the current 49.5-credit structure or opt into the new 52.5-credit curriculum.
Credit equivalencies will be published to ensure smooth transition.
No student will lose progress or face delays in graduation; advising support will help them plan course swaps where needed.

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 resources are required beyond planned faculty hires and existing support.

- **Faculty expertise** in OMIS, Marketing, Strategy, Finance, Accounting, and Organizational Behaviour already covers the revised content.
- **Administrative support** for advising and part-time scheduling will be handled within current staffing. The School uses a matrix structure of services which continue to be available to all academic programs at Schulich.
- **Career services** and experiential education capacity (e.g., CCD) are sufficient and will adapt existing programming.

A Dean's support letter is attached to formalize resource support.

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.

- **Students** (focus groups and surveys) — requested more flexible pathways and deeper technology content.
- **Tech MBA Advisory Council** — confirmed market demand and supported the part-time format and new analytics/technology emphasis.
- **MBA Program Director** – The revised Tech MBA Program will be more integrated with the MBA Program.
- **Internal Schulich Academic Areas** — Accounting, Strategy, Marketing, OMIS, Finance, Organizational Behaviour — reviewed proposed changes and confirmed alignment with faculty expertise and no adverse impact on other programs.
- **Dean's Office and Associate Dean Academic** — supportive of the curriculum refresh and resource plan.

Letters or statements of support from these groups are attached.

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.

The program retains its existing Venture Studio and Graduate Placement Course; no new WIL option is being introduced. Schulich's Office of Career Design, Experiential Education, and Professional Development will continue supporting placement courses and students' career development. No further consultation is required, though experiential components remain aligned with York's experiential education standards.

APPENDICES

Appendix: Side-by-Side Academic Calendar Copy Comparison

Ensure that deletions are indicated with strikethrough text and additions are made in a contrasting colour.

Existing Program/ Diploma/Certificate Information (Change From):	**Proposed Program/ Diploma/Certificate Information (Change To):**
Program Title: Master of Business Administration in Technology Leadership (Tech MBA)	**Program Title**: Master of Business Administration in Technology Leadership (Tech MBA)
Program Length: 16 months (4 terms), full-time	**Program Length:** Full-time: 16 months (4 terms), or Part-Time
Total Credits Required for Graduation: 49.5 credits	**Total Credits Required for Graduation:** 52.5 credits
Delivery Mode: Full-time, in-person	**Delivery Mode:** Full-time and Part-time, in-person
Location: Keele Campus	**Location:** Keele Campus
Program Structure: The Tech MBA is a 16-month, 4-term full-time program. Students are eligible for graduation upon successful completion of 49.5 credits.	**Program Structure:** The Tech MBA is offered in both full-time and part-time formats. Students are eligible for graduation upon successful completion of 52.5 credits.
Term 1 (Fall) • ~~SUST 5100 (3.0) Ethics and Technology~~ • ~~OMIS 5100 (3.0) Emerging Technologies and the Changing Landscape of Business~~ • ~~ECON 5110 (3.0) Digital Economics~~ • ~~MKGT 5100 (3.0) Unlocking Value for Customers Through Technology and Digital Transformation~~ • ~~MGMT 5190 (1.5) Professional Development Hive – Part 1~~	**Term 1 (Fall)** • ACTG 5100 (3.0) Financial Accounting for Managers • MGMT 6350 (3.0) Professional Development for Managers • MKTG 5200 (3.0) Marketing Management • ECON 5111 (3.0) Markets, Firms, and the Global Economy
Term 2 (Winter) • ~~ACTG 5201 (3.0) Financial Reporting and Control in Technology Firms~~ • ~~FINE 5201 (3.0) Finance in the Digital Age~~ • ~~OMIS 5201 (3.0) Digitizing Supply Chain Operations~~ • ORGS 5201 (3.0) Leading and Managing Digital Transformation • ~~MGMT 5290 (1.5) Professional Development Hive – Part 2~~	**Term 2 (Winter)** • FINE 5200 (3.0) Managerial Finance • ORGS 5210 (3.0) Leading and Managing Digital Transformation • MKTG 5210 (3.0) Product Management • SGMT 5200 (3.0) Strategy

Term 3 (Summer) • Electives 1 & 2 (e.g., Realizing Value from AI and Analytics in Organizations; The Fundamentals of Product Management and Marketing of SaaS/Tech Products) • MGMT 6110 (6.0) Venture Studio: The Acceleration Mission (Integrated Field Study)	**Term 3 (Summer) - These courses will span the full length of Term 3.** • MGMT 6110 Venture Studio (4.5): The Acceleration Mission (Integrated Field Study) or • OMIS 6010 (4.5) Technology Consulting Project **Term 3A (Summer) Half Term** • OMIS 5310 (1.5) Data Analytics for Business Leaders • OMIS 6015 (1.5) Strategic Consulting in Technology Context: Lifecycle Analysis & Communication • OMIS 6631 (1.5) Storytelling with Data **Term 3B (Summer) Half Term** • OMIS 6016 (1.5) Technology Project Management • OMIS 5311 (1.5) Enterprise Risk Management • OMIS 6621 (1.5) Design Thinking for Innovation
Term 4 (Fall) • MGMT 5300 (6.0) Mandatory Experiential Learning – Graduate Placement • ~~SGMT 6010 (3.0) Strategic Management in the Digital Era~~ • ~~MGMT 5110 (1.5) Technology Firms and the Global Environment~~	**Term 4 (Fall): These courses will span the full length of Term 4.** • MGMT 5300 (6.0) Mandatory Experiential Learning – Graduate Placement **Term 4A (Fall) Half Term** • OMIS 6010 (1.5) Introduction to Business Contracts • OMIS 6640 (1.5) Leveraging AI in Organizations • OMIS 6018 (1.5) Modern IT Architecture **Term 4B (Fall) Half Term** • MGMT 5400 (1.5) Technology & Global Competition • OMIS 5401 (1.5) Technology Enabled Operations Management • OMIS 5400 (1.5) Business Intelligence with Database Applications

Notes: All students complete a one term internship in technology-enabled organizations and participate in the Venture Studio experiential learning component.	**Notes:** MBA Students who would like to get a Digital Transformation Specialization can take the following courses from Terms 3 & 4: • OMIS 6631 (1.5) Data Visualization and Storytelling • OMIS 6621 (1.5) Design Thinking • OMIS 6018 (1.5) Modern IT Architecture • OMIS 5400 (1.5) Business Intelligence with Database Applications
	Summary of Changes: Program Overview Adjustments • The Tech MBA continues under the same title but now offers both full-time and part-time delivery formats instead of full-time only. • The program length remains 16 months (4 terms), but it is now explicitly available to part-time students. • Total credits required for graduation increase from 49.5 to 52.5 credits to accommodate expanded coursework. • Delivery mode has been updated from Full-time, in-person to Full-time and Part-time, in-person. • Location remains the same (Keele Campus). Structural and Curriculum Revisions • Introduction of Part-Time Option: The revised structure enables part-time study, offering enhanced flexibility for working professionals.

	• Course Sequence Revision:
	  ○ The program is now restructured with new and updated course content across all terms, reflecting stronger alignment with the core MBA curriculum while maintaining a technology and digital transformation focus.
	  ○ The previous half-term course model in Terms 3 and 4 has been reorganized into a combination of full-term and half-term courses.

Sample Full time and Part-time Options

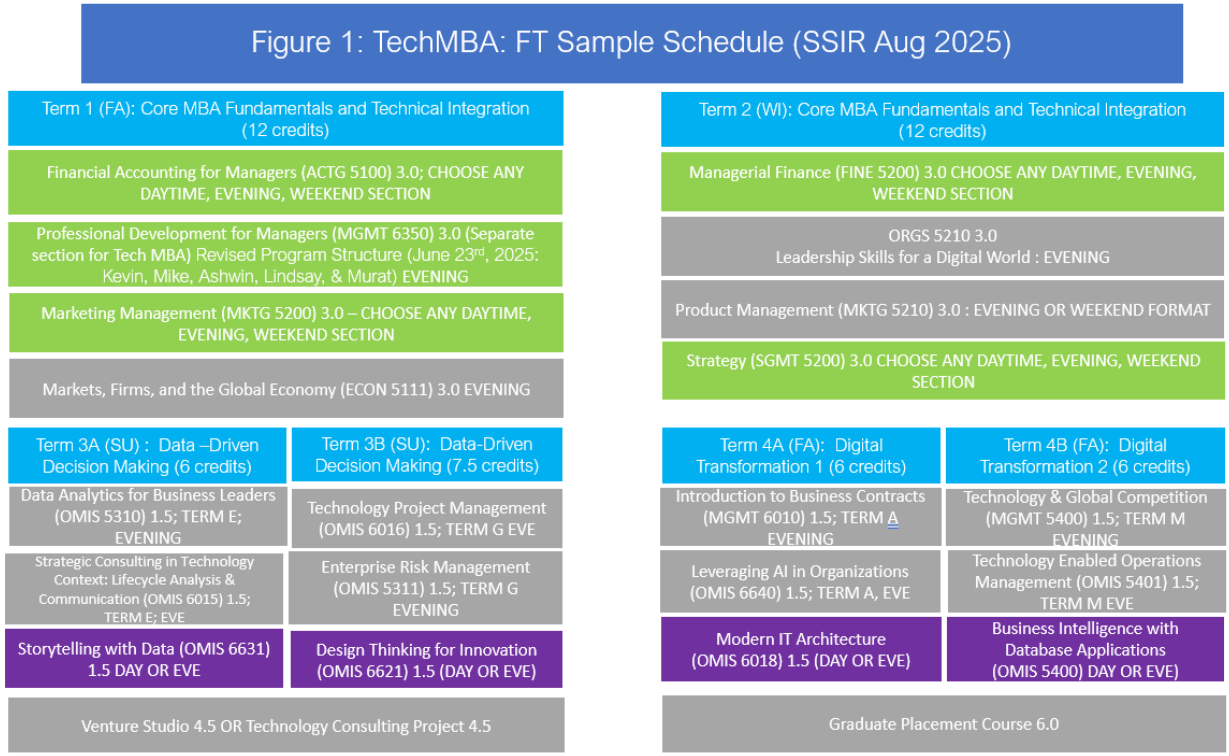


Figure 2: TechMBA: PT Year 1 – Sample Schedule (SSIR Aug 2025)

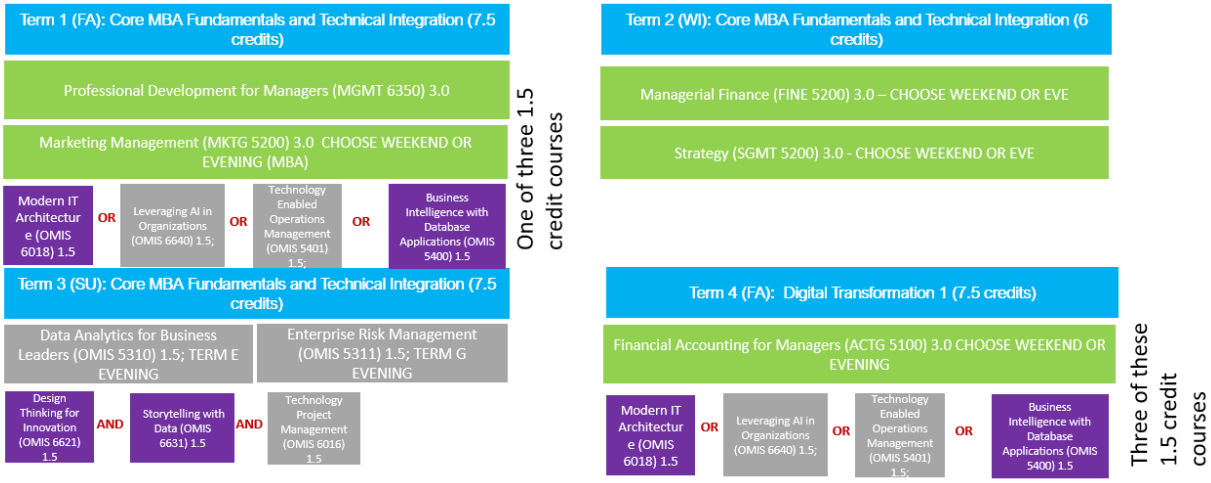
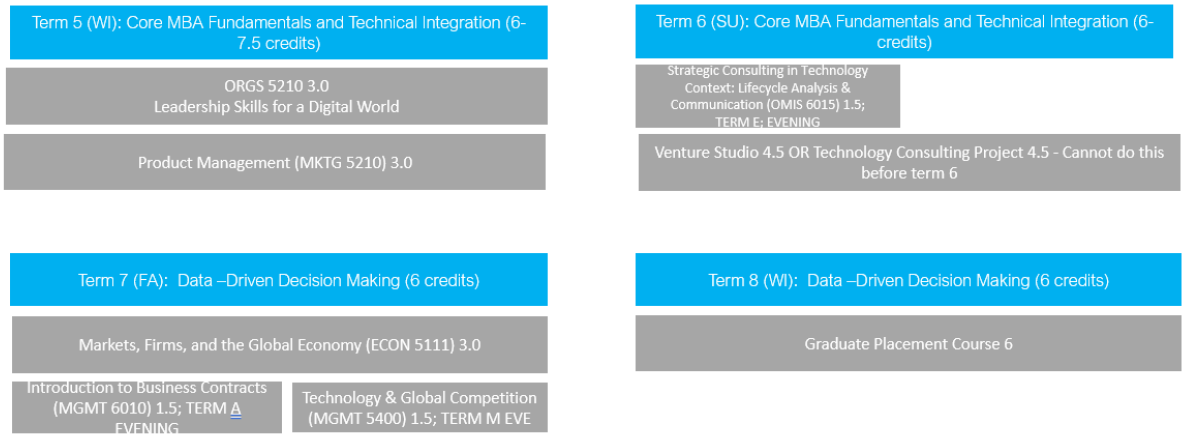


Figure 3: TechMBA: PT Year 2 (SSIR Aug 2025)



Appendix: Consultation and Support Letters

This appendix includes consultation and support confirmations received for the proposed revisions to the MBA in Technology Leadership (Tech MBA) program.
The consultation process involved academic areas, faculty members, and administrative offices within the Schulich School of Business. Each reviewed the proposed curriculum adjustments, new course proposals, and part-time delivery structure, and provided written support.

Summary of Included Materials
The following pages contain email confirmations and letters of support organized by area:

Academic Area Consultations
1. OMIS (Operations Management and Information Systems) Area

- *Enterprise Risk Management (OMIS 5311)*
    - OMIS – Markus Biehl – *Enterprise Risk Management*
    - OMIS – Vibhuti Dhingra & Henry Kim – *Business Intelligence with Database Applications*
    - OMIS – Vibhuti Dhingra, Isik Bicer & Adam Diamant – *Enterprise Risk Management*
- *Technology Enabled Operations Management (OMIS 5401)*
    - OMIS – Ashwin Joshi, Isik Bicer & Eileen Fischer – *Technology Enabled Operations Management*
    - OMIS – Vibhuti Dhingra – *Technology Enabled Operations Management*
    - OMIS – Henry Kim – *Technology Enabled Operations Management*
- *Business Intelligence with Database Applications (OMIS 5400)*
    - OMIS – Markus Biehl – *Business Intelligence with Database Applications*
    - OMIS – Guangrui Li – *Business Intelligence with Database Applications*
    - OMIS – Isik Bicer – *Business Intelligence with Database*
    - OMIS – Vibhuti Dhingra & Henry – *Business Intelligence with Database Applications*
- *Technology Consulting Project (OMIS 6010)*
    - OMIS – Isik Bicer, Vibhuti Dhingra, Markus Biehl, Henry Kim, Divinus Oppong-Tawiah , Raha Imanirad, Guangrui Li – *Technology Consulting Project*

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2. Finance (FINE) Area

- *Managerial Finance (FINE 5200) / Corporate Finance Component*
    - Adam Diamant
    - Amin Mawani
    - Avis Devine
    - Farrokh Zandi
    - Kiridaran (Giri) Kanagaretnam

- Melanie Cao
- Yisong Tian

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3. Management (MGMT) Area

- *Introduction to Business Contracts (MGMT 6010)*
    - Pauline Shum Nolan
    - Vibhuti Dhingra
    - Yelena Larkin
    - Markus Biehl
    - Ashwin Joshi
    - Murat Kristal
- *Technology & Global Competition (MGMT 5400)*
    - Anoop Madhok
    - Ashwin Joshi
    - Majid Majzoubi
    - Theo Peridis
    - Yigang Pan
    - Yuval Deutsch

Consultation and Support Letters: Attached PDF includes all consultation confirmations and support correspondence received from faculty, academic areas, and administrative offices.

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Adam Diamant, OMIS Area Faculty and Area Coordinator
Date: October 23, 2025
Re: Motion Regarding New Courses for the Tech MBA

Motion: That Faculty Council approves the following new OMIS courses and the addition of them to the Tech MBA curriculum:

OMIS 5310 1.50 Data Analytics for Business Leaders
OMIS 6015 1.50 Strategic Consulting in Technology Contexts: Lifecycle, Analysis, and Communication
OMIS 6016 1.50 Technology Project Management
OMIS 5311 1.50 Enterprise Risk Management
OMIS 5401 1.50 Technology Enabled Operations Management
OMIS 5400 1.50 Business Intelligence with Database Applications
OMIS 6018 1.50 Modern IT Architecture
OMIS 6621 1.50 Design Thinking for Innovation
OMIS 6631 1.50 Storytelling with Data

Each course carries a value of 1.50 credits.

Rationale: The addition of the above nine 1.50-credit courses is a central redesign of the Tech MBA program, which aims to provide graduates with a comprehensive toolkit at the intersection of technology and management. Collectively, these courses broaden the program's coverage across several important domains: developing management-level fluency in data-driven decision making, preparing students to engage in complex consulting projects, equipping them with applied project management skills tailored to technology settings, strengthening their understanding of risk governance, and deepening their technical literacy in IT architecture, operations, and database-driven intelligence. By integrating these offerings, the program better aligns with employer expectations for leaders who can bridge the gap between technical teams and strategic business objectives. Furthermore, the courses collectively reinforce the program's emphasis on applied learning and cross-functional integration, ensuring that graduates are not only conversant in technology concepts but also capable of leading transformative initiatives in dynamic organizational environments. The new course outlines are attached, and this motion has the full support from both the OMIS area and the Tech MBA program director. The specified changes are planned to take effect starting Fall 2026.

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: Tech MBA

2. Responsible Unit: OMIS

3. Subject Code (Rubric) and Course Number: OMIS 5310

4. Credit Value: 1.50

5. Long Course Title: Data Analytics for Business Leaders

6. Short Course Title: Data Analytics for Business Leaders

7. Effective Term/Calendar Year: Winter 2027

8. Language of Instruction: English

9. Calendar (Short) Course Description:

In this course, students will learn both the "art", (i.e., conceptual side of data and analytics), and the "science" side of modeling and data-based decision making. This course will introduce students to core elements of data, analytics, and modeling as well as the skills needed to make intelligent use of data in decision making related to business functions and strategies. The key topics include basic data analysis, descriptive and predictive analytics, classification and regression modeling, decision trees (CARTs) and managing business analytical plans. In addition, Python programming will be the foundation for applying hands-on skills in data analysis and modeling.

Prerequisites/Corequisites/Course Exclusions: None

10. Expanded Course Description:

In this course, students will learn both the "art", (i.e., conceptual side of data and analytics), and the "science" side of modeling and data-based decision making. This course will introduce students to core elements of data, analytics, and modeling as well as the skills needed to make intelligent use of data in decision making related to business functions and strategies. The key topics include basic data analysis, descriptive and predictive analytics, classification and regression modeling, decision trees (CARTs) and managing business analytical plans. In addition, Python programming will be the foundation for applying hands-on skills in data analysis and modeling.

In today's time, organizations (public, private, not-for-profit, etc.) have been collecting large amounts of data to help them in making important business and public policy decisions. Examples include retail transactions data, which keeps track of customers' purchase histories, loyalty-program data monitoring purchasing under different promotional environments, social network and online shopping history data, traffic video footage data, crime data, etc. In addition, the decision-making processes are getting increasingly complex, sophisticated, and competitive across these organizations.

In this context, successful business planning and strategy involve processing and analyzing data which can help in evaluating the impacts of business decisions on key metrics (e.g., sales, profit, customer experience, etc.) and thereby complementing the "intuitive" elements of decision making.

At the end of the course, students are expected to develop (or enhance) strong foundations in data-based modeling and decision-making skills.

11. Course Learning Outcomes:

The learning outcomes of this course are:

- Learn basic concepts in data measurement, central tendency, structured and unstructured data

- Examine and summarize data (numerically and visually) using exploratory and descriptive analytics techniques

- Describe applications of business analytics and modeling in decision making to improve KPIs

- Apply modeling techniques (e.g., linear regression, logistic regression, decision-trees, clustering and segmentation, etc.) to solve specific business and decision-making problems

- Evaluate competing analytical models using technical and business criteria (KPIs)
- Explain analytics project lifecycle and its different components using the most relevant industry frameworks to improve project efficiency and outcomes
- Discuss the importance of ethics, privacy, and data governance in achieving analytics success and overcoming challenges related to data and digital transformation

12. Rationale:
This is a required 6-week course in the TechMBA Program that will be offered in Term 3B: Digital Transformation.

13. Evaluation:

Deliverables at a Glance

Assignment/Task	Quantity	Weight %	Total %	Type	Due Date
DataCamp Modules	5	3%	15%	Individual	Ongoing (to be completed by w/o # 4)
Term test 1 (MC and/or TF and/or, short answer questions)	1	25%	25%	individual	w/o # 6
Group project – part 1 (proposal)	1	10%	15%	Group	w/o # 2
Group project – part 2 (final report)	1	25%	35%	Group	w/o # 5
Course reflection / discussion board (ongoing)	1	10%	10%	Individual	w/o # 6
			100%		

Written Assignments/Projects: Descriptions

Submission instructions: Please submit all assignments on Canvas as per the due date indicated on Canvas. Emailed assignments will not be accepted. Late assignments will not be accepted.

<u>Individual Assignment (DataCamp Modules, 15%)</u>: Ongoing, and all modules must be completed by week 4

There will be a set of online modules on select topics (e.g., methodology, programming, etc.) scheduled via the DataCamp platform. The modules will require students to read/watch content on a specific topic (e.g., linear regression, etc.) and then write short codes, filling in for

missing codes, or answer a set of MC / short answer questions related to programing and methodology. The DataCamp platform can be **freely** accessed for these exercises during the timeline of this course. Students are expected to work on these modules in a gradual manner and not leave everything to the last minute.

Once a module is completed, the platform will provide a certificate of completion – indicating the name of the student, and the date of completion.

Students must submit ALL certificates of completion, combined as a single file, on LMS by the due date as proof of completing the modules. No other proof will be accepted.

- The instructor will send an email invitation to students to join the platform at the beginning of the course.
- Students need to create an account with DataCamp using the invitation sent by the instructor.
- Once the account is created, students will have access to DataCamp portal to complete these modules.
- The DataCamp platform is freely available to complete these modules during the timeline of this course.

<u>Individual Assignment (Course reflection + discussion board, 10%):</u> Ongoing, and course reflection must be completed by week 6

Students need to submit a course reflection assignment, on canvas, during week 6, in which they need to discuss key learnings from the course, their experience with completing course related activities (in-class, and online discussion board), and if they completed these activities in a gradual timely manner or all at once!

For discussion board, there will be topics for certain weeks where students need to write their point of views (PoVs) on a given topic. The topic could be related to analytics / decision-making / methodology, and the PoVs should reflect your position on the given topic and/or suggestions to a specific problem, and not a Yes/No type of response. The objectives of the discussion board topic are to learn from each other's PoV, develop critical thinking, and take a position on a given topic based on logic, knowledge, and personal preferences. The PoVs are not "right" or "wrong" and present an opportunity to show creativity, analysis, and ability to critically examine a situation and ask meaningful questions.

Note: Individual discussion board topics **will not be actively monitored by the instructor**. The course reflection document **will be tracked and graded** (10% of the total wight). In the course reflection, students need to write about their experience and key learning, etc. and

Individual term test (25%): Due – week 6

There will be a term test, worth 25% of the total weight of the course. The test will be in the form of (multiple choice and/or T-F and/or short answer questions) and will be conducted via Canvas. The test will be of limited duration (e.g., 60 minutes, 90 minutes, etc.) and must be taken during the class time. Specific details will be provided in advance during the class discussion/ and will also be posted on Canvas.

Students are not expected to consult with each other or take external help regarding the questions and concepts that appeared in the test.

Group Project (Part 1 and 2, overall, 50%):

Students will form groups of four to six people and complete a group project assignment. There will be two parts for the group assignment – part 1 (proposal, 15%) and part 2 (final report, 35%). In the group project, students will collaborate with others to learn, discuss, and come up with specific solutions and recommendations to a set of business problems involving data science and analytics techniques discussed in the course. The groups will be formed based on mutual consensus among students and/or the instructor can also advise about the same.

The data / materials / articles used for group projects can be sourced/suggested by students and / or provided by the instructor. In all cases, the students need to take a formal/informal approval from the instructor before finalizing data and start working on the project. Additional details/ specific information about each part will be discussed during the class/ and will also be posted on Canvas well in advance.

- Group project – part 1 (proposal, 15%): In this part students will analyze the business situation to formulate the problem, finalize key objectives and propose a plan to meet the business objectives (PPTX format) **(Due: week 2)**

- Group project – part 2 (final report, 35%): In this part, students will execute the plan proposed in part 1 based on authentic research and analysis, present the findings, and provide key recommendations to the stakeholders in a form of a professional business report (PPTX format) **(Due: week 5)**

- Peer Assessments**:** As part of the group project, you (individual and confidential) may need to submit a form describing contributions of each team member (including yours),

overall experience working with the team, and highlight any area for improvement in the future. In addition, you need to communicate with the instructor, in a timely manner any concerns which can negatively affect the timeline/overall experience of working in the group.

- The expectation is each member in the group will contribute their fair share to the best of their abilities and not engage in "free riding" behaviour. It is perfectly fine to have differences with you team members on ideas, working plans, etc. and you need to manage those differences based on mutual discussion with your team members in a professional manner. **The instructor will not micromanage day-to-day operational issues of working in the group project. However, if there is credible evidence that a member is completely missing from the work or making marginal or not meaningful contribution to the group work, it will reflect in grades for that member.**

Evaluation of Written Assignments/Projects

Late assignments are not accepted. A late assignment will result in a zero for that assignment. There is no way to make up for a missed assignment. I do not offer additional assignments or extra work in lieu of a missed assignment. Given these facts, please pay close attention to deadlines. Please upload all assignments on Canvas.

Calculation of Course Grade

In this class, final course grades will be determined by the following process: Students' final mark will be derived by weighting each grading component according to the proportions described above. Grades will be converted using the following scale:

GRADE	GRADE POINT	PERCENTAGE	DESCRIPTION
A+	9	≥91-100	Exceptional
A	8	≥86-90	Excellent
A-	7	≥80-85	Very Good
B+	6	≥75-79	Good
B	5	≥70-74	Competent
B-	4	≥65-69	Marginally Competent
C+	3	≥60-64	Passing
C	2	≥55-59	Barely Passing
C-	1	≥50-54	Marginal Pass
F	0	< 50%	Failed

14. Integrated Courses:
This is required course in the TechMBA Program.

15. Cross-listed Courses:
This course will not be cross listed with any other program.

16. Enrolment Notes:
This is a required course for the TechMBA program.

17. Faculty Resources:
The course will be taught annually. Full-time Faculty members in the MBAN/MMAI area that are qualified to teach this course include: Hemant Sangwan.

18. Physical Resources:
The course will be taught in an existing Schulich classroom.

19. Bibliography and Library Statement:

Class 1 Introduction to the concepts of data and programming (measurement, structured vs. unstructured data, Python)

Read (or watch):

1. Structured vs unstructured data: what's the difference? IBM article https://www.ibm.com/think/topics/structured-vs-unstructured-data
2. Describing a dataset. Anil Doshi. Retrieved from https://www.scribd.com/document/495644797/How-to-Describe-a-Data-Set
3. What is CRISP-DM (Cross Industry Process for Data Mining). Retrieved from https://www.datascience-pm.com/crisp-dm-2/
4. Cross Industry Process for Data Mining (CRISP-DM). Retrieved from https://youtu.be/G2wpQ0i3qt8?si=8uox1OxKSXBZODek
5. Setup Python (Google Colab – Preferred): Google Colab Tutorial for Beginners (10 minutes): https://youtu.be/RLYoEyIHL6A?si=1hWBje6Et2rWMW9z

Optional:

Amount of Data Created Daily (2024). Retrieved from https://explodingtopics.com/blog/data-generated-per-day#how-much

Types of Data & Measurement Scales: Nominal, Ordinal, Interval and Ratio. Retrieved from https://www.mymarketresearchmethods.com/types-of-data-nominal-ordinal-interval-ratio/

In-class activities: setting up Python using Google Colab, signing up for DataCamp, finalizing groups

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Class 2 Introduction to analytical models and decision making

Linear regression

Read:

1. Using Decisions in Framing Analytics Problems: A Consulting Perspective - DataEDGE 2015 (25 minutes): https://youtu.be/B_gbR6Tj5ss
2. Overview - Predictive analytics – IBM. Retrieved from https://www.ibm.com/analytics/predictive-analytics
3. Problem-Solving With Algorithms (Amy Pirzada, 2021). Retrieved from https://www.mycodingplace.com/post/problem-solving-with-algorithms

Optional:

1. Algorithmic Thinking. Retrieved from https://teachinglondoncomputing.org/resources/developing-computational-thinking/algorithmic-thinking/
2. How to Develop Algorithmic Thinking in Data Structures and Algorithms? Retrieved from https://www.enjoyalgorithms.com/blog/how-to-develop-algorithmic-thinking-in-data-structure-and-algorithms
3. What is Predictive Analytics-5 Examples. Retrieved from https://online.hbs.edu/blog/post/predictive-analytics

Due: Group project- part 1 (proposal) 15%

Class 3 Logistic regression

Read:

1. Sofia Ciocca (2017). How Does Spotify Know You So Well? (2019). Retrieved from https://medium.com/s/story/spotifys-discover-weekly-how-machine-learning-finds-your-new-music-19a41ab76efe

2. How companies use personal data to charge different people different prices for the same product. Retrieved from https://www.cbc.ca/news/business/marketplace-online-prices-profiles-1.4414240

Class 4 Classification and Regression trees (CART, Decision trees)

Read:

1. Decision Trees. Retrieved from https://scikit-learn.org/stable/modules/tree.html
2. Recommendation Engine. Retrieved from https://blog.dataiku.com/recommendation-engines-how-they-work-in-plain-english

Due: Data Camp modules 15%

Class 5 Clustering analysis and segmentation

Read:

1. Market segmentation: Definition, types, benefits, & best practices. Retrieved from https://www.qualtrics.com/experience-management/brand/what-is-market-segmentation/

	Due: Group project - part 2 (final report) 35% In-class activities: Discussion on group project findings
Class 6	Term Test (25%) Due: course reflection (10%)

Statement from University Librarian Certifying Adequate Library Resources to Support the Course:
Attached

Schulich
School of Business
York University

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

20. Instructors and Faculty Coordinator

Initial instructor: Hemant Sangwan

Alternative instructors:

Course coordinator:

21. Specializations

Primary area or specialization: OMIS

Secondary areas or specializations: None

22. Student Contact and Enrolment

Contact hours: 18 hours

Maximum enrolment: Core Course = 55

Expected enrolment: 50

Evidence for enrolment expectations: This is a required course in the TechMBA. Enrollment in the TechMBA is showing steady growth.

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

a. The discussion on data and modeling topics will also include topics related to fairness, accessibility, privacy, and ethical use of data and algorithms. In addition, students have an opportunity to reflect on DEDI for their group project and individual assignment – course reflection.

24. Human Participants Research: N/A

25. Conditions for Approval

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

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

Specify the course or courses being deleted.

b) Provide a convincing case for the proposed course.
State the reason the program needs this new course and provide evidence that the Area has no elective with student enrolments low enough to warrant deletion. Approval from the ADA will be required.

Originator:

Hemant Sangwan	March 8th, 2025
Signature	Date
Hemant Sangwan	MBAN / MMAI
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.

Murat Kristal	OMIS
Guangrui Kayla Li	OMIS
Isik Bicer	OMIS
Vibhuti Dhingra	OMIS
Henry M. Kim	OMIS
Markus Biehl	OMIS

Approvals

Area or Specialization: OMIS
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.

Schulich
School of Business
York University

	March 8th, 2025
Signature	Date
Dr Murat Kristal	OMIS
Name of Coordinator or Director	Area or Specialization

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

Signature	Date
Name of Program Director	Program

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

Kevin Tasa	November 20, 2025
Signature	Date
Kevin Tasa	Master Programs Committee
Name of Committee Chair	Committee

OMIS 5310 1.50: Data Analytics for Business Leaders

Course Outline

Winter 2027

Wednesdays: 2:30 – 5:30pm, starting w/o Jan 4th

Room: SSB XYZ, Schulich School of Business

Instructor
Hemant Sangwan, Sessional Lecturer, YorkU
Email: hsangwan@schulich.yorku.ca
LinkedIn: https://ca.linkedin.com/in/hemant-sangwan
Office hours: online, by appointment

Assistant
Stephanie Allen
Email: sallen@schulich.yorku.ca

Instructor

Hemant Sangwan is a seasoned educator, currently serving as a full-time professor at Seneca Polytechnic in Toronto, Canada. His teaching portfolio spans across various disciplines (**AI, data science / ML, statistics, Python programming, economics, marketing research, and strategy)**, at prestigious institutions such as Schulich School of Business, York University; Rotman School of Management, University of Toronto; and Questrom School of Business, Boston University. He also leads and guides business delegates with executive education modules in the above-mentioned topics.

With over 12 years of industry experience, including roles at prestigious firms such as Boston Consulting Group (BCG), GfK Canada, and IHS Markit, Hemant has sharpened his skills in management consulting, data science, analytics, marketing research, and economic forecasting. His expertise in problem formulation, project management, and data interpretation has been instrumental in delivering tailored solutions to clients across diverse sectors, both domestically and internationally. He is a co-founder and director of HS Advisory Inc., a boutique business-consulting firm, which assists clients in navigating complex business landscapes in the areas of AI, data science, survey research, digital marketing, brand communication, and marketing strategy.

Hemant holds a **PhD in Management** from Rotman School of Management, University of Toronto, and an **MS in Quantitative Economics** from the Indian Statistical Institute, New Delhi.

In addition to his professional endeavors, Hemant has been actively engaged in volunteer work. He is an educational consultant with Academics without Border (AWB) and has served as a strategist and finance manager for political campaigns in municipal and federal elections in Canada.

Brief Description

Prerequisites/Corequisites/Course Exclusions: None

In this course, students will learn both the "art", (i.e., conceptual side of data and analytics), and the "science" side of modeling and data-based decision making. This course will introduce students to core elements of data, analytics, and modeling as well as the skills needed to make intelligent use of data in decision making related to business functions and strategies. The key topics include **basic data analysis, descriptive and predictive analytics, classification and regression modeling, decision trees (CARTs) and managing business analytical plans**. In addition, **Python programming** will be the foundation for applying hands-on skills in data analysis and modeling.

In today's time, organizations (public, private, not-for-profit, etc.) have been collecting large amounts of data to help them in making important business and public policy decisions. Examples include retail transactions data, which keeps track of customers' purchase histories, loyalty-program data monitoring purchasing under different promotional environments, social network and online shopping history data, traffic video footage data, crime data, etc. In addition, the decision-making processes are getting increasingly complex, sophisticated, and competitive across these organizations.

In this context, successful business planning and strategy involve processing and analyzing data which can help in evaluating the impacts of business decisions on key metrics (e.g., sales, profit, customer experience, etc.) and thereby complementing the "intuitive" elements of decision making.

At the end of the course, students are expected to develop (or enhance) strong foundations in data-based modeling and decision-making skills.

Contents

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Course Learning Outcomes

Successful completion of this course will enable the student to:

- Learn basic concepts in data measurement, central tendency, structured and unstructured data
- Examine and summarize data (numerically and visually) using exploratory and descriptive analytics techniques
- Describe applications of business analytics and modeling in decision making to improve KPIs
- Apply modeling techniques (e.g., linear regression, logistic regression, decision-trees, clustering and segmentation, etc.) to solve specific business and decision-making problems
- Evaluate competing analytical models using technical and business criteria (KPIs)
- Explain analytics project lifecycle and its different components using the most relevant industry frameworks to improve project efficiency and outcomes
- Discuss the importance of ethics, privacy, and data governance in achieving analytics success and overcoming challenges related to data and digital transformation

Deliverables at a Glance

Assignment/Task	Quantity	Weight %	Total %	Type	Due Date
DataCamp Modules	5	3%	15%	Individual	Ongoing (to be completed by w/o # 4)
Term test 1 (MC and/or TF and/or, short answer questions)	1	25%	25%	individual	w/o # 6
Group project – part 1 (proposal)	1	10%	15%	Group	w/o # 2
Group project – part 2 (final report)	1	25%	35%	Group	w/o # 5
Course reflection / discussion board (ongoing)	1	10%	10%	Individual	w/o # 6
			100%		

For details, see “Written Assignments/Projects Descriptions” (p. 6) and “Evaluation of Written Assignments/Projects” (p. 9).

Course Material

The course materials and contents will be a combination of lectures, cases, business articles from reliable sources on the internet (e.g. Business Insider, Forbes, etc.) and "hands-on" exercises using Python.

Required Textbook: None

Optional

- Shmueli, G, Bruce, P et al (2020). *Data Mining for Business Analytics*. Wiley, ISBN 9781119549840 (DMB)

- Exploratory Data Analysis with Excel – YouTube Playlist by David Langer https://youtube.com/playlist?list=PLTJTBoU5HOCRFQhfU1gg2ciNpS_evWKR7

- Data Mining with Excel – YouTube Playlist by David Langer. Retrieved from https://youtu.be/6_aFa977sfI?si=q8A1-maHxyhNnOS6

- Princeton AI and Ethics. Retrieved from https://aiethics.princeton.edu/case-studies/case-study-pdfs/

- MIT Technology Review: https://www.technologyreview.com/

- Quanta Magazine. Retrieved from https://www.quantamagazine.org/

Student Preparation for Class and Class Participation: Expectations

The value of class sessions depends greatly on student involvement and input. The class discussion will be a combination of conceptual discussions, demonstration of applications for ML/ AI techniques, discussion on specific readings and case studies, and breakout room activities. Students are expected to be prepared for each session by completing assigned readings, and by actively participating in class discussion (both voluntarily and when called upon to do so) and online discussion groups. Students should follow the materials on a weekly basis and keep up with the important announcements as they are posted on LMS (i.e., Canvas).

Important: **Late assignments are <u>not accepted</u>.** A late assignment will result in a zero for that assignment. There is no way to make up for a missed assignment. I do not offer additional assignments or extra work in lieu of a missed assignment. Given these facts, please pay close attention to deadlines. Please upload all assignments on Canvas.

Class-by-Class Syllabus

Topics, readings, and assessments for every class are listed below.

Class 1 Introduction to the concepts of data and programming (measurement, structured vs. unstructured data, Python)

Read (or watch):

1. Structured vs unstructured data: what's the difference? IBM article https://www.ibm.com/think/topics/structured-vs-unstructured-data
2. Describing a dataset. Anil Doshi. Retrieved from https://www.scribd.com/document/495644797/How-to-Describe-a-Data-Set
3. What is CRISP-DM (Cross Industry Process for Data Mining). Retrieved from https://www.datascience-pm.com/crisp-dm-2/
4. Cross Industry Process for Data Mining (CRISP-DM). Retrieved from https://youtu.be/G2wpQ0i3qt8?si=8uox1OxKSXBZODek
5. Setup Python (Google Colab – Preferred): Google Colab Tutorial for Beginners (10 minutes): https://youtu.be/RLYoEyIHL6A?si=1hWBje6Et2rWMW9z

Optional:

1. Amount of Data Created Daily (2024). Retrieved from https://explodingtopics.com/blog/data-generated-per-day#how-much
2. Types of Data & Measurement Scales: Nominal, Ordinal, Interval and Ratio. Retrieved from https://www.mymarketresearchmethods.com/types-of-data-nominal-ordinal-interval-ratio/

In-class activities: setting up Python using Google Colab, signing up for DataCamp, finalizing groups

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Class 2 Introduction to analytical models and decision making
Linear regression

Read:

1. Using Decisions in Framing Analytics Problems: A Consulting Perspective - DataEDGE 2015 (25 minutes): https://youtu.be/B_gbR6Tj5ss
2. Overview - Predictive analytics – IBM. Retrieved from https://www.ibm.com/analytics/predictive-analytics
3. Problem-Solving With Algorithms (Amy Pirzada, 2021). Retrieved from https://www.mycodingplace.com/post/problem-solving-with-algorithms

Optional:

1. Algorithmic Thinking. Retrieved from https://teachinglondoncomputing.org/resources/developing-computational-thinking/algorithmic-thinking/
2. How to Develop Algorithmic Thinking in Data Structures and Algorithms? Retrieved from https://www.enjoyalgorithms.com/blog/how-to-develop-algorithmic-thinking-in-data-structure-and-algorithms
3. What is Predictive Analytics-5 Examples. Retrieved from https://online.hbs.edu/blog/post/predictive-analytics

Due: Group project- part 1 (proposal) 15%

Class 3 Logistic regression

Read:

1. Sofia Ciocca (2017). How Does Spotify Know You So Well? (2019). Retrieved from https://medium.com/s/story/spotifys-discover-weekly-how-machine-learning-finds-your-new-music-19a41ab76efe

2. How companies use personal data to charge different people different prices for the same product. Retrieved from https://www.cbc.ca/news/business/marketplace-online-prices-profiles-1.4414240

Class 4 Classification and Regression trees (CART, Decision trees)

Read:

1. Decision Trees. Retrieved from https://scikit-learn.org/stable/modules/tree.html
2. Recommendation Engine. Retrieved from https://blog.dataiku.com/recommendation-engines-how-they-work-in-plain-english

Due: Data Camp modules 15%

Class 5 Clustering analysis and segmentation

Read:

1. Market segmentation: Definition, types, benefits, & best practices. Retrieved from https://www.qualtrics.com/experience-management/brand/what-is-market-segmentation/

Due: Group project - part 2 (final report) 35%
In-class activities: Discussion on group project findings

Class 6 Term Test (25%)

Due: course reflection (10%)

Written Assignments/Projects and Exam[s]: Descriptions

Submission instructions: Please submit all assignments on Canvas as per the due date indicated on Canvas. Emailed assignments will not be accepted. Late assignments will not be accepted.

Individual Assignment (DataCamp Modules, 15%): Ongoing, and all modules must be completed by week 4

There will be a set of online modules on select topics (e.g., methodology, programming, etc.) scheduled via the DataCamp platform. The modules will require students to read/watch content on a specific topic

(e.g., linear regression, etc.) and then write short codes, filling in for missing codes, or answer a set of MC / short answer questions related to programing and methodology. The DataCamp platform can be **freely** accessed for these exercises during the timeline of this course. Students are expected to work on these modules in a gradual manner and not leave everything to the last minute.

Once a module is completed, the platform will provide a certificate of completion – indicating the name of the student, and the date of completion.

Students must submit ALL certificates of completion, combined as a single file, on LMS by the due date as proof of completing the modules. No other proof will be accepted.

- The instructor will send an email invitation to students to join the platform at the beginning of the course.
- Students need to create an account with DataCamp using the invitation sent by the instructor.
- Once the account is created, students will have access to DataCamp portal to complete these modules.
- The DataCamp platform is freely available to complete these modules during the timeline of this course.

Individual Assignment (Course reflection + discussion board, 10%): Ongoing, and course reflection must be completed by week 6

Students need to submit a course reflection assignment, on canvas, during week 6, in which they need to discuss key learnings from the course, their experience with completing course related activities (in-class, and online discussion board), and if they completed these activities in a gradual timely manner or all at once!

For discussion board, there will be topics for certain weeks where students need to write their point of views (PoVs) on a given topic. The topic could be related to analytics / decision-making / methodology, and the PoVs should reflect your position on the given topic and/or suggestions to a specific problem, and not a Yes/No type of response. The objectives of the discussion board topic are to learn from each other's PoV, develop critical thinking, and take a position on a given topic based on logic, knowledge, and personal preferences. The PoVs are not "right" or "wrong" and present an opportunity to show creativity, analysis, and ability to critically examine a situation and ask meaningful questions.

Note: Individual discussion board topics **will not be actively monitored by the instructor**. The course reflection document **will be tracked and graded** (10% of the total wight). In the course reflection, students need to write about their experience and key learning, etc. and

Individual term test (25%): Due – week 6

There will be a term test, worth 25% of the total weight of the course. The test will be in the form of (multiple choice and/or T-F and/or short answer questions) and will be conducted via Canvas. The test will be of limited duration (e.g., 60 minutes, 90 minutes, etc.) and must be taken during the class time. Specific details will be provided in advance during the class discussion/ and will also be posted on Canvas.

Students are not expected to consult with each other or take external help regarding the questions and concepts that appeared in the test.

Group Project (Part 1 and 2, overall, 50%):

Students will form groups of four to six people and complete a group project assignment. There will be two parts for the group assignment – part 1 (proposal, 15%) and part 2 (final report, 35%). In the group project, students will collaborate with others to learn, discuss, and come up with specific solutions and recommendations to a set of business problems involving data science and analytics techniques discussed in the course. The groups will be formed based on mutual consensus among students and/or the instructor can also advise about the same.

The data / materials / articles used for group projects can be sourced/suggested by students and / or provided by the instructor. In all cases, the students need to take a formal/informal approval from the instructor before finalizing data and start working on the project. Additional details/ specific information about each part will be discussed during the class/ and will also be posted on Canvas well in advance.

- Group project – part 1 (proposal, 15%): In this part students will analyze the business situation to formulate the problem, finalize key objectives and propose a plan to meet the business objectives (PPTX format) **(Due: week 2)**

- Group project – part 2 (final report, 35%): In this part, students will execute the plan proposed in part 1 based on authentic research and analysis, present the findings, and provide key recommendations to the stakeholders in a form of a professional business report (PPTX format) **(Due: week 5)**

- Peer Assessments**:** As part of the group project, you (individual and confidential) may need to submit a form describing contributions of each team member (including yours), overall experience working with the team, and highlight any area for improvement in the future. In addition, you need to communicate with the instructor, in a timely manner any concerns which can negatively affect the timeline/overall experience of working in the group.

- The expectation is each member in the group will contribute their fair share to the best of their abilities and not engage in "free riding" behaviour. It is perfectly fine to have differences with you team members on ideas, working plans, etc. and you need to manage those differences based on mutual discussion with your team members in a professional manner. **The instructor will not micromanage day-to-day operational issues of working in the group project. However, if there is credible evidence that a member is completely missing from the work or making marginal or not meaningful contribution to the group work, it will reflect in grades for that member.**

Evaluation of Written Assignments/Projects and Exams

Late assignments are <u>not accepted</u>. A late assignment will result in a zero for that assignment. There is no way to make up for a missed assignment. I do not offer additional assignments or extra work in lieu of a missed assignment. Given these facts, please pay close attention to deadlines. Please upload all assignments on Canvas.

Calculation of Course Grade

In this class, final course grades will be determined by the following process: Students' final mark will be derived by weighting each grading component according to the proportions described above. Grades will be converted using the following scale:

GRADE	GRADE POINT	PERCENTAGE	DESCRIPTION
A+	9	≥91-100	Exceptional
A	8	≥86-90	Excellent
A-	7	≥80-85	Very Good
B+	6	≥75-79	Good
B	5	≥70-74	Competent
B-	4	≥65-69	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 your student handbook.

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

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

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

Quick Reference: Summary of Classes, Activities and Deliverables

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)	Assignment Due
Class 1 • Introduction to the concepts of data and programming (measurement, structured vs. unstructured data, Python) • Managing analytical projects using a framework	• Finalize groups • Setup Python using Google Colab • DataCamp signup	• Structured vs unstructured data: what's the difference? IBM article https://www.ibm.com/think/topics/structured-vs-unstructured-data • Describing a dataset. Anil Doshi. Retrieved from https://www.scribd.com/document/495644797/How-to-Describe-a-Data-Set • What is CRISP-DM (Cross Industry Process for Data Mining). Retrieved from https://www.datascience-pm.com/crisp-dm-2/ • Cross Industry Process for Data Mining (CRISP-DM). Retrieved from https://youtu.be/G2wpQ0i3qt8?si=8uox1OxKSXBZODek	
Class 2 • Introduction to analytical models (supervised vs unsupervised) • Linear regression and predictions	• Applying linear regression technique using Python	• Using Decisions in Framing Analytics Problems: A Consulting Perspective - DataEDGE 2015 (25 minutes): https://youtu.be/B_gbR6Tj5ss • Overview - Predictive analytics – IBM. Retrieved from https://www.ibm.com/analytics/predictive-analytics • Problem-Solving With Algorithms (Amy Pirzada, 2021). Retrieved from https://www.mycodingplace.com/post/problem-solving-with-algorithms	Group project – Part 1 (proposal) 15%
Class 3 • Logistic regression and modeling choice behaviour (e.g., choice decisions, individual targeting, etc.)	• Applying logistic regression using Python	• Sofia Ciocca (2017). How Does Spotify Know You So Well? (2019). Retrieved from https://medium.com/s/story/spotifys-discover-weekly-how-machine-learning-finds-your-new-music-19a41ab76efe • How companies use personal data to charge different people different prices for the same product. Retrieved from https://www.cbc.ca/news/business/marketplace-online-prices-profiles-1.4414240	
Class 4 • Classification and Regression Trees CART (i.e., Decision Trees)	• Applying decision tree techniques using Python	• Decision Trees. Retrieved from https://scikit-learn.org/stable/modules/tree.html • Recommendation Engine. Retrieved from https://blog.dataiku.com/recommendation-engines-how-they-work-in-plain-english	DataCamp modules (15%)

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)	Assignment Due
Class 5 • Clustering analysis and segmentation	• Applying clustering technique using Python • Each group will discuss their group project final report	• Market segmentation: Definition, types, benefits, & best practices. Retrieved from https://www.qualtrics.com/experience-management/brand/what-is-market-segmentation/	Group project – part 2 (final report) 35%
Class 6 • Term Test (25%)			Term Test (25%) Course reflection (10%)

SUBJECT: Library Statement for OMIS 5310: Data Analytics for Business Leaders
FROM: Angie Liann, Teaching & Learning Librarian / Business Liaison Librarian
DATE: June 16, 2025

OMIS 5310: Data Analytics for Business Leaders

York University Libraries (YUL) will be able to support the proposed course, OMIS 5310: Data Analytics for Business Leaders. In this course, students will learn both the "art", (i.e., conceptual side of data and analytics), and the "science" side of modeling and data-based decision making. YUL has a strong collection of electronic and print periodicals, books, and databases that will help students conduct secondary research for this course.

All the course materials can be accessed through the YUL's Omni search interface. It is recommended to place the textbooks and readings on reserve via the online reserves request form. YUL has an extensive collection of print and eBooks on the course topics.

YUL's Omni search interface can be used to locate scholarly, trade, and newspaper articles. Students may consult the Omni search guide for tips on using this discovery layer to find relevant articles. *Proquest Business* and *Business Source Complete (BSC)* are two core databases that provide subject-specific scholarly and trade business article publications. *Factiva* and *Nexis Uni* are two excellent databases that provide access to thousands of business news publications.

Students will have access to key business databases such a*s Capital IQ; Passport; Statista; IBISworld;* and *Marketline Advantage.* A complete list of YUL's business databases can be viewed at Business Resources A-Z. Additional information on relevant article databases can be located on YUL's Business Articles guide,

Students are encouraged to learn more about various databases the library subscribes to by consulting YUL's well-developed and curated research guides and Step-by-Step Business Research Tutorials. These guides and tutorials list librarians' recommended resources for most asked research tasks.

Students will have access to research help and consultation services both in-person and online. Students have the options to visit the reference desk at Peter F. Bronfman Business library, send an email to bronfref@yorku.ca, use the online chat service, or book a Zoom consultation with a business librarian.

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 Technology MBA Program

2. Responsible Unit:
OMIS

3. Subject Code (Rubric) and Course Number:
OMIS 5311

4. Credit Value:
1.50

5. Long Course Title: Enterprise Risk Management

6. Short Course Title:
Enterprise & IT Risk Mgmt

7. Effective Term/Calendar Year:
Winter 2027

8. Language of Instruction:
English

9. Calendar (Short) Course Description:
This course provides a comprehensive overview of risk management principles, practices, and tools. Students will learn to identify, assess, and prioritize risks, and develop strategies to mitigate and manage them. Technology risk management is a key tool in a technology leader's toolbox to ensure decisions are aligned with business outcomes and risk appetite. Students will learn about the multi-faceted world of technology risk and its impact on financial (including credit, market, liquidity risks) and non-financial (including operational, regulatory, strategic risks).
(Prerequisite not required)

Schulich
School of Business
York University

10. Expanded Course Description:
In today's dynamic and complex business environment, effective risk management is essential for organizational success. This course provides a comprehensive overview of risk management principles, practices, and tools. Students will learn to identify, assess, and prioritize risks, and develop strategies to mitigate and manage them.
The course will also dive into Technology Risk, including cyber security, managing risk with emerging technologies (including embedding GenAI in business use cases) as well as risks and benefits of moving away from an aging technology infrastructure stack.

Key Topics:
- Introduction to Enterprise Risk Management
- Risk Management frameworks
- Enterprise Risk Identification and Assessment
- Risk Response Planning, Monitoring and Control
- Technology Risk Management – cyber security, and emerging technology risks
- Tying technology risk management to business objectives
- Regulatory and Compliance Issues
- Case Studies and Real-World Applications

11. Course Learning Outcomes:
1. Understand the fundamental concepts of enterprise and technology risk management.
2. Identify and assess various types of risks in different contexts.
3. Gain a broad understanding of risk management frameworks and the Canadian and international regulatory requirements for technology risk management
4. Develop leadership skills using their knowledge of technology risk and the importance of maintaining the balance between risk appetite and business value drivers.

12. Rationale:

The Enterprise Risk Management course will be a key part of the curriculum in the Technology MBA program by introducing students to the concept of risk management, highlighting this area as an important contributor in enabling business strategies and meeting objectives. This course will complement the following courses within the program:
- SB/OMIS 5100 3.00 Emerging Technologies and the Changing Landscape of Business: Identifying, assessing and managing risk of new technologies to business operations ensuring strategic objectives are met

- SB/ACTG 5201 3.00 Financial Reporting and Control in Technology Firms: Financial controls and attestation for the Sarbanes Oxley Act (SOX) are part of the Technology risk governance and control program which will be covered in the Enterprise Risk Management course
- SB/ORGS 5201 3.00 Leading and Managing Digital Transformations: Enterprise Risk Management is an essential part of leading, managing and executing digital transformations in organization to manage potential adverse consequences.

13. Evaluation:

Individual Participation - Students will be expected to participate during class sessions with insights, opinions and questions.	**10%**
Individual Assignments - Students will be expected to outline the main types of Enterprise Risks in an organization and the potential impacts on strategy and business objectives.	**40%**
Group Assignment 1 – Introduction to Enterprise Risk Management – Case Study Students will be provided with a case study of a recent industry event, where they will be expected to: - Outline key risks that potentially led to the event - Potential mitigants - Highlighting other primary/secondary impacts of the risk event to the organization	**25%**
Group Assignment 2- Case Study (continued) Using the same case study from Group Assignment 1: Further details will be shared regarding the organization and key risk roles and responsibilities will be shared in the case. Students will be provided with risk role profiles and will have to portray risk identification, assessment, mitigation and monitoring strategies based on their roles. Key outcome will be to support the business in recovering from a risk incident and supporting future growth.	**25%** **(10% of the mark is for the presentation)**

14. Integrated Courses: N/A

15. Cross-listed Courses: N/A

16. Enrolment Notes:
This course will be offered to the MBA in Technology Leadership Program.

17. Faculty Resources:
Murat Kristal
Hira Shahzad

18. Physical Resources: Standard course delivery resources – screens for display of material
Regular classrooms as Schulich will be used

19. Bibliography and Library Statement:
Please see attached library statement

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

20. Instructors and Faculty Coordinator

Initial instructor:
Hira Shahzad

Alternative instructors:
Murat Kristal

Course coordinator:
Murat Kristal

21. Specializations

Primary area or specialization:
OMIS

Secondary areas or specializations:

22. Student Contact and Enrolment

Contact hours:
16.5

Maximum enrolment:
55

Expected enrolment:
30

Evidence for enrolment expectations:
The Tech MBA Program is a relatively new program. In its inaugural year the program had 14 students, and in its second year the Program has 21 students. There is a steady stream of increased enrollments for the Program.

23. Equity, Diversity, Inclusion, Decolonization and Indigenization Action Plan
We touch upon in these important subjects in classroom discussions, assignments, and in course materials.

24. Human Participants Research
"N/A".

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

a) **The Area is deleting courses with at least the same total number of credits.**
Specify the course or courses being deleted.

b) **Provide a convincing case for the proposed course.**
State the reason the program needs this new course and provide evidence that the Area has no elective with student enrolments low enough to warrant deletion. Approval from the ADA will be required.

Originator:

	March 1st 2025
Signature	Date
Hira Shahzad	OMIS
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.

Vibhuti Dhingra	OMIS
Markus Biehl	OMIS
David Johnston	OMIS
Isik Bicer	OMIS
Henry M. Kim	OMIS
Murat Kristal	OMIS

Approvals

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

_____ March 1st, 2025
Signature Date

Henry Kim OMIS
Name of Coordinator or Director Area or Specialization

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

Schulich
School of Business
York University

_____	March 1st, 2025
Signature	Date
Murat Kristal	MBA in Technology Leadership
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	November 20, 2025	Signature
Date		
Kevin Tasa	Master Programs Committee	
Name of Committee Chair	Committee	

OMIS 5311 1.5: Enterprise Risk Management

Course Outline
<Winter> <2027>

<Class day[s]>, <Time>, beginning on <month/day>
<Class location>
<Lab day>, <Time> (if applicable)
<Lab location> (if applicable)

Instructor
<Hira Shahzad>
<Office location (e.g., N100, Seymour Schulich Building)>
<Phone (use Area or support staff number)>
<E-mail>
Office hours: <Day[s], Time[s]>, <whether an appointment is required>

Assistant
<Name>
<Office>
<Phone>
<E-mail>

<Brief bio/interests of instructor (max 3 lines suggested)>

Hira Shahzad is an experienced risk management professional starting her career in banking and moving into risk management with the federal regulator, Office of the Superintendent of Financial Institutions. She has held various roles in risk management throughout her career and is passionate about the value of risk management to the organization and its stakeholders. Her recent experience in Technology Risk, Governance and Controls incorporates a multi-disciplinary approach to risk, including operational, regulatory, cyber security and privacy risk.

Brief Description
<Verbatim from Student Handbook>
This course provides a comprehensive overview of risk management principles, practices, and tools. Students will learn to identify, assess, and prioritize risks, and develop strategies to mitigate and manage them. Technology risk management is a key tool in a technology leader's toolbox to ensure decisions are aligned with business outcomes and risk appetite. Students will learn about the multi-faceted world of technology risk and its impact on financial (including credit, market, liquidity risks) and non-financial (including operational, regulatory, strategic risks).

Prerequisites/Corequisites/Course Exclusions: <N/A>

Contents
<Note (to be deleted): to update pg. numbers, right click on any heading below & select "Update Field">
Course Learning Outcomes 2

Deliverables at a Glance 3
Course Material 3
Student Preparation for Class and Class Participation: Expectations 4
Class-by-Class Syllabus 4
Written Assignments/Projects and Exam[s]: Descriptions 5
Evaluation of Written Assignments/Projects and Exams 7
Calculation of Course Grade 8
General Academic Policies: Grading, Academic Honesty, Accommodations and Exams 8
Quick Reference: Summary of Classes, Activities and Deliverables 9

<Note (to be deleted): If this course has no exams, delete "exams" from the three headings above and the text, and omit the academic policy on examinations.>

Course Learning Outcomes

<Insert an expanded statement of purpose that includes expected learning outcomes for the course. Learning outcomes may pertain to depth and breadth of knowledge, understanding of methodologies, abilities in application and/or communication skills. For more guidance, see program-level learning outcomes.>

This course will prepare students in understanding and anticipating risks with existing and emerging technologies as well. The focus of this course will be to develop the next generation of technology leadership by bringing technical knowledge, risk management and business value together.
Through the readings and discussions in class, students will be able to develop an understanding of the interconnectedness of technology risk with all other risk categories. Prior knowledge of risk management is not necessary; however, an interest and knowledge of industry events related to risk will be encouraged throughout the course.

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

1. Understand the fundamental concepts of enterprise and technology risk management.
   1.1 Introduction to the definition of risk and risk management
   1.2 Introduction to the concept of enterprise risk management, governance, risk and control requirements such as policy setting, risk appetite, appropriate decision-making structures and reporting structures for independence of risk management functions
2. Identify and assess various types of risks in different contexts.
   2.1 Introduction and review of financial and non-financial risk categories
   2.2 Deep dive into technology risk: cyber security, risks in management of current state and new technology builds utilizing emerging technology, interconnectedness with other risk types
3. Gain a broad understanding of risk management frameworks and the Canadian and international regulatory requirements for technology risk management
   3.1 Review of risk management frameworks and the implementation of these frameworks in technology – e.g. NIST, COBIT, COSO
   3.2 Introduction to Canadian and international regulatory requirements for technology and cyber security risk management
4. Develop leadership skills using their knowledge of technology risk and the importance of maintaining the balance between risk appetite and business value drivers.
   4.1 Leverage data to balance risk mitigation and investment decisions with business growth
   4.2 Creating a risk strategy aligning with the business

Deliverables at a Glance

<Comment on course requirements contributing to final evaluation. Indicate whether the work is to be done by a group or each student individually.> 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
Individual Participation	1	10	10	Individual
Individual Assignments	1	40	50	Individual
Group Assignment 1	1	25	75	Group
Group Assignment 2 – Case Study (continued) - Group presentation to class	1	25	100	Group
			100%	

For details, see "Written Assignments/Projects and Exam[s]: Descriptions" (p. <7>) and "Evaluation …" (p. <7>).

Course Material

<Describe the principal material for the course (e.g., textbook, course kit, CMD), including where students may obtain it, and comment on its use (e.g., required vs. recommended). If no textbook is required for this course, please say so explicitly. For example: "Reading material for the course has been organized in three main locations … Not every source is needed for each class. Every week, you should check the Session-by-Session Syllabus below for readings and their locations (see pp. <XX-XX>).>

Required reading for this course includes the following book[s]. It is (They are) available for purchase from the York University Bookstore (http://bookstore.blog.yorku.ca):
Along with the course readings, articles will also be provided and students will be asked to bring insights based on those articles and course readings to gain their participation mark.

1. John R. S. Fraser, Enterprise Risk Management: Today's Leading Research and Best Practices for Tomorrow's Executives, Wiley, 2nd Edition/2021
2. David Sutton, Information Risk Management: A practitioner's guide, BCS the Chartered Institute for IT, 2nd Edition/2021

Reference Material includes:

- COBIT framework material from the ISACA website
- COSO framework material
- Introduction to the NIST framework
- FAIR Methodology
- OSFI B-13
- Case studies: Source: Harvard Business Publishing - Education
    - Nvidia, Inc. in 2024 and the Future of AI
    - FedEx Cyberattack: Reflections and Lessons
    - Domino's Pizza: Digital Transformation in the Pizza Industry
    - Leading Through Influence at Scale: Open Source Security at the Linux Foundation
    - Mircom Technologies Ltd. (A): Responding To A Ransomware Attack

Course kits are available for purchase from the York University Bookstore.

Reserved readings at the library have been selected from periodicals and journals. Go to http://www.library.yorku.ca, click on the "Reserves" tab and type in "<Course Code>" to access these readings.

The *Course Materials Database (CMD)* has been created within Schulich's Lotus Notes. It contains general information for Schulich students and information and materials specific to this course. Check it frequently.

Student Preparation for Class and Class Participation: Expectations

<Include details as appropriate. N.B.: Students appreciate explicit guidance on the amount and type of pre-class preparation expected by an instructor.>

Preparation. Chapter readings and reference material readings should be complete.

***Class Participation (contribution)*.** Insightful questions and comments will be welcome from students. This includes examples of real risk events that have impacted organizations around us and what we have learnt from those events.

Class-by-Class Syllabus

<Provide a general orientation as appropriate. For example, if the course is organized into modules, identify the modules. If each class follows a standard format—or not—note that here. >

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

> Note: If any changes in this schedule become necessary, notifications will be posted on the course CMD, and when changes need to be announced between classes, an email will be sent to students' Lotus Notes email accounts, notifying them of the change.

<TBD>
<(Session 1)>

<u>Introduction to enterprise and information technology risk management</u>

Prep: Research the definition of enterprise risk

Read:

1. ERM, John Fraser – Part I: Overview and Drivers of ERM, and Part II: Risk management, culture and control
2. IRM, David Sutton: Ch 1. Need for IRM

Introducing Individual and Group Assignments, mark breakdown and grading.

Assignment Due: None

<session date> <(Session 2)> <u>Overview of risk types (financial, non-financial) – Deeper dive into Information Technology Risk Management risk taxonomy</u>

Prep:

- What are the types of financial and non-financial risks?
- What are the various risk categories within information technology risk management?

Read:

1. ERM, John Fraser: Part IV Types of Risk
2. IRM, David Sutton: Ch 2. Review of Info Sec fundamentals, Ch 3. The IRM Program

Assignment Due:

- Individual Assignment A

<session date> <(3)> Topic: Risk Management: Identification, Assessment and Management

Prep:

- Think about the question: how are risks identified? What is the impact of a control and how do we assess its effectiveness?

Read:

1. ERM, John Fraser: Part III Tools and Techniques
2. IRM, David Sutton: Ch 4 Risk Identification, Ch 5 Threat and Vulnerability Assessment, Ch 6 Risk Analysis and Evaluation
3. Case study: FedEx Cyber Attack

Optional:

- NIST framework
- FAIR Framework

Assignment Due:
Group Assignment 1 due

<session date> <(4)> Topic: Risk Management: Identification, Assessment and Management (Continued) + The regulatory environment

Prep: How does technology impact the rest of the business and its ability to continue operations? Research the concept of resilient technology design.

Read:

1. IRM, David Sutton: Ch 7 Risk treatment, Ch 8, Risk Reporting and presentation

2. Case Study: Mircom Technologies Ltd. (A): Responding To A Ransomware Attack

Optional:
- COBIT Framework
- OSFI B-13

Assignment Due: None

<session date> <(5)>

Topic: Leading with Risk: Managing the balance between risk management and business growth

Prep:
- Bring examples from any industry highlighting the impact of technology strategy and risk decisions on business value
-

Read Cases
- Domino's Pizza: Digital Transformation in the Pizza Industry
- Leading Through Influence at Scale: Open Source Security at the Linux Foundation
- Nvidia, Inc. in 2024 and the Future of AI

Assignment Due:
- Individual Assignment B

<session date> <(6)>

Topic: Group Presentations

Prep: N/A

Read: None

Assignment Due:
Group Assignment B: Report due and in-class group presentations

Written Assignments/Projects and Exam[s]: Descriptions

Please complete the assignments below in the formats described.

Due Date

<session 2> <u>Individual Assignment A:</u>

Due Date

- Which 3 risk types are most important to identify, assess and manage in your opinion and why? Share your views in class.

Max length: 2 slides
Value: 10%

<session 3> <u>Group Assignment 1 due: Introduction to Enterprise Risk Management</u>

Fictional case study created for this course - Further details of this case study will be released in this session for Group Assignment B.
The case provided will be highlighting the need of enterprise risk management and governance structures in an organization for effective identification, assessment and escalation of risk to the appropriate stakeholders.
Details on potential technology risks will be provided to students to identify and assess the risk probability and impact.

- Create a short presentation on the key financial and non-financial (including technology) risks that the organization should prioritize for its business objectives.

Max length: 5 slides
Value: 20%

<session 5> <u>Individual Assignment B:</u>

Risk in the news! Bring an article related to this course on enterprise and information risk management. Share your insights on what were the main risks that the organization was dealing with and what was the outcome?
Max length: 3-4 slides
Value: 20%

<session 6> <u>Group Assignment 2:</u>

Fictional case study continued: Create a presentation on

- Identify and assess Key risks and controls for information technology, regulatory and strategic risks (other relevant risk types can be added as well)
- Identify root cause for the specific incident mentioned in the case study
- Recommendations for senior management re: organization structure, risk mitigation activities and impact on business strategies

Max length: 10-15 slides
Value: 40%

Evaluation of Written Assignments/Projects and Exams

<Include details as appropriate, including quality criteria, the weights (importance) assigned to different sections of an assignment if they are not equal, and treatment of late submissions (e.g., not accepted, a specified penalty for each day late, or …).>

- Answering Assignment Questions:
  1.3 Basic answer: 60 – 70%
  1.4 Intermediate: 70 - 79%
  1.5 Advanced: 80% and above
- For Group Assignments:

1.6 Important to demonstrate participation by each team member – group evaluation will be included
1.7 Connecting risk management to business objectives will be key
1.8 For Group Assignment 2: A group presentation will be required to be made to the class highlighting results from Group Assignment 1 and 2.

- Late submission: 5% deduced for each day late

Calculation of Course Grade

In this class, final course grades will be determined by the following process: *<Spell out how course grades will be computed and assigned, particularly if numerical or percentage grades are used for assignments and exams during the term. The Schulich School does not have a standard policy for translating percentages into letter grades.>*

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

<Note (to be deleted): Keep/delete the program-specific and course-specific information below as appropriate. Take off highlighting for sections that are kept.>

<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. *<Note: For elective courses, replace the preceding sentence with:* To keep final grades comparable across courses, elective courses are expected to have a mean grade between 5.2 and 6.2.>

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

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

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

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

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

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

<Note: Keep/delete the sections below depending on whether or not this course has exams.>

Exams (Absence from)

Mid-term. Students who miss a mid-term examination must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file.

Final. Within 24 hours of missing a final examination, students must contact the (for Masters) Director of Student Services, (for Undergraduates) Associate Director, Undergraduate Programs Unit at (416) 736-5060 and must also contact their course instructor. Formal, original documentation regarding the reason for missing the exam must be submitted to the Director of Student Services, Associate Director, Undergraduate Programs Unit (SSB Room W262) within 48 hours of missing the final exam. Students who miss a final exam due to illness must have their doctor complete an "Attending Physician's Statement." For a copy of this document, visit:

http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf

Quick Reference: Summary of Classes, Activities and Deliverables

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)	Written Preparation
1. <Date> <Topic(s)>			
2. <Date> <Topic(s)>			
3. <Date> <Topic(s)>			
4. <Date> <Topic(s)>			
5. <Date> <Topic(s)>			
6. <Date> <Topic(s)>			
	NO CLASS (Reading Week)		
7. <Date> <Topic(s)>			
8. <Date> <Topic(s)>			
9. <Date> <Topic(s)>			
10. <Date> <Topic(s)>			
11. <Date> <Topic(s)>			

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)	Written Preparation
12. <Date> <Topic(s)>			

MEMORANDUM

York University Libraries

To: Murat Kristal, Director, MBA in Technology Leadership, Schulich School of Business

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

Date: March 5, 2025

Subject: Library Statement – OMIS 5311: Enterprise Risk Management

Summary

York University Libraries (YUL) is well positioned to support the proposed course which provides a comprehensive overview of risk management principles, practices, and tools. Students will learn to identify, assess, and prioritize risks, and develop strategies to mitigate and manage them. Technology risk management is a key tool in a technology leader's toolbox to ensure decisions are aligned with business outcomes and risk appetite. Students will learn about the multi-faceted world of technology risk and its impact on financial (including credit, market, liquidity risks) and non-financial (including operational, regulatory, strategic risks). Faculty and students can make use of an array of library resources and services to meet their research and learning needs. This statement highlights offerings related to the major themes of the course. It also brings attention to collections of interest from connected fields such as computer science and information technology.

Collections

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

- Risk management, Risk assessment, Risk perception, Security measures, Technology innovations, Business enterprise – Data processing, Financial risk management, Computer security, Credit derivatives, Liquidity (Economics) – Risk management, Operational risk, Compliance cost, Risk management – Decision making and Strategic planning etc.

The required textbooks listed in this course proposal and outline that are not currently in our collections will be ordered and added to our collections before the course is delivered. The Libraries will attempt to purchase e-books instead of print books, where possible. The required 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 that are freely accessible to students. It is recommended that the instructor use the Copyright Office's Course Reading List/Syllabus Review Service to ensure that the terms of use for the various materials allow for the content to be used in a course. Their staff can also assist in creating permanent links to library content, which can be embedded in Canvas for easy student access.

The Omni single-search interface provides students with access to a wide range of materials, including books, book chapters, articles, dissertations, streaming media, etc. Library users may also request items from partner libraries through Omni. Based on the librarian's review of class themes and weekly topics, a tailored selection of electronic databases of interest for this course are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings.

Core Business & Technology Publication Databases:

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

Core Company & Industry Research Databases:

- S&P Capital IQ
- Mergent Online
- Mergent Intellect
- PrivCo
- Sustainalytics
- Marketline Advantage
- IBISWorld
- Gartner Intraweb
- Statista
- FitchConnect
- Bloomberg

Newspaper/ Magazine Databases:

- Factiva
- Nexis Uni
- Press Reader

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.

Research Guides of Interest:

- Company Research Guide
- Industry Research Guide
- Information Technology Guide
- Computer Science Guide
- Step-by-Step Business Research Tutorials
- Business Citation Guide

Research Help

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

Accessibility Services

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

Schulich
School of Business
York University

New Course Proposal Form
Schulich School of Business

The following information is required for all new course proposals. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).
All new course proposals must include a library statement, course outline and motion document. Provide evidence of consultation, where appropriate.

1. **Responsible Program:** MBA in Technology Leadership

2. **Responsible Unit:** OMIS

3. **Subject Code (Rubric) and Course Number:** OMIS 5400

4. **Credit Value:** 1.50

5. **Long Course Title:** Business Intelligence with Database Applications

6. **Short Course Title:** BI with DB Applications

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

8. **Language of Instruction:** English

9. **Calendar (Short) Course Description:** This intensive 6-week course will help unlock business intelligence from organizational data sources including relational and NoSQL databases. Learn to leverage data assets, uncover key insights, and visualize information for strategic decisions

10. **Expanded Course Description:** Covering the fundamentals of business intelligence using databases, this intensive 6-week course will help unlock the power of data-driven decision making for a business focused audience. The participants will gain hands-on experience in building complete BI solutions, from database design (relational and NoSQL) to creating interactive dashboards and reports. The course will focus on helping participants develop practical skills in database development, data extraction, transformation, visualization as well as reporting. The participants will have an opportunity to utilize popular tools and technologies to transform raw data into actionable business insights.

11. **Course Learning Outcomes:** This course has five primary objectives which will be introduced in class lectures and reinforced through hands-on labs, assignments and

assigned readings. Through class lectures, assignments, and labs, participants will gain knowledge of business intelligence with database applications and be able to:

- Explain core Business Intelligence (BI) concepts including purpose and benefits of BI, components of a BI system, various types/classifications of BI as well as real world applications of BI
- Understand the respective strengths of and differences between relational and NoSQL databases
- Grasp the basic design principles of relational databases
- Utilize basic Structured Query Language (SQL) commands to query data
- Connect to various data sources, extract-transform-load (ETL) data and build dashboards/reports using popular tools and technologies like PostgreSQL as a relational database, mongoDB as a document store, Apache Nifi for ETL, and Apache Superset for data exploration/visualization.

12. Rationale:

The **MBA in Technology Leadership** aims to equip business professionals with the knowledge and technical expertise required to lead technology-driven organizations. The proposed **Business Intelligence with Database Applications** course aligns with these objectives by:

- Providing hands-on experience in managing and analyzing large datasets using relational and NoSQL databases.
- Teaching students how to extract insights from data and make strategic business decisions.
- Strengthening analytical skills through the use of business intelligence (BI) tools, database management, and data visualization.
- Enhancing students' ability to implement BI solutions using **SQL, PostgreSQL, MongoDB, Apache NiFi, and Apache Superset**—all essential for modern data-driven decision-making.

By bridging **technical database skills with business intelligence applications**, this course supports the **MBA in Technology Leadership's** emphasis on **data-driven leadership and strategic decision-making**.

13. Evaluation:

Deliverable	Quantity	Weight	Total	Author
Hands-on Lab Assignments	3	15%	45%	Individual
Project Proposal and Database Design	1	10%	10%	Groups of 5-7
Final BI Project	1	35%	35%	
Participation and discussion	1	10%	10%	Individual
Total			100%	

14. Integrated Courses:
N/A.

15. Cross-listed Courses:
N/A

16. Enrolment Notes:
This course will be offered for the MBA in Technology Leadership students.

17. Faculty Resources:
The course will be taught by Altay Aksulu, PhD. He is a graduate of the MBA and PhD Programs from Schulich School of Business. Alternate instructor is Henry Kim, Area Chair of the OMIS Area at the Schulich School of Business.

18. Physical Resources: Existing physical resources will be adequate for this course. The computing requirements for the course (e.g. virtual servers and application software) will be installed and configured by the initial instructor identified below and utilize either on-premise or IaaS type cloud resources.

19. Bibliography and Library Statement:
Please see attached

Schulich
School of Business
York University

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

20. **Instructors and Faculty Coordinator**

Initial instructor: Altay Aksulu, PhD

Alternative instructors:
Henry Kim

Course coordinator:
Henry Kim

21. Specializations

Primary area or specialization: OMIS

Secondary areas or specializations:

22. Student Contact and Enrolment

Contact hours:
16.5

Maximum enrolment:
55

Expected enrolment:
40

Evidence for enrolment expectations:
This course is part of Tech MBA detailed Minor program change. We are expecting the program to reach 40 students in the next couple of years.

23. Equity, Diversity, Inclusion, Decolonization and Indigenization Action Plan
DEI topics will be covered in the course where applicable.

24. **Human Participants Research:** *N/A.*

25. Conditions for Approval
This course is a part of detailed Minor modification for the Tech MBA program.

Originator:

Signature	Date

Adam Diamant	OMIS
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.

Guangrui Kayla Li	OMIS
Isik Bicer	OMIS
Vibhuti Dhingra	OMIS
Henry M. Kim	OMIS
Markus Biehl	OMIS
Murat Kristal	OMIS

Approvals

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

	March 11th, 2025
Signature	Date

Henry Kim	OMIS

Name of Coordinator or Director Area or Specialization

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

_____ March 11th, 2025
Signature Date

Murat Kristal MBA in Technology Leadership
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 November 20, 2025
Signature Date

Kevin Tasa Master Programs Committee
Name of Committee Chair Committee

OMIS 5400: 1.50 <Business Intelligence with Database Application

Business Intelligence with Database Applications

Course Outline
Winter 2027

Class time: TDB.
Class location: TBD.

Instructor	**Program Coordinator**
Altay Aksulu, BSc, MBA, PhD Email: aaksulu@schulich.yorku.ca Office hours: TBD (by appointment)	TBD.

Contents

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Instructor Bio

Altay Aksulu, BSc, MBA, PhD

Dr. Aksulu brings over 30 years of professional experience in managing complex IT projects and data-driven solutions, combined with extensive academic experience teaching undergraduate and graduate courses. His expertise makes him highly qualified to lead this introductory course on business intelligence and database applications.

Brief Description

Covering the fundamentals of business intelligence using databases, this intensive 6-week course will help unlock the power of data-driven decision making for a business focused audience. The participants will gain hands-on experience in building complete BI solutions, from database design (relational and NoSQL) to creating interactive dashboards and reports. The course will focus on helping participants develop practical skills in database development, data extraction, transformation, visualization as well as reporting. The participants will have an opportunity to utilize popular tools and technologies to transform raw data into actionable business insights.

Course Learning Outcomes

This course has five primary objectives which will be introduced in class lectures and reinforced through hands-on labs, assignments and assigned readings. Through class lectures, assignments, and labs, participants will gain knowledge of business intelligence with database applications and be able to:

- Explain core Business Intelligence (BI) concepts including purpose and benefits of BI, components of a BI system, various types/classifications of BI as well as real world applications of BI
- Understand the respective strengths of and differences between relational and NoSQL databases
- Grasp the basic design principles of relational databases
- Utilize basic Structured Query Language (SQL) commands to query data
- Connect to various data sources, extract-transform-load (ETL) data and build dashboards/reports using popular tools and technologies like PostgreSQL as a relational database, mongoDB as a document store, Apache Nifi for ETL, and Apache Superset for data exploration/visualization.

Getting Help

Email: E-mail the instructor with any queries about the course such as administrative issues, questions regarding the grading of the assignments and projects, or if you have brief questions about the material. ***Please put course number, the section #, your full name and brief heading (i.e., description of what the email is about) as the first part of the subject line in all e-mail correspondence.*** We will try to respond within two business days (48 hours) but if you do not get a response within this time frame, please send another email as we probably did not get the original email. For any other issues, please come speak with the instructor during office hours. Please be professional in all your email correspondence. For more information on how to write an effective and professional email, please see the following link.

Meetings and Office Hours: Please schedule an appointment with the Instructor during office hours. If you cannot attend a scheduled appointment, notify the instructor as soon as possible. If you schedule an appointment and do not show up, this may affect your ability to schedule future appointments.

Course Announcements: All general course emails and announcements from your instructor will be posted and sent in Canvas. This correspondence will be sent to the email account you have specified in your Canvas profile. Note that some section-specific messages may be sent to your email account within the Schulich mail system rather than through Canvas. ***It is your responsibility to ensure that you have access to both sources of information and check each regularly.***

Deliverables at a Glance

Course work includes individual and group assignments/projects as well as participation in class discussions. ***Marks will not be adjusted until all deliverables have been submitted and the final grade has been compiled.*** For each deliverable, the grading will be performed by combining all sections into one and assessing students relative to the entire cohort.

Deliverable	Quantity	% Weight	Total %	Author
Hands-on Lab Assignments	3	15	45	Individual
Project Proposal and Database Design	1	10	10	Groups of 5-7
Final BI Project	1	35	35	
Participation and discussion	1	10	10	Individual
Total			100%	

Course Material

There is no required textbook for this course. The following list includes optional custom books:

Hoffer, J. A., Ramesh, V., and Topi, H. (2019). *Modern database management*. Pearson.

Bradshaw, S., Brazil, E., and Chodorow, K. (2020). *MongoDB: The Definitive Guide: Powerful and Scalable Data Storage.* O'Reilly.

Jones, A. (2024). *Advanced Data Streaming with Apache NiFi: Engineering Real-Time Data Pipelines for Professionals.*

Shekar, S. (2018). *Apache Superset Quick Start Guide.* Packt.

Canvas

Course website: An online learning platform Canvas contains general information for Schulich students and information and materials specific to this course. Check it frequently.

The Canvas contains general information for Schulich students and information and materials specific to this course. Check it frequently.

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

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

Student Preparation for Class and Class Participation: Expectations

Preparation

Lectures will have a significant interactive component. Your attendance is expected. It is recommended that you follow all lectures on your computer and participate in computing exercises (e.g. labs). Students will earn credit for active participation in course activities.

Readings from the text or supplementary materials will be assigned for each of the topics in the course. These are useful for preparation prior to lecture as well as to reinforce class concepts after each session.

Practice problems, where applicable, are selected exercises for you to work on to gain experience in each of the problem solving areas. They will not be graded. Problems and exercises at the end of each chapter in the assigned textbook as well as in-class exercises fall in this group. You may choose to do as many of these problems as you like, and may work on them individually or in groups. In order to maximize your learning, you should attempt the problem individually before working with others. While the suggested problems are a good reflection of the material covered in the course, they are not necessarily comprehensive, and students are encouraged to work on additional problems beyond those suggested.

Hands on computing opportunities that will be provided throughout the course (usually embedded in lectures) will help you put in practice the the theoretical concepts discussed in the lecture portion of our sessions.

Hands-on Lab Assignments will test your learning and help you remember key concepts and issues. These assignments may require students to use specific tools (PostgreSQL, MongoDB, Apache Nifi, Apache Superset) to perform specific tasks, such as:

Weeks 2 & 3 (PostgreSQL and mongoDB): Design and implement database schemas based on provided business scenarios. Write SQL and/or NoSQL queries to extract, filter, and manipulate data.

Week 4 (Apache Nifi): Connecting to various data sources, completing ETL activities provided in the lab.

Weeks 5 & 6 (Apache Superset): Connect Superset to data sources, create basic and advanced visualizations, utilize SQL Lab for complex queries.

Participation

Participating honestly in this academic community ensures that the York University degree that you earn will continue to be valued and respected as a true signifier of your individual work and academic

achievement. All suspected cases of academic dishonesty will be investigated. If you have any questions as to what is and is not permitted, do not hesitate to contact the course instructor or your academic advisors. Potential offences include, but are not limited to:

In papers and assignments:

- Using someone else's ideas or words without appropriate acknowledgement (i.e., citations).
- Submitting your own work in more than one course without the permission of the instructor.
- Making up sources or facts that are false (i.e., the claim is completely unsubstantiated).
- Obtaining or providing unauthorized assistance on any assignment (this includes collaborating with others on assignments that are supposed to be completed individually).

On hands-on lab assignments:

- Using or possessing any unauthorized aids (e.g., large language models, search engines...).
- Copying someone else's answers at any time during the assignment.
- Misrepresenting your identity or having another individual write your assignment.
- Submitting an altered assignment for re-grading.

Misrepresentation:

- Falsifying institutional documents, grades or university documentation (e.g., medical notes).

Late Assignments: Please note that all assignments are due at the date and time specified. The exact date and time will be given in the assignment and on the Canvas. Late work will not be accepted or be severely penalized. Exceptions will only be granted for medical and other serious emergencies. Please make every effort to let your instructor know in advance if your assignment is going to be late – use email. Supporting documentation will be required as per the on missed tests and assignments.

Group Work: Groups of 5-7 students can work on a group assignment. Only one assignment per group should be submitted. Assignments will be submitted online via Canvas Groups can consist of students from other sections of the course (if applicable). However, the assignment must be submitted at the earliest designated due date amongst all group members or else the submission will not be accepted. Learning to work together in teams is an important aspect of your education and preparation for your future careers. That said, project-based teamwork is often new to students and you are therefore reminded of the following expectations with respect to behavior and contributions to your team project.

When working in a team, Schulich students are expected to:

- Treat other members with courtesy and respect and honor the group ground rules.
- Contribute substantially and proportionally to each assignment.
- Ensure enough familiarity with the entire contents of the assignment so as to be able to sign off on it as original work and meet the assignment timeline as established by the team.

Resolving Group Conflicts: Conflicts are part of the team's process of learning how to work together effectively and when handled well, can generate creativity and bring-multiple perspectives to the solution. Student teams are collectively expected to work through their misunderstandings as soon as they arise (and prior to submission of the final project). In cases where teams are unable to arrive at a solution that works for all members, the team must bring this to the attention of the instructor.

Class-by-Class Syllabus

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

Note: If any changes in this schedule become necessary, notifications will be posted on Canvas. When changes need to be announced between classes, an email will be sent to students' email accounts, notifying them of the change. Check your email and the course website regularly. It is your responsibility to ensure that you are up-to-date.

Date (Class)	Topic(s)
(Week 1)	Introduction to Business Intelligence and Databases • Foundations of Business Intelligence ◦ History, purpose, value & benefits, types/classification, components • Foundations of Databases ◦ Concepts, definitions, types/classifications Introduction to the Computing Environment • Hands-on Computing - Prep Session
(Week 2)	Relational Databases and Structured Query Language • Basic Concepts and Definitions ◦ ACID compliance • Conceptual Data Modeling • Introduction to Structured Query Language Reading: Chapter 1, 2, 5 Hoffer et al. (2019) • Hands-on Computing – Session 1 (SQL)
(Week 3)	Big Data and NoSQL Databases • Characteristics of Big Data • NoSQL databases ◦ Types and use cases ◦ CAP Theorem Reading: Chapter 10 Hoffer et al. (2019) • Hands-on Computing – Session 2 (NoSQL)
(Week 4)	BI Tools: ETL Fundamentals and Data Integration with Apache NiFi • Fundamentals of ETL (Extract, Transform, Load) • Data sources (files, databases, APIs...) • Data cleaning • Data transformation • Data Warehousing Basics • ETL Tools • Hands-on Computing – Session 3 (Apache Nifi)

Date (Class)	Topic(s)
(Week 5)	BI Tools: Basic Data Exploration and Visualization with Apache Superset • Connecting to and querying data sources • Creating datasets and building basic charts • Hands-on Computing – Session 4 (Apache Superset)
(Week 6)	BI Tools: Advanced Data Exploration and Visualization with Apache Superset • Advanced customizations and visualizations • Writing advanced queries in Superset SQL Lab • Designing and building dashboards • Hands-on Computing – Session 5 (Apache Superset)

Written Assignments/Projects and Exam[s]: Descriptions

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

Due Date	
TBD.	Hands-on Lab Assignments *Quantity: 3* *Weight: 10%* *Value: 30%*
TBD.	Project Proposal and Database Design *Value: 20%*
TBD.	Final BI Project *Value: 40%*
TBD.	Participation and discussion *Value: 10%*

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

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

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

Letter Grade	Percentage
A+	Above 90.00%
A	85.00%-89.99%
A-	80.00%-84.99%
B+	75.00%-79.99%
B	70.00%-74.99%
B-	65.00%-69.99%
C+	60.00%-64.99%
C	55.00%-59.99%
C-	50.00%-54.99%
F	Up to 49.99%

Note that the grade you earn is determined by your demonstrated performance in the course and not a function of the grade that you need or want.

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

Academic honesty

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

Exams (Absence from)

Students who miss an Exam must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file. Students who miss an Exam due to illness must have their doctor complete an "Attending Physician's Statement." For more details, see the following link.

Accommodations

For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services. Students are advised to make the instructor aware of any accommodations required, so the instructor can provide those accommodations on a timely basis. For counseling and disability services, contact Student Services or see the following link.

MEMORANDUM

York University Libraries

To: Dr. Altay Aksulu, OMIS Area, Schulich School of Business

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

Date: March 17, 2025

Subject: Library Statement – OMIS 5400 1.5 Business Intelligence with Database Applications

Summary

York University Libraries (YUL) is well positioned to support this proposed course which covers the fundamentals of business intelligence (BI) using databases. This intensive 6-week course will help unlock the power of data-driven decision making for students. They will gain hands-on experience in building complete BI solutions, from database design (relational and NoSQL) to creating interactive dashboards and reports. The course will focus on helping students develop practical skills in database development, data extraction, transformation, visualization as well as reporting. They will have an opportunity to utilize popular tools and technologies to transform raw data into actionable business insights. 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. It also brings attention to collections of interest from connected fields such as computer science and information technology.

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:

- Business intelligence, Data processing, Database design, Database management, Information storage and retrieval systems, Data warehousing, Big data, Data analytics, and Data visualization 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 class themes and weekly topics, a tailored selection of electronic databases of interest for this course are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings.

Business & Technology Databases:

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

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:

- Omni Search Guide
- Business Articles Research Guide
- Step-by-Step Business Database Tutorials
- Information Technology Guide
- Computer Science Research Guide
- Data Visualization 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 and at the Steacie Science & Engineering Library Monday to Friday. In addition, students and faculty can book one-hour research consultations with a specialist librarian.

Accessibility Services

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

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:
Tech MBA

2. Responsible Unit:
OMIS

3. Subject Code (Rubric) and Course Number:
OMIS 5401

4. Credit Value:
1.50

5. Long Course Title:
Technology-Enabled Operations Management

6. Short Course Title:
Tech-Enabled Operations Management

7. Effective Term/Calendar Year:
Fall 2026

8. Language of Instruction: English

9. Calendar (Short) Course Description:

This course explores how digital and physical technologies enhance efficiency, effectiveness, and integration in operations and supply chains. Covering process analysis and management, Lean Six Sigma, TQM and the use of new technologies (e.g., IoT, machine learning, AI) in enterprise-level information systems, this course aims to develop a fundamental understanding of choices made by operations and supply chain managers. Only available to Tech MBA students.

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York University

10. Expanded Course Description:

This course explores how digital and physical technologies enhance efficiency, effectiveness, and integration in operations and supply chains. Covering process analysis and management, Lean Six Sigma, TQM and the use of new technologies (e.g., IoT, machine learning, AI) in enterprise-level information systems, this course aims to develop a fundamental understanding of choices made by operations and supply chain managers. The course uses a combination of readings, exercises, cases and projects to relay, experience and support the discussion of the topics.

Only available to Tech MBA students.

11. Course Learning Outcomes:

- Core OM principles: process types & process analysis; effectiveness & efficiency
- Know the major quality management frameworks (TQM, Six Sigma) and flow process choices (JIT, lean); value stream mapping
- Understand how these concepts relate to supply chain integration and data sharing across organizations
- Understand the technologies used in manufacturing and supply chains that collect data, produce or move things or control the movement and behaviour of such technologies
- Impact of such technologies on effectiveness, efficiency and customer service
- Understand how Materials Resource Planning (MRP II – dependent demand planning) works and how it functions as the basis of the value chain for products and services
- Understand warehouse management
- Know about ERP systems and their role in integrating business operations across supply chains
- Understand how supply chain information systems are impacted by emerging technologies
- Understand what the impact of these new technologies is on supply chain performance.

12. Rationale:

This is a required course in the revised Tech MBA.

13. Evaluation:

Assignment/Task	Quantity	% Weight	Total %	Author
Quiz (lecture 4)	1	20	20	individual
Project Proposal (lecture 3)	1	0	0	group
Project presentation (lecture 6)	1	30	30	group
Final Exam	1	50	50	Individual
			100%	

14. Integrated Courses:
N/A

15. Cross-listed Courses:
N/A

16. Enrolment Notes:
Tech MBA Students only.

17. Faculty Resources:

Isik Bicer, Markus Biehl, Vibhuti Dhinga, Adam Diamant, Raha Imanirad
David Johnston, Murat Kristal and others

18. Physical Resources:
none

19. Bibliography and Library Statement:

Required reading for this course includes the following materials. Except for the case study, all are available through the online library.

1. Main book:
   Paksoy, T. & Deveci, M. (2021), *Smart and Sustainable Operations and Supply Chain Management in Industry 4.0*. United Kingdom: CRC Press. https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036909826405164
2. Tarantino, A. (2022) *Smart Manufacturing: The Lean Six Sigma Way*. [Online]. Hoboken, New Jersey: Wiley. Chapter 3 https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036891205105164
3. Tarantino, A. (2022) *Smart Manufacturing: The Lean Six Sigma Way*. [Online]. Hoboken, New Jersey: Wiley. Chapter 2. https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036891205105164

4. Case: Sasser, W. Earl. "Benihana of Tokyo." Harvard Business School Case 673-057, November 1972. (Revised July 2023.) MUST BE PURCHASED.
5. Muzaffer Alım & Saadettin Erhan Kesen (2021), 'Smart Warehouses in Logistics 4.0', in Turan Paksoy, Cigdem Gonul Kochan, Sadia Samar Ali (Eds.), *Logistics 4.0*. 1st edition. CRC Press. pp. 186–201. https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/j50f41/cdi_informaworld_taylorfrancisbooks_10_1201_9780429327636_22_version2

Optional materials listed in the week-by-week overview.

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

20. Instructors and Faculty Coordinator

Initial instructor:
Markus Biehl

Alternative instructors:
See #17

Course coordinator:
Murat Kristal (Program Director)

21. Specializations

Primary area or specialization:
N/A

Secondary areas or specializations:
N/A

22. Student Contact and Enrolment

Contact hours:
16

Maximum enrolment:
55

Expected enrolment:
Whatever the admissions level is to the program (max 55)

Evidence for enrolment expectations:
The program is underway and has good enrolment.

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

a. *Describe how equity, diversity, and inclusion including decolonization and Indigenization perspectives are reflected in (1) content (e.g., assigned readings,*

materials, case studies, etc.) and (2) delivery (e.g., ensuring that everyone is included and that diverse perspectives are valued and respected) of the proposed course.

This course addresses how various choices and technologies impact social performance, including disadvantaged groups. As this is a highly technical course, most of these aspects will be addressed during class discussions; students may also address them as part of their course projects.

b. *Describe how this course contributes to students' learning about equity, diversity, inclusion, and decolonization with respect to the context of this course.*

The use of machine learning and artificial intelligence comes with inherent biases. These biases will be discussed in class.

24. Human Participants Research

N/A

25. Conditions for Approval

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

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

b)

Part of a curriculum revamp. No net new credits.

c) Provide a convincing case for the proposed course.

State the reason the program needs this new course and provide evidence that the Area has no elective with student enrolments low enough to warrant deletion. Approval from the ADA will be required.

Originator:

Markus Biehl	Feb 26, 2025
Signature	Date
Markus Biehl	OMIS
Name	Area or Specialization

Schulich
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York University

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.

Isik Bicer	OMIS
Vibhuti Dhingra	OMIS
Adam Diamant	OMIS
Eileen Fischer	MKTG
Ashwin Joshi	MKTG
Henry Kim	OMIS

Approvals

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

Henry Kim March 8, 2025
Signature Date

Name of Coordinator or Director Area or Specialization

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

Murat Kristal Feb 27, 2025
Signature Date

Murat Kristal Tech MBA
Name of Program Director Program

Schulich
School of Business
York University

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

Kevin Tasa
Signature

November 20, 2025
Date

Kevin Tasa
Name of Committee Chair

Master Programs Committee
Committee

OMIS 5401 1.5: Technology-Enabled Operations Management

Course Outline
Fall 2026

<Class day[s]>, <Time>, beginning on <month/day>
<Class location>
<Lab day>, <Time> (if applicable)
<Lab location> (if applicable)

Instructor
<Salutation> <Name>
<Office location (e.g., N100, Seymour Schulich Building)>
<Phone (use Area or support staff number)>
<E-mail>
Office hours: <Day[s], Time[s]>, <whether an appointment is required>

Assistant
<Name>
<Office>
<Phone>
<E-mail>

<Brief bio/interests of instructor (max 3 lines suggested)>

Brief Description

This course explores how digital and physical technologies enhance efficiency, effectiveness, and integration in operations and supply chains. Covering process analysis and management, Lean Six Sigma, TQM and the use of new technologies (e.g., IoT, machine learning, AI) in enterprise-level information systems, this course aims to develop a fundamental understanding of choices made by operations and supply chain managers. Only available to Tech MBA students.

Prerequisites/Corequisites/Course Exclusions: <none>

Contents

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Student Preparation for Class and Class Participation: Expectations 3
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Evaluation of Written Assignments/Projects and Exams 7
Calculation of Course Grade 7
General Academic Policies: Grading, Academic Honesty, Accommodations and Exams 7

Course Learning Outcomes

- Core OM principles: process types & process analysis; effectiveness & efficiency
- Know the major quality management frameworks (TQM, Six Sigma) and flow process choices (JIT, lean); value stream mapping
- Understand how these concepts relate to supply chain integration and data sharing across organizations
- Understand the technologies used in manufacturing and supply chains that collect data, produce or move things or control the movement and behaviour of such technologies
- Impact of such technologies on effectiveness, efficiency and customer service
- Understand how Materials Resource Planning (MRP II – dependent demand planning) works and how it functions as the basis of the value chain for products and services
- Understand warehouse management
- Know about ERP systems and their role in integrating business operations across supply chains
- Understand how supply chain information systems are impacted by emerging technologies
- Understand what the impact of these new technologies is on supply chain, environmental and social performance.

Deliverables at a Glance

Assignment/Task	Quantity	% Weight	Total %	Author
Quiz (lecture 4)	1	20	20	individual
Project Proposal (lecture 3)	1	0	0	group
Project presentation (lecture 6)	1	30	30	group
Final Exam	1	50	50	Individual
			100%	

For details, see “Written Assignments/Projects and Exam[s]: Descriptions” (p. <XX>) and “Evaluation …” (p. <XX>).

Course Material

Required reading for this course includes the following materials. Except for the case study, all are available through the online library.

1. Main book:
   Paksoy, T. & Deveci, M. (2021), *Smart and Sustainable Operations and Supply Chain Management in Industry 4.0*. United Kingdom: CRC Press. https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036909826405164
2. Tarantino, A. (2022) *Smart Manufacturing: The Lean Six Sigma Way*. [Online]. Hoboken, New Jersey: Wiley. Chapter 3

https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036891205105164

3. Tarantino, A. (2022) *Smart Manufacturing: The Lean Six Sigma Way*. [Online]. Hoboken, New Jersey: Wiley. Chapter 2. https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036891205105164
4. Case: Sasser, W. Earl. "Benihana of Tokyo." Harvard Business School Case 673-057, November 1972. (Revised July 2023.) MUST BE PURCHASED.
5. Muzaffer Alım & Saadettin Erhan Kesen (2021), 'Smart Warehouses in Logistics 4.0', in Turan Paksoy, Cigdem Gonul Kochan, Sadia Samar Ali (Eds.), *Logistics 4.0*. 1st edition. CRC Press. pp. 186–201. https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/j50f41/cdi_informaworld_taylorfrancisbooks_10_1201_9780429327636_22_version2

Optional materials listed in the week-by-week overview.

Student Preparation for Class and Class Participation: Expectations

<Include details as appropriate. N.B.: Students appreciate explicit guidance on the amount and type of pre-class preparation expected by an instructor.>

Preparation. You are expected to do the readings and come prepared for class, so you can meaningfully contribute to the discussion.

Class Participation (contribution). This is a course in which participation is important, with the instructor facilitating learning through analyses and discussions. Quality contributions to discussions are welcome, in the form of either substantive or process contributions. The latter help move the discussion along without in itself making a substantive contribution.

Class-by-Class Syllabus

<Provide a general orientation as appropriate. For example, if the course is organized into modules, identify the modules. If each class follows a standard format—or not—note that here. >

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

Note: If any changes in this schedule become necessary, notifications will be posted on the course CMD, and when changes need to be announced between classes, an email will be sent to students' Lotus Notes email accounts, notifying them of the change.

Sessi on 1 Fundamentals of Operations Management I – Processes Analysis

Read:

- Paksoy, T. & Deveci, M. (2021), *Smart and Sustainable Operations and Supply Chain Management in Industry 4.0*. United Kingdom: CRC Press.
  CHAPTER 1: Fundamental Concepts of Smart and Sustainable Operations and Supply Chain Management, pp. 1-26
  https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036909826405164
- Tarantino, A. (2022) *Smart Manufacturing: The Lean Six Sigma Way*. [Online]. Hoboken, New Jersey: Wiley.
  CHAPTER 3: Continuous Improvement Tools for Smart Manufacturing (pp. 43-108)
  https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036891205105164

Optional:

- Operations Management Reading: Managing Quality with Process Control, HBS 8020-PDF-ENG, Sep 2013 (Revised Jun 2024)

Session 2 Fundamentals of Operations Management II – Process Management & Quality

Read:

- Tarantino, A. (2022) *Smart Manufacturing: The Lean Six Sigma Way*. [Online]. Hoboken, New Jersey: Wiley.
  CHAPTER 2: Lean Six Sigma in the Age of Smart Manufacturing (pp. 21-42)
  https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036891205105164
- Simulation Materials for Paper Airplane Exercise (project vs batch vs flow, with implications for efficiency and quality): https://opexlearning.com/resources/paper-airplane-game-pull-systems-push-systems/8280/;
  alternatively: Case: Lean Implementation at Siemens' Kalwa Plant (2012); Ivey 9B12M026

Optional:

- Naslund, D. (2008). Lean, six sigma and lean sigma: fads or real process improvement methods? *Business Process Management Journal*, *14*(3), 269–287;
  https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/j50f41/cdi_emerald_primary_10_1108_14637150810876634
- Paksoy, T. & Deveci, M. (2023.), *Smart and Sustainable Operations and Supply Chain Management in Industry 4. 0*. 1st edition [Online]. United Kingdom: CRC Press.
  CHAPTER 11: Just-in-Time and Lean Management, pp. 223–236 a
  CHAPTER 6: Statistical Process Control (SPC) and Quality Management, pp. 117-136.
  https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036909826405164

Session 3 Hardware Technologies in Supply Chain Operations

Prep:

- Case: Sasser, W. Earl. "Benihana of Tokyo." Harvard Business School Case 673-057, November 1972. (Revised July 2023.) – Purchase from Ivey or HBS
- 1-page proposal for class project

Read:

- Akandere, G. et al. (2023) 'The Internet of Things and Cyber-Physical Systems', in Paksoy, T. & Deveci, M. (eds.), *Smart and Sustainable Operations and Supply Chain Management in Industry 4. 0*. 1st edition [Online]. United Kingdom: CRC Press. pp. 277–305. (CHAPTER 14)
  https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/1jocqcq/alma991036909826405164
- Kuvvetli, Y. et al. (2023) 'AI, Robotics, and Autonomous Systems', in Paksoy, T. & Deveci, M. (eds.), *Smart and Sustainable Operations and Supply Chain Management in Industry 4. 0*. 1st edition [Online]. United Kingdom: CRC Press. pp. 385–400. (CHAPTER 19)

Optional:

- Biehl, Markus (2025): On Industry 4.0 Technologies in Transportation, Working Paper, York University, 37 pp.
- Videos on technologies (to be posted in Canvas)

Session 4 Software-Driven Operations I – MRP, WMS, ERP

Prep:

- This class starts off with a quiz that comprises the learnings from weeks 1-3.

Read:

- Birsen İrem Selamoğlu (2023), 'MRP and ERP', in Paksoy, T. & Deveci, M. (eds.), *Smart and Sustainable Operations and Supply Chain Management in Industry 4. 0*. 1st edition [Online]. United Kingdom: CRC Press. pp. 203–221.
  https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/j50f41/cdi_proquest_ebookcentralchapters_7169149_18_214
- Muzaffer Alım & Saadettin Erhan Kesen (2021), 'Smart Warehouses in Logistics 4.0', in Turan Paksoy, Cigdem Gonul Kochan, Sadia Samar Ali (Eds.), *Logistics 4.0*. 1st edition. CRC Press. pp. 186–201.
  https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/j50f41/cdi_informaworld_taylorfrancisbooks_10_1201_9780429327636_22_version2

Session 5 Software-Driven Operations II – Emerging Technologies & the Future of ERP & WMS

Read:

- Sahin, M. et al. (2023) 'Machine Learning and Data Analytics', in Paksoy, T. & Deveci, M. (eds.), *Smart and Sustainable Operations and Supply Chain Management in Industry 4. 0*. 1st edition [Online]. United Kingdom: CRC Press. pp. 307–321. (CHAPTER 15)
- Demir, S. et al. (2023) 'Blockchain Technology', in Paksoy, T. & Deveci, M. (eds.), *Smart and Sustainable Operations and Supply Chain Management in Industry 4. 0*. 1st edition [Online]. United Kingdom: CRC Press. pp. 367–384. (CHAPTER 18)

Session 6 AI in ERP & WMS – Future applications & Issues

Prep:

- Project Presentation

Optional:

- Jiang, F. et al. (2023) How blockchain technology hyperautomatically affects corporate performance by green supply chain? *Enterprise information systems*. [Online] 17 (10), 1408–1432. https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/j50f41/cdi_crossref_primary_10_1080_17517575_2023_2204305
- Agrawal, N. et al. (March/April 2024) *How Machine Learning Will Transform Supply Chain Management*. Boston: Harvard Business Review. https://ocul-yor.primo.exlibrisgroup.com/permalink/01OCUL_YOR/j50f41/cdi_proquest_miscellaneous_2986181659
- Also check out articles in Harvard Business Review, which I am not allowed to link here.

Written Assignments/Projects and Exam[s]: Descriptions

<Submission instructions, e.g., Please complete all papers below in 12-point font, single-spaced, and adhere strictly to page maxima.>

Due Date

Session 3 Course Project – Proposal

Your group will turn in a 1-page proposal of what you intend to do your presentation on. Please include the following elements: brief intro; your research question and why it's important; what you expect to find; a sample of sources you have consulted; steps you will take to complete the project.

Due Date

Value: Not graded – for feedback only.

Session 3 Case Study

This case study deals with process analysis, layout choices and performance measurement. Nothing to turn in, just be prepared for the discussion by evaluating the quantitative and qualitative information given using a root cause analysis and applying concepts taught in the course.

Value: Highly valuable, but not graded.

Session 4 Quiz

A ½-hour quiz that covers the materials covered in weeks 1-3.

Value: 20%

Evaluation of Written Assignments/Projects and Exams

The presentation will be evaluated based on the quality of the slides, the substance and conclusiveness of your research and message and your presentation skills.

Calculation of Course Grade

This course uses the standard graduate grading scale.

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

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

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

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

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

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

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

Exams (Absence from)
Quiz. Students who miss a quiz must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file.
Final. Within 24 hours of missing a final examination, students must contact the Director of Student Services at (416) 736-5060 and must also contact their course instructor. Formal, original documentation regarding the reason for missing the exam must be submitted to the Director of Student Services, Associate Director, Undergraduate Programs Unit (SSB Room W262) within 48 hours of missing the final exam. Students who miss a final exam due to illness must have their doctor complete an "Attending Physician's Statement." For a copy of this document, visit:
http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf

SUBJECT: Library Statement for OMIS 5401: Technology-Enabled Operations Management
FROM: Angie Liann, Teaching & Learning Librarian / Business Liaison Librarian
DATE: June 16, 2025

OMIS 5401: Technology-Enabled Operations Management

York University Libraries (YUL) will be able to support the proposed course, OMIS 5401: Technology-Enabled Operations Management. This course explores how digital and physical technologies enhance efficiency, effectiveness, and integration in operations and supply chains. YUL has a strong collection of electronic and print periodicals, books, and databases that will help students conduct secondary research for this course.

All the course materials can be accessed through the YUL's Omni search interface. It is recommended to place the textbooks and readings on reserve via the online reserves request form. YUL has an extensive collection of print and eBooks on the course topics.

YUL's Omni search interface can be used to locate scholarly, trade, and newspaper articles. Students may consult the Omni search guide for tips on using this discovery layer to find relevant articles. *Proquest Business* and *Business Source Complete (BSC)* are two core databases that provide subject-specific scholarly and trade business article publications. *Factiva* and *Nexis Uni* are two excellent databases that provide access to thousands of business news publications.

Students will have access to key business databases such a*s Capital IQ; Passport; Statista; IBISworld;* and *Marketline Advantage.* A complete list of YUL's business databases can be viewed at Business Resources A-Z. Additional information on relevant article databases can be located on YUL's Business Articles guide,

Students are encouraged to learn more about various databases the library subscribes to by consulting YUL's well-developed and curated research guides and Step-by-Step Business Research Tutorials. These guides and tutorials list librarians' recommended resources for most asked research tasks.

Students will have access to research help and consultation services both in-person and online. Students have the options to visit the reference desk at Peter F. Bronfman Business library, send an email to bronfref@yorku.ca, use the online chat service, or book a Zoom consultation with a business librarian.

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:
Technology MBA
This course is designed primarily for MBA students (especially those focusing on strategy/consulting), but can be accessible to other masters-level business programs.

2. Responsible Unit:
OMIS

3. Subject Code (Rubric) and Course Number:
OMIS 6015

4. Credit Value:
1.50

5. Long Course Title:
Strategic Consulting in Technology Contexts: Lifecycle, Analysis, and Communication

6. Short Course Title:
Strategic Consulting for Tech

7. Effective Term/Calendar Year:
Summer 2027

8. Language of Instruction:
English

9. Calendar (Short) Course Description:
Introduces strategic consulting skills for technology-driven business environments. Students learn to contract with clients, gather data, apply qualitative and quantitative analysis, and deliver recommendations using structured communication frameworks. No prior consulting or technology experience is required, but an undergraduate business background is expected. Teams develop a consulting proposal and presentation,

culminating in an individual final report.

10. Expanded Course Description:
This course offers a hands-on introduction to strategic management consulting specifically tailored for technology-driven business environments. Over six weeks, students learn and apply the full consulting lifecycle—from initial client engagement and scoping through data collection, analysis, and the communication of strategic recommendations—within the context of technology-focused organizations and digital transformation initiatives.
The course emphasizes practical consulting frameworks such as contracting, hypothesis-driven analysis, issue trees, and the Pyramid Principle, while foregrounding the real-world complexities of consulting on technology projects, including systems constraints, data challenges, platform integration, user adoption considerations, and the pace of emerging technologies such as AI, automation, and cloud computing.
Through team-based consulting proposals and presentations, supported by an individual final report that deepens and extends their analysis, students gain experience diagnosing technology-related business problems, synthesizing technical and business insights, and crafting actionable recommendations for organizations navigating technological disruption.

11. Course Learning Outcomes:
By the end of this course, students will be able to:

- Explain and apply the end-to-end consulting process—contracting, discovery, analysis, and recommendation—in the context of technology-driven organizations and technology-related business challenges.
- Employ structured problem-solving tools (e.g., issue trees, MECE principle) to break down complex problems associated with technology strategy, digital transformation initiatives, or technology-enabled business models.
- Collect and analyze quantitative and qualitative data relevant to technology consulting projects, including financial assessment of tech initiatives, stakeholder interviews in IT/technical environments, and market/competitive analysis of emerging technologies.
- Manage client relationships effectively in technology contexts, demonstrating collaborative consulting skills such as trust-building with technical and non-technical stakeholders, and navigating objections related to digital, data, or system-level decisions.
- Develop and evaluate strategic recommendations that are actionable, feasible, and grounded in the specific realities of technology-focused environments (e.g., implementation complexity, technology adoption barriers, architecture and data constraints).
- Communicate technology-related recommendations clearly and persuasively using structured communication frameworks such as the Pyramid Principle in both written reports and oral presentations.

- Work effectively in teams to scope and execute technology consulting projects, integrate cross-functional analyses (technical, financial, market), and deliver cohesive client-ready outputs.
- Demonstrate adaptive and forward-looking thinking regarding technological disruption, digital transformation, emerging technologies (e.g., AI, cloud, automation), and their implications for strategic decision-making.

12. Rationale:
This course equips graduate business students with practical consulting skills that are highly relevant to multiple career paths, particularly in strategy consulting and technology management. It reinforces hands-on learning by pairing group collaboration with an individual final report, ensuring personal accountability and deeper research/analysis. The course addresses a growing market demand for consultants conversant in emerging technologies and digital transformation, particularly with the rise of Artificial Intelligence.

While there may be other strategy or consulting electives, this course's explicit focus on technology contexts sets it apart. Students learn universal consulting principles but consistently apply them specifically to technology-based challenges (e.g., digital transformation, software product strategy).

13. Evaluation:
Individual Engagement – 20%

Evaluated through active in-class participation, constructive discussion, and optional short reflection (up to 500 words).

Project Proposal (Group) – 10%

2–3 pages, outlines the consulting engagement scope, approach, and feasibility.

Interim Progress Update (Group) – 10%

5-minute in-class team presentation highlighting data collection and early findings.

Final Presentation (Group) – 20%

15-minute presentation to the "client" (instructor/class), focusing on top recommendations and analysis.

Final Report (Individual) – 40%

~3,000-word written report due 3 weeks after the last class. Expands on the group's findings with deeper, independent analysis and personal insights.

14. Integrated Courses:

n/a

15. Cross-listed Courses:

n/a

16. Enrolment Notes:

Recommended for MBA students (elective).

Open to other Masters students with a foundational business background.

No formal caps beyond typical elective class sizes (target: ~30 students).

No special equipment beyond standard classroom projection.

17. Faculty Resources:

Tarun Rihal, Murat Kristal, Adam Diamant

18. Physical Resources:

Standard classroom with presentation capabilities (projector, whiteboard) will suffice. No additional lab or specialized facilities needed.

19. Bibliography and Library Statement:

Louise Wickham & Jeremy Wilcock. Management Consulting: Delivering an Effective Project (Pearson, 6th ed., 2020).

Barbara Minto. The Pyramid Principle: Logic in Writing and Thinking (FT Press, 2010).

Peter Block. Flawless Consulting: A Guide to Getting Your Expertise Used (Wiley, 3rd ed., 2011).

Ethan M. Rasiel. The McKinsey Way (McGraw-Hill, 1999).

Optional articles and industry reports on technology consulting contexts (e.g., *McKinsey Quarterly*, *MIT Tech Review*) will be provided digitally.

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

20. Instructors and Faculty Coordinator

Initial instructor:
Tarun Rihal

Alternative instructors:
Murat Kristal

Course coordinator
Adam Diamant

21. Specializations

Primary area or specialization:
OMIS

Secondary areas or specializations:

22. Student Contact and Enrolment

Contact hours:
Approximately 16.5 hours total in-class

Maximum enrolment:
45

Expected enrolment:
25

Evidence for enrolment expectations:
Technology strategy and consulting electives historically fill quickly, with strong demand from MBA students aiming for consulting or tech-related roles, particularly due to the importance of emerging technologies (e.g. Artificial Intelligence, Quantum Computing).

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York University

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

Case studies and examples will include diverse industries, markets, and technology contexts. Class discussions encourage diverse viewpoints, ensuring no single perspective dominates. Students practice inclusive teamwork principles, reflecting on how technology decisions affect various communities. By examining real-world scenarios (including potential ethical or social implications of tech-based strategies), students consider the broader impact of consulting recommendations on stakeholders from different backgrounds.

24. Human Participants Research

N/A

25. Conditions for Approval

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

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

N/A

b) Provide a convincing case for the proposed course.

This course addresses a recognized need for advanced consulting and strategic thinking in technology-driven environments, aligning with the program's objectives to prepare students for evolving business challenges.

Originator:

Signature	Date
Name	Area or Specialization

Supporting Faculty Members

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

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

Divinus Oppong-Tawiah	OMIS
Adam Diamant	OMIS
David Johnston	OMIS
Julian Yeomans	OMIS
Isik Bicer	OMIS
Murat Kristal	OMIS

Approvals

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

_____ _____
Signature Date

_____ _____
Name of Coordinator or Director Area or Specialization

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

_____
Signature Date

_____
Name of Program Director Program

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

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Kevin Tasa	November 20, 2025
Signature	Date
Kevin Tasa	Master Programs Committee
Name of Committee Chair	Committee

OMIS 6015 1.5: Strategic Consulting for Tech

Full course title: Strategic Consulting in Technology Contexts: Lifecycle, Analysis, and Communication

Course Outline
<Term (Fall/Winter/Summer)> <Year>

<Class day[s]>, <Time>, beginning on <month/day>
<Class location>
<Lab day>, <Time> (if applicable)
<Lab location> (if applicable)

Instructor
<Salutation> <Name>
<Office location (e.g., N100, Seymour Schulich Building)>
<Phone (use Area or support staff number)>
<E-mail>
Office hours: <Day[s], Time[s]>, <whether an appointment is required>

<Brief bio/interests of instructor (max 3 lines suggested)>

Assistant
<Name>
<Office>
<Phone>
<E-mail>

Brief Description
This course introduces students to the practice of strategic management consulting, with an emphasis on technology-driven business contexts. Students will learn the consulting project lifecycle – from initial client engagement and problem definition through data collection, analysis, and the communication of strategic recommendations – in a hands-on, applied manner. The focus is on developing practical consulting skills (client management, qualitative and quantitative analysis, structured problem-solving, and executive communication) through interactive class activities and a term-long group project. By the end of the module, students will have experience scoping a consulting project, conducting analysis, and delivering a strategic recommendation for a real or simulated technology-related business scenario. Although the course is primarily intended for those pursuing careers in consulting/strategic consulting disciplines, it is also structured to introduce skills that can benefit students engaged in any structured business decision-making setting. (No prior consulting or technology industry experience is assumed.)

Prerequisites/Corequisites/Course Exclusions: Open to MBA and Masters students. Undergraduate degree in business (BBA/BCom) or equivalent foundational business courses is expected. *No prior consulting or technology strategy coursework is required.*

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Course Learning Outcomes

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

- Explain and apply the consulting process – from contracting with a client through discovery, analysis, and recommendation – in a structured way, including key phases such as problem definition, hypothesis-driven analysis, and solution development.
- Employ structured problem-solving tools (such as issue trees and the MECE principle) to break down complex business problems and identify root causes and opportunities
- Collect and analyze data strategically, utilizing both qualitative methods (e.g. interviews, workshops) and quantitative techniques (e.g. financial analysis, market research) to inform evidence-based recommendations.
- Manage client relationships effectively, demonstrating collaborative skills in contracting, handling client communications, and building trust, in line with best practices (e.g. establishing a collaborative relationship and addressing both technical and interpersonal aspects.
- Develop and evaluate strategic recommendations for technology-driven business challenges, considering the client's capabilities, the competitive/technological environment, and implementation feasibility.
- Communicate recommendations with clarity and impact, using the Pyramid Principle to structure arguments and "start with the answer" in both written reports and oral presentations.
- Work effectively in teams on consulting projects, including scoping a project, dividing tasks, integrating diverse analyses, and producing a cohesive final deliverable.
- Demonstrate adaptive thinking in technology contexts, recognizing how rapid technological change and digital disruption influence strategic decisions. (Throughout the course, students will apply decision-making to a technology-focused project of their choice, gaining insight into consulting for tech industries.)

Deliverables at a Glance

The table below summarizes the course deliverables and assessments. Unless noted otherwise, all work is to be completed in teams formed in Week 1 (3-5 students per team). The final course grade is determined by the weight of each component in the "% Weight" column. Individual grades on group work may be adjusted based on peer evaluation and contribution.

Assignment/Task	Quantity	% Weight	Total %	Author
Individual Engagement*	6 sessions		20%	Individual

Assignment/Task	Quantity	% Weight	Total %	Author
Project Proposal (Client Brief)	1		10%	Group
Interim Progress Update	1		10%	Group
Final Presentation (Consulting Pitch)	1		20%	Group
Final Report (Strategic Recommendations)	1		40%	Individual
			100%	

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

*Individual Engagement – please see "Student Preparation for Class/Class Participation" section for details.

Course Material

The following books are required reading for this course (available at the campus bookstore and library reserves). Weekly readings will be drawn from these texts (see Session-by-Session Syllabus) and will not exceed approximately 80-100 pages per week. Students are expected to complete readings before each class to enable informed participation. They are available for purchase from the York University Bookstore (http://bookstore.blog.yorku.ca):

1. **Louise Wickham & Jeremy Wilcock – Management Consulting: Delivering an Effective Project (Pearson, 6th ed., 2020)**. A comprehensive textbook on managing consulting projects from start to finish. It guides students through the consulting process and includes tools, case studies, and tips for each stage of a project.
2. **Barbara Minto – The Pyramid Principle: Logic in Writing and Thinking (FT Press, 2010)**. A renowned guide to structured communication. Minto's Pyramid Principle advocates that ideas should be organized into a pyramid hierarchy under a single overarching idea. This book will help you craft clear, logical recommendations and reports – an essential skill for the final project.
3. **Peter Block – Flawless Consulting: A Guide to Getting Your Expertise Used (Wiley, 3rd ed., 2011)**. A classic "consultant's bible" focusing on the consulting relationship and process. Block emphasizes building trust, effective contracting with clients, managing resistance, and ensuring your expertise is utilized. This book offers deep insight into client engagement and interpersonal dynamics in consulting.
4. **Ethan M. Rasiel – The McKinsey Way (McGraw-Hill, 1999)**. A former McKinsey consultant offers insights into the techniques of top strategic consultants. This easy-to-read book provides practical lessons on problem-solving, fact-based analysis, and how consulting teams operate, covering topics from the 80/20 rule to team brainstorming.

Additional Readings: Occasional case studies, articles, or handouts focusing on technology industry contexts or consulting tools may be provided via the Course Materials site or class handouts. These will be listed as "Optional" in the syllabus and are not required but will enrich class discussion (e.g. short industry articles, sample consulting deliverables, etc.). There is no course kit required. Students are encouraged to follow current events in technology and consulting (e.g. via Consulting.ca, McKinsey Quarterly, MIT Tech Review) to bring real-world insights to class.

Student Preparation for Class and Class Participation: Expectations

<Include details as appropriate. N.B.: Students appreciate explicit guidance on the amount and type of pre-class preparation expected by an instructor.>

Preparation: Students are expected to come to each class having completed the required readings and any assigned preparation work. Preparation may include analyzing a short case or scenario provided in advance, gathering information on your team's chosen project topic, or preparing brief answers to discussion questions. As a guideline, anticipate 3 to 4 hours of preparation per week, which includes reading (~60-80 pages on average) and teamwork on the project. In a compressed six-week schedule, it is crucial to stay on top of readings from the start. Each week builds on prior material and contributes to your project – for example, you will apply the frameworks from the reading in class activities and in your group project work.

Class Participation (contribution): This course heavily emphasizes in-class interaction, discussion, and applied exercises. Students are expected to actively contribute by:

- asking and answering questions;
- sharing insights from readings or personal experience;
- engaging in group discussions and workshops;
- constructively critiquing peer presentations.

Quality of contribution is valued over quantity – insightful analysis, good questions, and respectful dialogue will count positively.

Ground rules: Please arrive on time, attend all sessions (or inform the instructor of absences in advance), and refrain from multitasking or using devices for non-class activities. Because much of the learning happens through practice and discussion, missing classes or not participating will impact your grade and, more importantly, your skill development. We will foster an inclusive environment where all students feel comfortable sharing ideas; listening and responding to your peers is as important as voicing your own thoughts.

In group exercises and project work, each student should take an active role. You will be peer-evaluated on your contributions to team deliverables. Being a good "consulting team member" – showing up prepared, completing agreed tasks, and helping your team solve problems – is part of your participation expectation.

Preparation for group work: Outside of class, expect to meet with your team regularly to work on the project (at least 1-2 hours per week). Come to class ready to report progress or ask questions about any roadblocks your team is facing. The instructor will be available to provide guidance during and outside class as needed.

Individual Engagement: **20% of the course grade is based on your participation and engagement throughout.** While the instructor will make best efforts to ensure that all students have the ability to engage in group and class discussions, this may not always be possible. Therefore, students will have the <u>option</u> of submitting a reflection statement to support this grade.

If they choose to do so, they may address prompts such as: What do you consider your key takeaways about the consulting process or working in technology contexts? How did your perception of consulting change from Week 1 to Week 6? What challenges did you face on the project and how did you address them? What would you do differently in a future consulting project? They can also choose to reflect on

their team dynamics and what they learned about effective teamwork/communication. They might also connect to course concepts (e.g., "Initially I underestimated the importance of contracting, but during our project I saw why setting scope early was critical, aligning with Block's emphasis on a 'flawless' contract.").

In order to be considered, this reflection must be no more than 500 words in length and must be submitted prior to the due date for the final assignment. Multiple submissions will not be accepted. It will not be graded directly, but will be considered when calculating the individual engagement grade. It is not about repeating course content but rather demonstrating personal and professional growth. Quality reflections draw concrete examples from the project or class activities and illustrate how the experience will inform your future work or studies.

Class-by-Class Syllabus

Below is the week-by-week syllabus of topics, activities, readings, and deliverables. Each 3-hour session will typically be structured as ~50% interactive lecture/discussion and ~50% hands-on activity (case exercise, breakout group work, or presentations).

> Note: If any changes in this schedule become necessary, notifications will be posted on the course CMD, and when changes need to be announced between classes, an email will be sent to students' Lotus Notes email accounts, notifying them of the change.

<session date> <(class session)>

<u>Session 1: Introduction to Consulting & Project Kickoff</u>

Course introduction; the nature of management consulting; overview of the consulting lifecycle (from client entry to recommendation); consulting in technology industries – opportunities and challenges. Team formation and project topic selection.

In-class activities:

- We will outline the key phases of a consulting engagement (using a framework such as Block's contracting-discovery-feedback-action model and McKinsey's 5-step problem-solving process). Short mini-lecture on consulting vs. management roles, and how consultants add value in tech contexts.
- In small teams, analyze a brief hypothetical scenario ("TechCo needs a new strategy") to identify the "real problem" vs. stated problem (practicing problem definition). Each team will share their problem statement and approach.
- Students form project teams of ~4 members. Teams brainstorm possible technology-focused consulting project topics (guidance provided). By end of class, each team should have a draft idea for their project (e.g., a tech startup's growth strategy, a digital transformation for a traditional firm, etc.). Instructor will circulate to advise teams.

Prep (for **next** class):

- Finalize your team's project choice and gather some background information on the client/industry. Coordinate a brief team meeting to outline your proposed project scope. *Each team should be ready to present a 2-minute pitch of their chosen project at the start of Week 2.*

Read (for **this** class):

- Wickham & Wilcock (2020) – Chapter 1: "The nature of management consulting and how it adds value" & Chapter 2: "Consulting: the wider context and consulting process". Overview of what consultants do, the consulting process model, and consulting in modern context.
- Rasiel (1999) – Part I ("The McKinsey Way of Thinking About Business Problems"). Read Chapters 1–3 (approx. 30 pages) for insight into defining problems, building the approach, and the 80/20 rule. (This will reinforce our class discussion on problem definition and hypothesis-driven thinking.)
- Block (2011) – Chapter 1 "A consultant by any other name" (pp. 1–15). Block's introduction of what it means to be a consultant, and the importance of influence without direct authority. Focus on the mindset and the goal of creating change through consulting.

Optional:

- Browse Block, Chapter 2 "Techniques are not enough," for philosophy on how technical skills must pair with interpersonal skills.

Assignment Due:

- None. (However, by Week 2 each team must email the instructor a one-paragraph description of their chosen project scenario for approval.)

<session date> <(class session)>

<u>Session 2: Contracting & Project Planning</u>

Engaging the client and defining the project. *Contracting phase* – establishing objectives, scope, and roles with the client. Formulating a project proposal/workplan. Ethics and managing client expectations.

In-class activities:

- Each team delivers a 2-minute informal pitch of their chosen project: Who is the client (real or hypothetical)? What is the primary problem or question? What do they envision as the project's scope and deliverable? Class and instructor provide feedback and help refine problem statements.
- Key elements of contracting and project planning. We will cover how to clarify the client's needs and constraints, and define success measures. Concepts from Block's Flawless Consulting are highlighted (e.g., elements of the psychological and technical contract, handling "wants" and "offers"). Also, we discuss writing a compelling proposal that outlines approach, timeline, and team responsibilities.
- Pairs of students role-play a "consultant-client contracting meeting" – one student as consultant asking questions to clarify a project request, the other as client. They will practice reaching agreement on scope and recording key points. A few pairs will reenact their approach for the class to debrief what worked or didn't (e.g., did the consultant ask about underlying issues? did they establish trust?).

Prep (for **next** class):

- Teams should incorporate feedback from their pitch. Begin researching data for your project – identify at least three sources (e.g., industry reports, stakeholder

interviews) you will use. Draft a written Project Proposal (client brief) as per guidelines. (The proposal is due Week 3.)

Read (for **this** class):

- Block (2011) – Chapter 4 "Contracting Overview" & Chapter 5 "The Contracting Meeting". Key steps to establish a "flawless" contract with a client: setting mutual expectations, exploring client needs, and dealing with common contracting "agonies". Pay attention to Block's tips on what to agree on (outputs, time, support required) and how to say no when necessary.
- Rasiel (1999) – Part II ("The McKinsey Engagement: Running a Consulting Project"). Read Chapters on Team focus and client communication – e.g., "The Client is God" and "The Elevator Test". (These chapters share McKinsey best practices on maintaining client focus and communicating a project's vision succinctly.)

Optional:

Assignment Due:

- None due in class. (However, teams should be working on the Project Proposal, due next week.)

<session date> <(class session)>

<u>Session 3: Data Collection & Analysis Techniques</u>

Designing the research approach – qualitative and quantitative data collection for strategic projects. Interviewing clients and stakeholders, gathering market and financial data. Analytical tools and frameworks (e.g. SWOT, competitor analysis, financial modeling) relevant to tech contexts. Applying the 80/20 rule and ensuring analysis is MECE (Mutually Exclusive, Collectively Exhaustive).

In-class activities:

- Lecture/demo on approaches to data collection – primary vs. secondary data in consulting. We discuss conducting effective interviews (drawing from The McKinsey Way and Block's "discovery" phase insights) and using surveys or workshops for qualitative insights. We also explore quantitative analysis fundamentals: basic financial analysis, market sizing, benchmarking, with examples from tech industry (e.g., analyzing user metrics for a software product). The concept of issue trees for structuring analysis is introduced (breaking a problem into sub-questions to systematically gather data).
- Each team chooses one aspect of their project problem and creates an issue tree on the whiteboard. Class does a gallery walk to review each team's issue tree, checking for MECE logic and suggesting improvements. Through this, students practice structuring complex problems and identifying data needs for each branch of the tree.
- Students are given a brief dataset or a summary of findings from a past tech consulting project (e.g., a spreadsheet of a tech startup's revenues and costs, or user engagement statistics). In teams, they analyze the data to draw preliminary insights (e.g., identify trends, key cost drivers, or market segments). We then discuss as a class how these insights could feed into recommendations. Emphasis is on 80/20: focusing on the data that matters most and not over-analyzing everything.

Prep (for **next** class):

- Teams should be in full "data collection" mode for their projects this week. Conduct at least one stakeholder interview or detailed data source review for your project. Start identifying emerging findings or patterns. By next class, each team should prepare 2 to 3 slides (or a brief outline) summarizing their initial findings and hypotheses for solving the client's problem. (This will be presented informally in Week 4 for feedback.)

Read (for **this** class):

- Rasiel (1999) – Selected chapters from Part III ("The McKinsey Way of Working") that relate to data analysis: e.g., "Fact-based Storytelling" and "Interviewing – the art of listening". These chapters offer tips on gathering facts efficiently and the importance of listening during client interviews.
- Wickham & Wilcock – Chapter 7 "Evaluating client capabilities and business opportunities". Learn how to assess a client's internal capabilities and external market to spot opportunities or issues (apply these concepts to your project's tech context).
- Minto (2010) – Part II: "Logic in Problem Solving". Minto discusses how to structure thinking while analyzing problems. Focus on sections about grouping ideas and ensuring logic flows, which will help in organizing your analysis and findings. (This complements our work on issue trees and preparing for the storyline of your recommendations.)

Optional:

Assignment Due:

- Project Proposal (Group) – Due at start of Week 3 class. Each team must submit a 2-3 page consulting proposal for their project. This document should serve as a "client brief," including: background of the client & context, the problem statement, project scope and objectives, proposed approach/methods, and a work plan with timeline. One team member should upload the proposal to the CMS before class. (Graded; 10% of course grade.)
- Instructor will return proposals with feedback by Week 4.

<session date> <(class session)>

<u>Session 4: Synthesis & Developing Recommendations</u>

Turning analysis into insights. Synthesis of qualitative and quantitative findings to generate options. Tools for creative problem-solving (brainstorming techniques, scenario analysis) and decision-making in a client context. Selecting the best strategic recommendation and ensuring it "sticks" (client buy-in and feasibility). Managing scope creep and staying on track.

In-class activities:

- Each team gives a 5-minute update on their project's progress: What data have you gathered? What are 1-2 insights or trends identified? Any revised hypotheses about the solution? And what challenges or questions do you have at this stage? The class and instructor will provide feedback and suggestions (think of it as a mid-project

review). (This informal presentation is part of the Interim Progress grade – the focus is on getting constructive input.)

- Interactive lecture on going from findings to recommendations – we discuss how to logically derive recommendations from analysis. Use Wickham's framework for evaluating options (e.g., criteria-based assessment) and Block's notion of engaging the client in the solution design. We will highlight decision-making in the client context – understanding the client's criteria (cost, time, risk, etc.) and stakeholders. Also introduced: the "SO WHAT?" test – for every finding, ask what it means for the client's decision.
- Using a real tech-case example, we practice a structured brainstorming to generate strategic options. For instance, given a finding "Customer acquisition cost is high," teams brainstorm possible strategies (e.g., new marketing channels, partnerships, product changes). Techniques like SCQA (Situation-Complication-Question-Answer) and logic trees are used to broaden thinking. Each team then shares one potential recommendation for the example case and we discuss how to evaluate its merits.
- Class discussion on handling client input and scope changes – halfway through a project, clients might introduce new information or change priorities. What do you do? We'll role-play a scenario where a client adds a new request mid-project. Students discuss in groups how to respond (renegotiate scope, do quick analysis of new item, etc.) and then compare to best practices (like referring back to the original contracted scope and making trade-off decisions).

Prep (for **next** class):

- Teams should refine their solutions and begin drafting their final deliverables. By next week, prepare a storyline or pyramid outline for your final presentation (main recommendation and supporting points). Bring a draft slide deck or outline to class for the workshop.

Read (for **this** class):

- Wickham & Wilcock – Chapter 11 "Creative approaches to problem solving" and Chapter 12 "Decision-making in the client context". These chapters provide techniques for generating solution ideas and frameworks for choosing among alternatives, including evaluating risk and implementation issues.
- Block (2011) – Chapter 13 "Preparing for Feedback" & Chapter 14 "Managing the Meeting for Action". These chapters guide how to present findings and recommendations to the client. Note Block's advice on organizing feedback meetings and handling resistance: e.g., present data and recommendations succinctly (finish within ~20% of the meeting) to allow time for client reactions.
- Minto (2010) – Chapters 1 to 3 of Part III: "Logic in Writing – The Pyramid Structure". This is core reading on how to structure your recommendation in pyramid form. Focus on how to start with the answer, group supporting arguments, and order them logically. This will directly feed into how you organize your final report and presentation.

Optional:

Assignment Due:

- Interim Progress Update (group, 10% of grade, evaluated based on preparedness and substance of update.) Each team's brief presentation should include: a concise recap of project scope, key findings to date (data analysis highlights), any preliminary recommendations or options identified, and questions/next steps. No separate written submission required (teams may submit their slides for reference). Timely, honest assessment of progress and receptive handling of feedback are part of the evaluation.

<session date> <(class session)>

Session 5: Effective Communication & Storytelling in Consulting

Crafting the consulting storyline. The Pyramid Principle in action – structuring reports and presentations. Designing visual aids (PowerPoint slides, charts) for executive audiences. Delivering recommendations persuasively: presentation skills, handling Q&A, and influencing without authority. Final project clinic and peer feedback.

In-class activities:

- Interactive lecture/demo covering the principles of persuasive communication in consulting. We recap Minto's Pyramid Principle: start with the recommendation, then support with grouped arguments. Instructor shows examples of a good "pyramid" structure vs. a poorly structured one. We also discuss slide design best practices (clarity, simplicity, storytelling visuals) – e.g., how to present data in charts that highlight the key message.
- Each team works on their final presentation deck in class. We allocate ~30 minutes for teams to outline their presentation using the pyramid structure: What is your lead recommendation? What are the 3-4 key supporting points? What evidence for each? Teams sketch this on paper or a whiteboard. Then teams swap with another team and provide peer feedback on the clarity and logic of each other's structure. The instructor rotates among teams to advise on storyline coherence and slide design tips.
- Each team practices a 5-minute segment of their presentation (for example, the introduction or one key recommendation slide) in front of another team or the class, to get feedback on delivery. Focus is on speaking clearly, maintaining eye contact, and explaining the "so what" of each slide. Peers and instructor give constructive critique (e.g., "What I liked about your opening" or "Could you make that point more concise?"). This is a safe space to refine presentation style before the real thing.
- Class discussion on how to handle tough questions and client pushback during a recommendation meeting. We review strategies such as anticipating questions, backing up claims with data (backup slides or appendix), and staying composed if challenged. Each student shares one concern they have about the final presentation and we address it collectively (demystifying the process).

Prep (for **next** class):

- Finalize your team's presentation and written report. Each team should rehearse the full presentation at least once together outside class. Ensure timing is within limits (each presentation will be ~15 minutes + Q&A in Week 6). Print or have accessible any materials needed for submission.

Read (for **this** class):

- Minto (2010) – Part IV (selected): "Writing Executive Summaries and Introductions" (≈15 pages). Provides guidance on writing a concise executive summary – useful for your final report.
- Rasiel (1999) – Chapters from Part III or IV that cover teamwork and final advice: e.g., "Working with Teams" and "Surviving at McKinsey" (≈20 pages). These chapters, while informal, offer tips on teamwork under pressure and maintaining quality to the end.

Assignment Due:

- *No new assignment due.* (Use this week to complete your final deliverables.)

<session date> <(class session)>

<u>Session 6: Final Presentations & Course Wrap-Up</u>

Presentation of strategic recommendations to "client." Course debrief and lessons learned in consulting practice. Next steps for those interested in consulting careers.

In-class activities:

Each team will deliver a ~15-minute presentation of their consulting project, assuming the class and instructor are the client executive audience. This includes: introduction of the client situation, the defined problem, a summary of analysis (key findings), the team's strategic recommendation(s) with rationale, and implementation considerations. After each presentation, we will have ~5 minutes of Q&A where the audience poses questions as if we were the client (testing the strength of the recommendation and analysis). All students are expected to ask questions and provide feedback. *Notes: presentation order will be determined in advance. All team members should participate in the delivery. The presentation and Q&A are graded – see Evaluation for criteria.*

- After each presentation, the instructor will provide brief constructive feedback. Once all are done, we'll discuss common strengths and challenges observed. We celebrate the completion of the projects and reflect on the experience.
- Interactive reflection on what was learned about consulting and about working in tech contexts. We revisit the course learning outcomes and discuss which skills students feel they have developed (e.g., "How comfortable are you now with structuring a problem? With giving a client recommendation?"). Students are encouraged to share key takeaways.
- (If time permits) A short discussion on careers in consulting (especially in technology sectors) – tips on recruitment, further resources for practice (case interview prep, etc.), and how to continue building consulting skills beyond this course.

Prep (for **next** class):

- N/A

Read (for **this** class):

- None.

Optional:

- N/A

Assignment Due:

- Presentation in class Week 6 (slides due on CMS before class). 20% of grade total, with both presentation and written materials graded.
- **(3 weeks after this class):** Individual Final Report due, 40% of grade total. See "Written Assignments" for more details.

Written Assignments/Projects and Exam[s]: Descriptions

All written assignments should be submitted via the course CMS by the deadline. Unless otherwise specified, use 12 point font, single-spacing (for proposals/reports), and professional formatting. Follow APA style or similar when referencing data or external information in your reports. Appendices may be included for supplemental data analysis. For group deliverables, one submission per team; include all team member names.

Due Date	
<Due Date>	<u>Project Proposal (Client Brief)</u> This 2-3 page document outlines your team's planned consulting engagement as if delivering a proposal to the client. It should clearly state: the client background and context (industry, market, any relevant tech trends), the problem statement or opportunity being addressed, the project scope (key questions to be answered, any areas explicitly out-of-scope), your approach and data collection plan (how you will gather information – interviews, data sources, analysis methods), and the deliverable format (e.g., a presentation with strategic recommendations and implementation roadmap). Essentially, it answers, "What are we going to do, how, and why?" This assignment is graded on clarity, completeness, and professionalism. A strong proposal will demonstrate understanding of the client's needs, a logical project plan, and feasibility given our 6-week timeline. (See grading criteria below.) The proposal sets the stage for your project – think of it as your consulting team's contract with the client. *Max length: 3 pages* *Value: 10% (group)*
<Due Date>	<u>Interim Progress Update</u> Mid-way through the course, your team will present a brief progress report in class (5 minutes, with 2-3 slides recommended). There is no separate written submission (the slides you use will suffice). The goal is to articulate preliminary findings and get feedback. Include: a reminder of your project's focus, a snapshot of data collected (e.g., "interviewed 5 customers, analyzed sales data from 2018-2022"), any insights or patterns discovered so far, and any early ideas for recommendations. Also state challenges or questions for the class/instructor (e.g., "Struggling to get data on competitor pricing – any suggestions?"). Grading is primarily for completing the task thoughtfully and demonstrating progress. This is an opportunity to course-correct if needed and ensure you're on track for the final deliverable. Each team member should contribute to the update. *Max length: 5 slides (presented over 5 minutes)* *Value: 10% (group)*

Due Date

<Due Date>

Final Presentation

A 15-minute in-class group presentation to the "client" (class and instructor) summarizing your project and delivering your recommendation. This should be a professional, boardroom-style presentation using PowerPoint (or similar). It will be evaluated on content (clear statement of problem, robust analysis, compelling recommendation that follows from evidence) and delivery (organization, clarity of visuals, speaking effectiveness, and ability to answer questions). All team members must take part in the presentation. You are encouraged to practice in advance. On presentation day, think of the instructor as the client CEO – be prepared for questions probing your assumptions, data, and next steps. Marks will reward presentations that are persuasive, concise, and demonstrate a command of the material. Visual aids should follow consulting best practices discussed in class (e.g., clear charts, minimal text, impactful headlines).

Max Length: 15 minutes, no slide limit
Value: 20% (group)

<Due Date>

Final Report

Each student will individually produce the final deliverable for their consulting project, due three weeks after the last class. While the group presentation delivered core findings and recommendations, this expanded individual report builds on that foundation to showcase deeper independent analysis and reflection. You may choose a Word document or slide deck format (with appropriate supplementary text), but ensure it stands on its own as a cohesive, self-explanatory client deliverable.

At a **minimum**, your report should include:

- A concise overview of the project context, core insight(s), and recommended action(s).
- Key findings from your research – both what was discussed in the presentation and additional points discovered or explored after the final class. You should try to provide relevant data (e.g., market research, financial projections) to substantiate your claims, referencing any new or supplementary sources that strengthen your recommendations.
- A clear statement of your proposed strategy or solution, tied directly to the evidence gathered. The strategy should be actionable (e.g., specific timelines, target segments, or metrics) and feasible, addressing any constraints you identified.
- How the client could realistically implement your recommendations – proposed milestones, required resources, and risk mitigation. Where relevant, you should integrate additional frameworks or deeper-level analysis that either expands upon or clarifies your group's final presentation.
- Explicit highlights for any new perspectives or expanded analyses you performed individually. This might include, for example, analyzing an alternative scenario, refining cost estimates or ROI calculations, exploring new market data, or integrating an additional consulting framework.

Due Date

- A summary of the long-term outlook for the client, noting any future research, pilot testing, or strategic considerations.

This assignment is due three weeks after the final class presentation.

Max length: 3,000 words (document or slides)
Value: 40% (individual)

Evaluation of Written Assignments/Projects and Exams

All assignments will be evaluated against criteria of clarity, analytical rigour, application of course frameworks, and professionalism. Below are specific quality considerations for each major deliverable:

1. **Project Proposal**: Should clearly identify the client's problem and scope. We will look for a well-defined problem statement (is it specific and actionable?), evidence of initial client/industry understanding, a logical plan (are the proposed analyses appropriate and feasible?), and clarity of writing. An "A" grade proposal leaves the reader with a clear picture of what the team will do and confidence that the team has a handle on the project. Proposals that are vague on scope or methodology, or not tailored to a technology context, will score lower.
2. **Interim Update**: Graded more on effort and progress than polish. High marks if the team demonstrates substantial work done (data gathered, some analysis performed) and self-awareness of what needs to happen next. We also consider how well the team incorporated early feedback (did you adjust your approach based on Week 2 input?). Low marks if a team appears significantly behind or presents findings without any analysis. Timely presentation and responsiveness to questions are part of the evaluation. (Late or missing updates receive penalties.)
3. **Final Presentation**: We evaluate content (soundness of recommendation, strength of supporting evidence, and coherence of the argument) as well as delivery (engaging opening, logical flow, effective visuals, teamwork in presenting, time management). Does the presentation follow a clear storyline (e.g., SCQA or Pyramid)? Is the recommendation front and center? Are claims backed by data (cited or from analysis)? Did the team address how the recommendation can be implemented and potential risks? Were presenters confident, clear, and professional? Did the team handle Q&A adeptly (listening to the question, answering succinctly, admitting if they don't know something or referring to backup data)? Teams that communicate insights succinctly (heeding Block's advice to not drown the client in detail) and engage the audience will do well. Visual aids should enhance, not distract – readability and meaningful charts matter.
4. **Final Report**: This report is graded on its overall clarity, analytical rigor, use of course concepts, and evidence of individual insight beyond the material covered in the group presentation. It should demonstrate a thorough understanding of the client's situation, make well-supported recommendations, and address how the client can feasibly implement them. While you may reference data and frameworks introduced by your team, **it is essential to strengthen and expand upon that groundwork, illustrating your personal engagement with the project and independent thinking**. The best submissions will not merely restate the group's final presentation but rather extend it with deeper analysis – examining alternative strategies, incorporating additional research, or refining the implementation roadmap. A strong report will be well-structured (showing logical flow from situation analysis to final recommendations), concise yet rich in content, and polished in style. Where appropriate, your writing should weave in ideas from

the assigned readings and concepts discussed in class (e.g., contracting principles, issue trees, structured communication). Finally, the report must be professionally formatted and properly cited, suitable for a senior executive audience evaluating your strategic consulting proposal.

Please note that there are no set grading criteria for the optional reflection paper. See Student Preparation for Class and Class Participation: Expectations for details.

All deliverables are expected on or before the due date and time. Late submissions will incur a penalty of **5% of the assignment grade per day** late (or portion thereof) unless prior arrangements have been made with the instructor *before* the deadline. For example, a report submitted 2 days late that would have scored 80% would instead receive 70%. In-class presentations must occur on the scheduled day; missing a presentation without prior approval will result in a zero for that component (extraordinary circumstances will be handled on a case-by-case basis, and may require documentation).

After the final project, each student will complete a confidential peer evaluation form rating their team members' contributions. These evaluations may impact individual grades on group assignments. Significant disparities in contribution can result in an individual's project grade being adjusted downward (or upward) relative to the team grade. The expectation is that all team members contribute fairly and communicate openly to resolve any issues. The instructor is available to mediate team conflicts if they arise; please bring concerns early (don't wait until the end).

Calculation of Course Grade

In this class, final course grades will be determined by the following process: *<Spell out how course grades will be computed and assigned, particularly if numerical or percentage grades are used for assignments and exams during the term. The Schulich School does not have a standard policy for translating percentages into letter grades.>*

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

<Note (to be deleted): Keep/delete the program-specific and course-specific information below as appropriate. Take off highlighting for sections that are kept.>

<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. *<Note: For elective courses, replace the preceding sentence with:* To keep final grades comparable across courses, elective courses are expected to have a mean grade between 5.2 and 6.2.>

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

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

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

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

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

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

<Note: Keep/delete the sections below depending on whether or not this course has exams.>
Exams (Absence from)
Mid-term. Students who miss a mid-term examination must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file.
Final. Within 24 hours of missing a final examination, students must contact the (for Masters) Director of Student Services, (for Undergraduates) Associate Director, Undergraduate Programs Unit at (416) 736-5060 and must also contact their course instructor. Formal, original documentation regarding the reason for missing the exam must be submitted to the Director of Student Services, Associate Director, Undergraduate Programs Unit (SSB Room W262) within 48 hours of missing the final exam. Students who miss a final exam due to illness must have their doctor complete an "Attending Physician's Statement." For a copy of this document, visit:
http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf

Quick Reference: Summary of Classes, Activities and Deliverables

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)	Written Preparation
1. <Date> Introduction to Consulting & Project Kickoff	- Team formation; brainstorm project ideas - Mini case: Identify real vs. stated problem in a tech scenario	Wickham Ch.1-2 (consulting overview) Rasiel Part I (chap. 1-3, McKinsey problem solving) Block Ch.1 (what is a consultant)	None
2. <Date> Contracting & Project Planning	- Team project idea pitches (2 min each) + feedback - Role-play a client–consultant contracting meeting	Block Ch.4-5 (contracting basics) Rasiel Part II (select chapters on client communication)	Project proposal draft – teams refine scope (proposal due Week 3)
3. <Date> Data Collection & Analysis Techniques	- Issue tree workshop: teams build issue trees for their project - Data analysis exercise with provided dataset	Rasiel Part III (chapters on fact gathering & interviewing) Wickham Ch.7 (evaluating client capabilities) Minto Part II (logic in problem solving)	Project Proposal due (start of Week 3 class) Begin data collection for project
4. <Date> Synthesis & Developing Recommendations	- Team progress presentations (5 min each) + feedback - Brainstorming solutions for a case scenario	Wickham Ch.11-12 (creative solutions, decision-making) Block Ch.13-14 (preparing feedback, running meeting) Minto Part III (pyramid structure for writing)	Interim Progress Update (presented in class Week 4) Start drafting recommendation ideas
5. <Date> Communication & Storytelling (The Pyramid Principle)	- Slide deck workshop: peer critique of team storylines - Practice presenting key parts of final report	Wickham Ch.15 (communication & presenting ideas) Minto Part IV (executive summaries) Rasiel Part III/IV (teamwork, final insights)	
6. <Date> Final Presentations & Wrap-Up	- Team final presentations (15 min each) + Q&A - Course debrief and lessons learned discussion	*Light review:* Minto on exec summary (optional), Rasiel on teamwork (optional)	Final Presentation in class Week 6 Final Report due 3w after this class
	NO CLASS (Reading Week)		
7. <Date> <Topic(s)>			
8. <Date> <Topic(s)>			
9. <Date> <Topic(s)>			

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)	Written Preparation
10. <Date> <Topic(s)>			
11. <Date> <Topic(s)>			
12. <Date> <Topic(s)>			

SUBJECT: Library Statement for OMIS 6015: Strategic Consulting in Technology Contexts: Lifecycle, Analysis, and Communication
FROM: Angie Liann, Teaching & Learning Librarian / Business Liaison Librarian
DATE: June 16, 2025

OMIS 6015: Strategic Consulting in Technology Contexts: Lifecycle, Analysis, and Communication

York University Libraries (YUL) will be able to support the proposed course, OMIS 6015: Strategic Consulting in Technology Contexts: Lifecycle, Analysis, and Communication. This course introduces strategic consulting skills for technology-driven business environments. YUL has a strong collection of electronic and print periodicals, books, and databases that will help students conduct secondary research for this course.

All the course materials can be accessed through the YUL's Omni search interface. It is recommended to place the textbooks and readings on reserve via the online reserves request form. YUL has an extensive collection of print and eBooks on the course topics.

YUL's Omni search interface can be used to locate scholarly, trade, and newspaper articles. Students may consult the Omni search guide for tips on using this discovery layer to find relevant articles. *Proquest Business* and *Business Source Complete (BSC)* are two core databases that provide subject-specific scholarly and trade business article publications. *Factiva* and *Nexis Uni* are two excellent databases that provide access to thousands of business news publications.

Students will have access to key business databases such a*s Capital IQ; Passport; Statista; IBISworld;* and *Marketline Advantage.* A complete list of YUL's business databases can be viewed at Business Resources A-Z. Additional information on relevant article databases can be located on YUL's Business Articles guide,

Students are encouraged to learn more about various databases the library subscribes to by consulting YUL's well-developed and curated research guides and Step-by-Step Business Research Tutorials. These guides and tutorials list librarians' recommended resources for most asked research tasks.

Students will have access to research help and consultation services both in-person and online. Students have the options to visit the reference desk at Peter F. Bronfman Business library, send an email to bronfref@yorku.ca, use the online chat service, or book a Zoom consultation with a business librarian.

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:
Technology MBA Program

2. Responsible Unit:
OMIS

3. Subject Code (Rubric) and Course Number:
OMIS 6016

4. Credit Value:
1.5

5. Long Course Title:
Technology Project Management

6. Short Course Title:
Technology Project Management

7. Effective Term/Calendar Year:
Summer 2027

8. Language of Instruction:
English

9. Calendar (Short) Course Description:

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

Course credit exclusion:
SB/OMIS 6750 (3.0)

10. Expanded Course Description:

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

This course equips students with the critical tools and methodologies needed to manage complex technology projects from inception to completion successfully. Topics covered include project planning, agile methodologies, risk assessment, resource allocation, stakeholder communication, and the integration of emerging technologies in project workflows.

Participants will explore real-world case studies, engage in hands-on simulations, and develop actionable strategies for managing teams, budgets, and timelines in fast-paced tech environments. By the end of the course, learners will be adept at leading projects that drive technological transformation and deliver measurable business value.

Students will learn the basic concepts of project management and will be exposed to several method of project management. In addition, students will learn the organizational and interpersonal aspects of project management. At the end of the course students will have been provided with sufficient knowledge to operate effectively both as a project leader and as a member of a project team.

11. Course Learning Outcomes:

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

- Understand the need for a formal project management methodology
- Define project scope
- Estimate project budget and schedule
- Select and govern a project
- Manage a project team
- Risk management and problem solving
- Leverage Agile and Scrum methodologies
- Develop a project plan using project management software

12. Rationale:

This new elective is based on OMIS 6750 Project Management. However, this will be a 6-week version more focused on technology-based projects and only offered to Technology MBA students.

13. Evaluation:

Assignment/Task	Quantity	% Weight	Total %	Author
Group Discussions	3	3%	9%	Group / Individual
Class Participation	1	5%	5%	Individual
Weekly Quizzes	4	6.5%	26%	Individual
Case Study	1	20%	20%	Individual
Group Project	1	35%	35%	Group
Peer Evaluation	1	5%	5%	Group
			100%	

14. Integrated Courses:

Not applicable

15. Cross-listed Courses:

Not applicable

16. Enrolment Notes:

This course is open only to Technology MBA students. This course is closed to all other master's students.

17. Faculty Resources:

David Elsner, Vibhuti Dhingra, Henry Kim, Hila Cohen

18. Physical Resources:

Regular classroom

19. Bibliography and Library Statement:

Required textbook:

Project Management: A Socio-Technical Approach: 2024 Release, by Larson and Gray, McGraw-Hill.

- eBook: ISBN10: 1264554338 | ISBN13: 9781264554331
- Print: ISBN10: 1266912487 | ISBN13: 9781266912481
- Connect: ISBN10: 1260242374 | ISBN13: 9781260242379

The following chapters will be used as reference material:

Week 1: Foundations
- Ch. 1: Modern Project Management
- Ch. 3: Organizational Structure & Culture **(recommended reading if time permits)**

Week 2: Project Selection & Scoping
- Ch. 2: Strategy & Project Selection
- Ch. 4: Defining the Project

Week 3: Estimation & Planning
- Ch. 5: Estimating Time & Cost
- Ch. 6: Project Planning (CPM, scheduling)

Week 4: Managing Technology Teams
- Ch. 10: Leadership
- Ch. 11: Managing Project Teams
- (Optional Ch. 12 if vendor management is included) **(recommended reading if time permits)**

Week 5: Agile & Modern Tech Methods
- Ch. 13: Agile PM (Scrum, sprints, hybrid)

Week 6: Execution, Risk & Control
- Ch. 7: Risk Management
- Ch. 14: Monitoring & Controlling
- Ch. 15: Project Closure **(recommended reading if time permits)**

Schulich
School of Business
York University

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

20. Instructors and Faculty Coordinator

Initial instructor:

David Elsner

Alternative instructors:
See #17

Course coordinator:

David Elsner

21. Specializations

Primary area or specialization:

OMIS

Secondary areas or specializations:

Not applicable

22. Student Contact and Enrolment

Contact hours:

18 contact hours

Maximum enrolment:

45 Students

Expected enrolment:

25-45 students

Evidence for enrolment expectations:

Enrolment for OMIS 6750 in the MBA program is typically between 25-45 students.

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

a. Reflection of Equity, Diversity, Inclusion, Decolonization, and Indigenization in Course Content and Delivery

- Content (Assigned Readings, Materials, Case Studies, etc.):
    1. Assigned Readings and Materials:
        - Include case studies and readings that highlight diverse cultural, social, and economic contexts in project management.
        - Feature authors and thought leaders from underrepresented groups to provide varied perspectives.
        - Incorporate Indigenous knowledge systems and practices, emphasizing their relevance to modern project management.
    2. Case Studies:
        - Use examples that showcase projects led by diverse teams or those addressing social justice issues.
        - Highlight projects that involve Indigenous communities, ensuring their voices and contributions are central to the narrative.
    3. Decolonization and Indigenization:
        - Leverage materials that challenge colonial frameworks and promote Indigenous ways of knowing and being.
        - Include resources that discuss the impact of colonization on project management practices and explore strategies for decolonizing these processes.

- Delivery (Inclusivity and Valuation of Diverse Perspectives):
    1. Inclusive Teaching Practices:
        - Foster an environment where all students feel valued and respected, encouraging open dialogue and diverse viewpoints.
        - Use collaborative learning methods that allow students to share their unique experiences and insights.
    2. Representation:
        - Ensure discussions represent a wide range of backgrounds and experiences.
        - Highlight the contributions of marginalized groups in the field of project management.

3. Decolonization and Indigenization in Delivery:
    - Incorporate Indigenous knowledge in discussions when applicable.
    - Use teaching methods that align with Indigenous pedagogies, such as storytelling and experiential learning.
4. Assessment and Feedback:
    - Assessments will allow for diverse expressions of knowledge, such as oral presentations or community-based projects.
    - Provide constructive feedback that is culturally sensitive and encourages growth.

b. Contribution to Students' Learning on Equity, Diversity, Inclusion, and Decolonization

1. Understanding Diverse Perspectives
    - By incorporating case studies and examples from various cultural and social contexts, students learn to recognize and value diverse perspectives.
    - Students gain insights into how cultural differences and social inequities can impact project stakeholders, processes, and outcomes.
2. Building Inclusive Leadership Skills
    - The course teaches students how to foster inclusive environments within project teams, ensuring that everyone feels valued and heard.
    - Students learn strategies for managing and leveraging diversity to enhance team performance and innovation.
3. Applying Equity in Project Planning
    - Through assignments and discussions, students explore how to identify and address systemic inequities in project design and implementation.
    - They learn to allocate resources and make decisions that are fair and equitable for all stakeholders.
4. Decolonizing Project Practices
    - The course challenges students to question frameworks and adopt approaches that respect different knowledge and practices.
    - Students learn to engage meaningfully, emphasizing collaborative, community-driven approaches.
5. Ethical and Socially Responsible Decision-Making
    - By addressing unconscious bias, students develop the ethical awareness needed to navigate social contexts in their projects.
    - They are encouraged to critically reflect on their own roles and responsibilities as project managers.

6. Real-World Application
   - Practical exercises, like creating project charters and stakeholder engagement plans, allow students to apply EDI and decolonization principles in real projects.
   - The group project fosters collaboration among diverse peers, helping students experience the benefits and challenges of inclusive teamwork.

24. Human Participants Research

N/A

25. Conditions for Approval

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

a) The Area is deleting courses with at least the same total number of credits.
Part of a curriculum revamp. No net new credits.

b) Provide a convincing case for the proposed course.
This is a course that was strongly recommended by the Tech MBA Advisory Committee for a redesigned curriculum.

Originator:

	March 4, 2025
Signature	Date
David Elsner	OMIS
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.

Vibhuti Dhingra	OMIS
Markus Biehl	OMIS
David Johnston	OMIS
Julian Yeomans	OMIS
Isik Bicer	OMIS
Moren Levesque	OMIS

Approvals

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

_____ _____
Signature Date

_____ _____
Name of Coordinator or Director Area or Specialization

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

_____
Signature Date

_____ _____
Name of Program Director Program

Program Committee:

Schulich
School of Business
York University

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

Kevin Tasa	November 20, 2025
Signature	Date
Kevin Tasa	Master Programs Committee
Name of Committee Chair	Committee

OMIS 6016 1.50: Technology Project Management

Course Outline
Term taught is TBD

Instructor
David Elsner
G234 MB
Tel: 647-998-1587
Email: delsner@schulich.yorku.ca
Office hours: TBA

Admin
Jennifer Brethour
S337N SSB
416-736-2100 x44681
jenab@schulich.yorku.ca

David Elsner David Elsner is an Adjunct Professor of Operations Management and Information Systems and the Associate Program Director of the Master of Business Analytics program (MBAN) at the Schulich School of Business. His areas of expertise are in Business Analytics, Data Visualization, and Project Management. He is also the president of DHE Consulting, providing training, consulting, and analytical solutions to organizations.

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

Brief Description

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

Prerequisite: None.

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Course Learning Outcomes

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

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

- Understand the need for a formal project management methodology
- Define project scope
- Estimate project budget and schedule
- Select and govern a project
- Manage a project team
- Risk management and problem solving
- Leverage Agile and Scrum methodologies
- Develop a project plan using project management software

Organization of the Course

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

This course equips students with the critical tools and methodologies needed to manage complex technology projects from inception to completion successfully. Topics covered include project planning, agile methodologies, risk assessment, resource allocation, stakeholder communication, and the integration of emerging technologies in project workflows.

Participants will explore real-world case studies and develop actionable strategies for managing teams, budgets, and timelines in fast-paced tech environments. By the end of the course, learners will be adept at leading projects that drive technological transformation and deliver measurable business value.

Pedagogy

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

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

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

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

Deliverables at a Glance

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

Assignment/Task	Quantity	% Weight	Total %	Author
Group Discussions	3	3%	9%	Group/Individual
Class Participation	1	5%	5%	Individual
Weekly Quizzes	4	6.5%	26%	Individual
Case Study	1	20%	20%	Individual
Group Project	1	35%	35%	Group
Peer Evaluation	1	5%	5%	Group
		TOTAL	100%	

Course Material

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

Project Management: A Socio-Technical Approach: 2024 Release, by Larson and Gray, McGraw-Hill.

- eBook: ISBN10: 1264554338 | ISBN13: 9781264554331
- Print: ISBN10: 1266912487 | ISBN13: 9781266912481
- Connect: ISBN10: 1260242374 | ISBN13: 9781260242379

Course website

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

Copyright

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

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

Instructional Methods

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

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

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

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

Student Preparation for Class and Class Participation: Expectations

Preparation
Be prepared to review the in-class material and complete the graded assignments each week. Each week's material will build on the previous week, so it is important that you have reviewed and understand the previous course material. Seek help when needed. Class slides will be posted on Canvas one week prior to each class.

Class Participation
All students are strongly encouraged to actively participate in class discussions, ask questions, provide relevant and current examples, or challenge the perspectives of your peers and the instructor. This is an opportunity for you to develop your communication, critical analysis, and presentation skills.

Late Assignments
Deadlines are critical for this class. A late assignment will result in a zero for that assignment. Please make sure that you are aware of the deadlines and speak to the instructor in advance of any potential issues that would prevent an assignment being submitted on time. Extensions will only be granted in exceptional circumstances.

Coursework
Coursework should be submitted through Canvas.

Weekly Lectures:
The instructor will post lecture slides and videos to Canvas for each of the 6 weeks of the course. These slides and videos will vary in length depending on the material. It is your responsibility to watch each of the videos.

Use of Mobile Devices, Laptops, etc. during class
Learning research shows that unexpected noises and movement divert and capture people's attention, which means you are affecting everyone's learning experience if your cell phone, laptop, etc. makes noise or is visually distracting during class. For this reason, I ask you to mute your devices during class, and then unmute when you are ready to participate.

Class-by-Class Syllabus

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

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

Class 1 – Introduction and Modern Project Management

Discussion:

- Overview of Project Management
    - Definition and Importance
    - Project vs. Operations
    - Key Stakeholders in a Project
- Project Life Cycle & Process Groups
    - Initiation, Planning, Execution, Monitoring & Control, Closure
- Project Management Methodologies
    - Waterfall vs. Agile vs. Hybrid Approaches

Textbook:

- Chapter 1

Readings and Videos:

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

Class 2 – Project Initiation and Planning

Discussion:

- Project Initiation
    - Business Case & Feasibility Analysis
    - Project Charter: Purpose & Key Components
    - Identifying Project Stakeholders (Stakeholder Analysis)
- Project Planning
    - Defining Project Scope (Scope Statement, WBS)
    - Setting SMART Goals & Objectives
    - Risk Management Planning

Textbook:

- Chapter 2, 3, 4

Readings and Videos:

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

Class 3 – Scheduling & Budgeting

Discussion:

- Project Scheduling Techniques
    - Work Breakdown Structure (WBS)
    - Gantt Charts & Critical Path Method (CPM)
    - Resource Allocation & Dependencies
- Budgeting & Cost Estimation
    - Estimating Costs (Bottom-up, Top-down)
    - Budgeting Strategies & Contingencies
    - Earned Value Management (EVM) Basics
- Software Tools for Scheduling & Budgeting
    - Microsoft Project, Trello, Asana, Monday.com

Textbook:

- Chapter 5, 6, 8, 9

Readings and Videos:

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

Class 4 – Risk, Quality, and Communication Management

Discussion:

- Risk Management
    - Identifying & Assessing Risks (Risk Matrix)
    - Risk Response Strategies (Avoid, Mitigate, Transfer, Accept)
- Quality Management
    - Quality Planning & Assurance
    - Key Performance Indicators (KPIs) & Metrics
- Communication & Stakeholder Management
    - Communication Plan Development
    - Managing Expectations & Conflict Resolution

Textbook:

- Chapter 5, 6, 8, 9

Readings and Videos:

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

Class 5 – Execution, Monitoring, and Control

Discussion:

- Project Execution Strategies
    - Agile vs. Traditional Execution
    - Team Leadership & Conflict Resolution
- Monitoring & Control
    - Key Performance Metrics & Dashboards
    - Change Management & Issue Resolution

- Project Meetings & Reporting
- Daily Stand-ups, Status Reports, and Escalation Processes

Textbook:

- Chapter 10, 11, 13, 15

Readings and Videos:

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

Class 6 – Project Closure & Lessons Learned

Discussion:

- Project Closure Process
    - Final Deliverables & Sign-off
    - Lessons Learned & Knowledge Transfer
    - Celebrating Project Success
- Professional Development in Project Management
    - Certifications (PMP, CAPM, PRINCE2, Agile, Scrum)

Textbook:

- Chapter 14

Readings and Videos:

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

Written Assignments/Projects

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

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

Weekly Quizzes | Value 4 x 6.5% = 26% (Individual)
In four weeks, you will be required to complete a short online quiz in Canvas that will be based on that week's assigned modules and readings.

Each quiz will contain 17 matching, multiple choice, ordering, and true/false questions and will have a time limit of 15 minutes. The quiz is open book.

Be prepared to answer the quiz questions by having your lecture slides and textbook open and easily accessible.

The quizzes will be at the beginning of the class. This quiz is to be taken in-class with your laptop.

The questions are randomized from a question bank, so no two quizzes will be identical.

In the weeks with a quiz, the lecture will begin after the quiz.

NOTE: You will only see a submission confirmation upon completion. Your responses, correct answers, and question feedback will be available the day after the quiz.

Class Participation | Value = 5% (Individual)
Students are expected to participate in discussions and activities during lectures. Your participation will be evaluated on the extent to which you demonstrate an understanding of the course content and contribute relevant facts, questions, interpretations, examples, frameworks, and points of view.

The class participation grade is not just to provide you with an incentive to get involved in discussions and share your perspective, but also demonstrate your understanding of the material and your persuasive abilities. Thoughtful questions, rigorous analysis, strong oral presentation skills, and the ability to "think-on-your-feet" are crucial skills. The following questions will be considered in grading participation:

- Does the student attend all classes and participate in discussions?
- Is the student prepared to report facts, analyses, and conclusions?
- Do comments interpret or integrate facts using theories, concepts, and analytical tools presented in the readings and lectures?
- Is the student an effective communicator? Are comments presented in a concise and convincing manner?
- Does the student listen to other comments and able to build on and evaluate other comments? Does the student learn from and show respect for other speakers and their points of view?

Students that are not present for two or more classes will be assigned a class participation grade of 0.

Case Study | Value = 20% (Individual)
The purpose of the case study analysis is to demonstrate that you can think through a real-life project management problem by applying the course learnings in a logical, professional, ethical, and informed manner.

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

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

Each case study is worth 20% of the final grade. The marking rubric will be in the module PPT in the week the case study is assigned.

Group Discussions | Value 3 x 3% = 9% (Group)
There will be three Group Discussions in this course, each marked out of 3 points. In your groups, students will be asked to discuss questions from a chapter Snapshot from Practice. Your contributions to the Group Discussions will consist of an original posting and a response to other students' postings. Each Group Discussion is open for five and a half days.

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

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

Group Project | Value = 35% (Group)
Students will work in their groups to select a project to assess, plan, and execute.

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

Deliverable will be:
- Report containing the detailed project plan.
- 12-minute group presentation of the report.

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

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

Group Project Peer Evaluation | Value = 5% (Group)
Team peer evaluation provides a structured learning process for students to critique and provide feedback to each other on their project work. It helps you develop skills in assessing and providing feedback to others, and also equips you with skills to self-assess and improve your own work.

Peer assessment can:
- Empower students to take responsibility for and manage their own learning.
- Enable students to learn to assess and give others constructive feedback.

- Enhance students' learning through knowledge diffusion and exchange of ideas.

Peer evaluations will be used to individualize grades and to provide teams with a means of communicating challenges to your advisors. All students must complete a peer evaluation of their team members. All peer ratings are kept confidential. Students will work together to choose simple, fair criteria for rating each member

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

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

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

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

Academic honesty

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

Quizzes (Absence from)

Students who miss an Exam must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file. Students who miss an Exam due to illness must have their doctor complete an "Attending Physician's Statement." For more details, see: http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf.

Accommodations

For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services. Students are advised to make the instructor aware of any accommodations required, so the instructor can provide those accommodations on a timely basis. For counseling and disability services, contact Student Services or see http://www.yorku.ca/cds/.

MEMORANDUM

York University Libraries

To: Henry M. Kim, Area Coordinator and Associate Professor, OMIS, Schulich School of Business

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

Date: May 9, 2025

Subject: Library Statement – OMIS 6016: Technology Project Management

Summary

York University Libraries (YUL) is well positioned to support the proposed course which covers the strategic, organizational and operational aspects of managing technology-based projects. Students will learn to manage the technical, behavioral, political and cultural aspects of temporary groups performing unique tasks. Topics covered: defining deliverables, formulating project strategy, effective group organization, and management, dynamically allocating resources, managing without authority and resolving conflict. Traditional cost and time management techniques are covered using Microsoft Office and open-source, free project management software. Faculty and students can make use of an array of library resources and services to meet their research and learning needs. This statement highlights offerings related to the major themes of the course. It also brings attention to collections of interest from connected fields such as computer science and information technology.

Collections

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

- Project management, Project management – Methodology, Agile project management, Technological Innovations – Management, Information technology – Management, Leadership, Communication in management, Stakeholder management, Organizational behavior, Teams in workplace -- Management, Risk management and Time management etc.

The required textbook listed in this course proposal and outline that is not currently in our collections will be ordered and added to our collections before the course is delivered. It is recommended that the instructor place it on reserve to ensure equitable access for students. The Libraries have recently acquired **Sage Business Cases**, and instructors are encouraged to explore relevant cases that are freely accessible to students. It is recommended that the instructor use the Copyright Office's Course Reading List/Syllabus Review Service to ensure that the terms of use for the various materials allow for the content to be used in a course. Their staff can also assist in creating permanent links to library content, which can be embedded in Canvas for easy student access.

The Omni single-search interface provides students with access to a wide range of materials, including books, book chapters, articles, dissertations, streaming media, etc. Library users may also request items from partner libraries through Omni. Based on the librarian's review of class themes and weekly topics, a tailored selection of electronic databases of interest for this course are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings.

Business & Technology Publication Databases:

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

Newspaper/ Magazine Databases:

- Factiva
- Nexis Uni
- Press Reader

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.

Research Guides of Interest:

- Step-by-Step Business Research Tutorials
- Information Technology Guide
- Computer Science Guide
- Business Citation Guide

Research Help

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

Accessibility Services

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

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
Technology MBA Program

2. Responsible Unit
OMIS

3. Subject Code (Rubric) and Course Number
OMIS 6018

4. Credit Value
1.5

5. Long Course Title
Modern IT Architecture

6. Short Course Title
Modern IT Architecture

7. Effective Term / Calendar Year
Summer 2027

8. Language of Instruction
English

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9. Calendar (Short) Course Description

This course equips future technology-savvy managers with the vocabulary and mental models needed to evaluate and design contemporary IT architectures. Students learn how hardware economics (Moore's Law), cloud and serverless software, internet-telecommunications infrastructure, and cyber-risk management interact to shape strategic decisions and customer value. Through lectures, discussions, and hands-on assignments,

participants develop an integrated architectural blueprint aligned with organizational growth objectives. Available to Technology MBA and MBA students.

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10. Expanded Course Description

Modern IT Architecture surveys the full technology stack—processing hardware, modern software practices, network & telecom infrastructure, and cybersecurity—through a managerial lens. Students trace the economic logic of Moore's Law, assess strategic trade-offs between on-premise, cloud, and serverless deployment, and map how connectivity choices influence performance, compliance, and risk. Weekly topics build toward a capstone project in which teams produce an architectural blueprint for a real organization, articulating how technical choices advance business goals. Readings draw heavily on the 2024 edition of *Information Systems* (Gallaugher) and curated multimedia content. By course end, participants can speak fluently with both executives and technologists, defend architecture recommendations, and anticipate emerging shifts in the digital infrastructure landscape.

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11. Course Learning Outcomes

Upon completion, students will be able to:

1. **Link hardware economics to strategic planning**—explain how ongoing cost-performance gains influence investment timing and competitive positioning.
2. **Translate modern software practices into business value**—describe how contemporary development / deployment models improve agility and cost efficiency.
3. **Recommend deployment models that maximize return**—justify on-premise, cloud, or serverless choices by balancing scalability, risk, and TCO.
4. **Align network capabilities with customer and regulatory needs**—analyze how telecom decisions affect service quality and compliance.
5. **Integrate cyber-risk management into technology strategy**—evaluate safeguards that protect revenue and reputation.
6. **Present an integrated architectural blueprint**—develop and defend a cohesive architecture that supports strategic growth.

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12. Rationale

Technology MBA students requested deeper coverage of the "plumbing" behind digital strategy. While the core IS course reviews concepts at a high level, no existing elective focuses on the architectural integration of hardware, software, networks, and security. Modern IT Architecture fills that gap, leveraging Schulich's in-house expertise (e.g., blockchain.lab) and mirroring content found in leading MBA tech tracks at MIT and Berkeley.

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13. Evaluation

Assignment / Task	% Weight	Author
Class Participation	15 %	Individual
Vibe Coding Assignment	30 %	Individual
In-class Quiz	15%	Individual
IT Architecting Project	40 %	Group
Total	**100 %**	

14. Integrated Courses

Not applicable.

15. Cross-listed Courses

Not applicable.

16. Enrolment Notes

Open to Technology MBA and regular MBA students; closed to other master's programs.

17. Faculty Resources

Henry M. Kim (initial instructor); additional qualified faculty: Divinus Oppong-Tawiah, Kayla (Guangrui Li). Other part-time faculty: Moshe Mikanovsky, Hossam Ali-Hossain

18. Physical Resources

Regular Schulich classroom with standard AV and internet connectivity.

19. Bibliography and Library Statement

Schulich
School of Business
York University

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

20. Instructors and Faculty Coordinator

Initial instructor:
Henry M Kim

Alternative instructors:
See #17

Course coordinator:
Henry M Kim

21. Specializations

Primary area or specialization:
OMIS

Secondary areas or specializations:
Not applicable

22. Student Contact and Enrolment

Contact hours:
18 contact hours

Maximum enrolment:
45 Students

Expected enrolment:
25-45 students

Evidence for enrolment expectations:
Based on expected enrolment for the Tech MBA program

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

a. Reflection of Equity, Diversity, Inclusion, Decolonization, and Indigenization in Course Content and Delivery

The Modern IT Architecture syllabus embeds EDI-DI principles directly into its intellectual core. Technical modules are paired with readings and case studies led by Indigenous, Black, and other historically marginalized voices—for example, critiques of cloud-computing sovereignty by Indigenous data-governance scholars and analyses of Black-owned fintech platforms that challenge exclusionary funding pipelines.

Delivery methods reinforce the same commitments. "Architectures of exclusion" vignettes prompt students to identify how legacy systems marginalize specific groups. Multiple assessment formats—mind-maps, three-minute podcasts, concise reflective briefs, and technical blueprints—honour diverse epistemologies and abilities, while captioned videos, flexible pacing, and anonymous name-pronunciation tools promote accessibility and belonging.

b. Contribution to Students' Learning on Equity, Diversity, Inclusion, and Decolonization

Students emerge from Modern IT Architecture with a critical lens that links technical decisions to social justice imperatives. In discussing topics such as tribal data-sovereignty cloud deployments and Black-owned fintech platforms, we discuss how power, history, and infrastructure intersect, sharpening their ability to spot bias and exclusion in legacy systems.

Applied activities then translate awareness into practice. Project rubrics reward inclusive design features like multilingual interfaces and low-bandwidth resilience. Reflective briefs ask students to trace whose voices and values are amplified—or silenced—in their solutions, cultivating self-assessment skills that carry into professional life. Collectively, these experiences build competence in equity-minded systems thinking.

24. Human Participants Research

N/A

25. Conditions for Approval

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

a) The Area is deleting courses with at least the same total number of credits.
Part of a curriculum revamp. No net new credits.

b) Provide a convincing case for the proposed course.
This is a course that was strongly recommended by the TechMBA Advisory Committee for a redesigned curriculum

Originator:

	May 16, 2025
Signature	Date
Henry Kim	OMIS
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.

Adam Diamant	OMIS
Markus Biehl	OMIS
David Johnston	OMIS
Julian Yeomans	OMIS
Guangrui (Kayla) Li	OMIS
Divinus Oppong-Tawiah	OMIS

Approvals

Area or Specialization:

Schulich
School of Business
York University

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.

May 17, 2025

Signature | Date

Henry Kim | **OMIS**

Name of Coordinator or Director | Area or Specialization

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

Signature | Date

Name of Program Director | Program

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

Kevin Tasa | November 20, 2025

Signature | Date

Kevin Tasa | Master Programs Committee

Name of Committee Chair | Committee

OMIS 6018 1.50: Modern IT Architecture

Course Outline
TBD

Instructor

Henry Kim
G236 MB
Tel: 416-882-8748
hkim@schulich.yorku.ca
Office hours: TBA

Course Administrator

Jennifer Brethour
S337N SSB
416-736-2100 x44681
jenab@schulich.yorku.ca

Henry M. Kim is an Associate Professor at the Schulich School of Business, York University in Toronto, and is the Director of York University's blockchain.lab. He is also the Co-Principal Investigator for a $525,000 project on Digital Currencies, a research collaboration bringing together academics, Bank of Canada, financial institutions, and startups to investigate blockchain, cryptocurrencies and web3, digital payments, and central bank digital currency (CBDC). Prof. Kim holds degrees in Industrial Engineering from University of Toronto (BASc and PhD) and University of Michigan at Ann Arbor (ME).

Brief Description
This course equips future technology-savvy managers with the vocabulary and mental models needed to evaluate and design contemporary IT architectures. Students learn how hardware economics (Moore's Law), cloud and serverless software, internet-telecommunications infrastructure, and cyber-risk management interact to shape strategic decisions and customer value. Through lectures, discussions, and hands-on assignments, participants develop an integrated architectural blueprint aligned with organizational growth objectives.

Prerequisites/Corequisites/Course Exclusions: This course is available to all Tech MBA and regular MBA students.

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Course Learning Outcomes

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

- Link hardware economics to strategic planning – Explain how ongoing cost-performance gains in computing influence investment timing, product design, and competitive positioning.
- Translate modern software practices into business value – Describe how contemporary development and deployment models improve organizational agility, speed of innovation, and cost efficiency.
- Recommend deployment models that maximize return – Justify the selection of on-premise, cloud, or serverless solutions by balancing scalability, resilience, risk, and total cost of ownership.
- Align network capabilities with customer and regulatory requirements – Analyze how Internet and telecommunications decisions affect service quality, data governance, and compliance obligations.
- Integrate cyber-risk management into technology strategy – Evaluate how proactive safeguards and compliance obligations protect revenue, brand reputation, and stakeholder confidence.
- Present an integrated architectural blueprint – Develop and defend a cohesive technology architecture that supports a firm's strategic goals and long-term growth trajectory.

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

Assignment/Task	% Weight	Author
Class Participation	15%	Individual
Vibe Coding Assignment	30%	Individual
In-Class Quiz	15%	Individual
IT Architecting Project	40%	Group

Grading Scheme

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

Course Material

Required reading for this course includes the following book, which is available for purchase from the publisher website https://students.flatworldknowledge.com/course/2608908:
Information Systems, Version 10.0 by John Gallaugher
Published: May 2024
ISBN: 978-1-4533-4121-6.
The publisher website allows you to input your instructor's name and/or course code, and will take you directly to the book.

Course website
We will be using Schulich Canvas for the course - https://schulich.instructure.com. We will also be using Turnitin through Canvas. So, make sure that you have both Canvas and Turnitin accounts set up.
Canvas has been created to contain general information for Schulich students and information and materials specific to this course. Check it frequently.

Copyright
Course materials, such as lectures, PowerPoint slides, tests, course notes, outlines, and similar materials, are protected by copyright. As creator of those materials the instructor(s) is the exclusive copyright owner. You may take notes and make copies of course materials for your personal use. However, you may not reproduce or distribute the course materials (e.g. uploading that content to a commercial website) without my express written permission.
Third party copyrighted materials (such as book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law. Copying this content for distribution may lead to a violation of Copyright law.

Class-by-Class Syllabus

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

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

Class 1 – Moore's Law

Readings

- Book, Chapter 6
- Echo360 postings

Learning objectives

- Explain how the exponential improvement in chip performance and cost (Moore's Law) influences competitive strategy and industry transformation.
- Analyze how emerging technologies such as AI, custom chip design, and cloud computing continue to deliver performance gains even as Moore's Law slows.
- Interpret how technological performance trends in processing, storage, and telecom translate into operational efficiencies and new market opportunities.
- Describe how distributed computing models like cloud, grid, and supercomputing support scalable business solutions and innovation.
- Evaluate the environmental and ethical implications of rapid technology turnover, particularly the challenges of managing electronic waste.
- Illustrate how firms like Disney use embedded, wearable, and IoT technologies to enhance customer experiences and streamline operations.
- Identify and assess the business implications of the current and next waves of computing, including pervasive AI and smart devices.

Class 2 – Software Primer

Readings

- Book, Chapter 15
- Echo360 postings
- The Ultimate Guide to Vibe Coding (https://corpwaters.substack.com/p/the-ultimate-guide-to-vibe-coding)
- Vibe coding complete tutorial and tips (https://www.youtube.com/watch?v=v7UcVPO4y3c)

Learning Objectives

- Learn what vibe coding is and how to do elementary vibe coding
- Recognize how software enables strategic capabilities across industries and why understanding software fundamentals is essential for effective management.
- Differentiate between system software, application software, and embedded systems, and explain their roles in modern digital products and services.
- Understand how enterprise systems like ERP, CRM, and SCM integrate organizational processes and the implications for business operations and data management.
- Analyze how distributed computing, web services, and APIs support modular, scalable platforms that enable collaboration and innovation.
- Evaluate how software is written, including the role of programming languages, LLMs, and low-code/no-code tools, and assess associated risks and opportunities.
- Compare agile and waterfall methodologies, with an emphasis on scrum as a dominant model in contemporary software development practice.

- Examine the full cost of owning and managing software systems, common causes of project failure, and how software complexity can impact product rollouts like in VW's EV case.

Class 3 – Modern Software Infrastructure
Readings
- Book, Chapter 16
- Echo360 Postings

Learning Objectives
- Recognize how open source, cloud, and virtualization technologies are transforming the software industry and reshaping how firms create, deliver, and manage digital services.
- Understand the strategic rationale behind adopting open source software, its benefits and risks, and how firms monetize or contribute to the open source ecosystem.
- Evaluate how cloud computing—particularly SaaS, PaaS, and IaaS—lowers costs, increases agility, and alters both vendor economics and enterprise IT strategy.
- Explain the operational and economic implications of cloud deployment models (public, private, hybrid) and concepts like cloudbursting and black swan events.
- Assess how virtualization, containers, and app-based platforms support scalability, reduce overhead, and impact how firms build and maintain IT infrastructure.
- Identify the risks of SaaS and cloud dependency, including vendor lock-in, legal exposure, and data security, and how managers can mitigate them.
- Make informed software sourcing decisions by analyzing trade-offs in building, buying, or renting software in light of strategic, operational, and compliance considerations.

Class 4 – Internet and Telecommunications Infrastructure
Readings
- Book, Chapter 20
- Echo360 Postings

Due
- In-Class Quiz

Learning Objectives
- Understand how core internet technologies—URLs, domains, IP addresses, DNS, and protocols—work together to locate and deliver online content reliably and securely.
- Interpret how TCP/IP, UDP, routers, and packet switching enable data transmission across the global Internet, and analyze their role in systems like VoIP and high-speed finance.
- Evaluate various last-mile technologies (DSL, cable, fiber, wireless, satellite), their performance trade-offs, and how they affect accessibility, cost, and innovation in broadband delivery.
- Analyze how mobile technologies, including 5G, differ in capabilities and infrastructure requirements, and consider their potential to support emerging applications like AR, autonomous vehicles, and smart cities.
- Understand the concept of net neutrality and critically assess its implications for ISPs, content providers, consumers, and innovation in the digital economy.
- Examine how LEO satellite systems like SpaceX Starlink are reshaping global connectivity, and weigh their technical, commercial, and geopolitical implications.
- Reflect on the societal and strategic risks posed by infrastructure concentration, such as the reliance on single providers like Starlink, and explore emerging governance, competition, and policy concerns.

Class 5 – IT Security Infrastructure
Readings

- Book, Chapter 21
- Echo360 Postings

Learning Objectives

- Recognize the accelerating pace and cost of security breaches and explain why treating cybersecurity as a board-level priority is non-negotiable for modern firms
- Identify today's most common attackers—from ransomware crews and data harvesters to nation-state espionage teams—and illustrate their motives with timely examples
- Describe how social engineering, phishing, malware, and zero-day exploits compromise confidentiality, integrity, and availability across the stack
- Evaluate user-level vulnerabilities such as weak passwords, deep-fake voice scams, and IoT "spy in your kitchen" devices, and outline pragmatic counter-measures
- Analyze how technical safeguards—encryption, MFA, network segmentation, AI-driven threat detection—shrink the attack surface and erode an adversary's ROI
- Design a layered defense strategy that blends people, process, and technology controls (frameworks, audits, red/blue teaming) to meet both compliance and resilience goals
- Model a culture of constant vigilance by championing security training, incident-response planning, and post-mortem learning so breaches become teachable moments rather than existential threats

Class 6 – Final Project Presentations

Readings

- Echo360 Postings

Due:

- Final Presentation & Write-up

Learning Objectives

- Analyze and document the components of an organization's IT architecture, including hardware, software, networks, data, and cloud infrastructure.
- Evaluate how different elements of the IT stack support business processes, enable strategic goals, and align with organizational priorities.
- Identify opportunities for improvement or innovation in the current architecture, considering factors such as scalability, security, interoperability, and cost-efficiency.
- Develop and communicate a clear, coherent IT architecture map and justification that reflects both technical understanding and managerial insight.

Assignments

Class Participation | Value 15% (Individual)

- You may post comments or questions on next week's slides on Echo360.
- You may submit at most two postings each week and each posting must be less than 60 words. You must also indicate the word count, which excludes things like your section and references and URLs. If you don't follow these directions, you may not receive credit for your comments or questions.
- If you have references, put the URLs. They don't count towards the 60. It is fine if you are using ChatGPT but you must provide the shared link URL as a reference.
- As long as your postings are made before 6AM Xday <u>and</u> you attend that week's lecture <u>and</u> your postings have merit, you will receive credit for your postings towards your class participation mark.

- If a posting is truly trivial or parrots exactly what someone else just said, then I consider that posting to be without merit.
- I will integrate some but not necessarily all of your postings into the lectures.
- Your class participation mark reflects your Echo360 posting and as well as your public comments during the lecture
- The instructor will valuate the merits of your Echo360 postings and in-class comments on a weekly basis so that rationale for your class participation mark has an objective basis.

Vibe Coding Assignment | Value 30% (Individual)

For the Vibe Coding Assignment, you'll build a small, manager-friendly app that makes one concept from the course jump off the page—think a Moore's-Law cost curve visualizer, a cloud-versus-on-prem break-even calculator, or a supply-chain tracker mock-up. Working solo, lean on GenAI tools (ChatGPT, Copilot, Gemini, etc.) to generate the heavy-lift code while you focus on the business logic, interface "vibe," and clear, jargon-free user flows. Keep the codebase lightweight (roughly a few hundred lines or fewer), document any AI prompts you used.

Submit three items by the start of Class 5: (1) a zipped project folder or shareable link that runs out-of-the-box; (2) a two-page executive brief that explains the problem your app tackles, the architectural choices you made, and the strategic insight it delivers; and (3) a 300-word reflection on what GenAI got right, what it got wrong, and how you steered it. Grading weights: concept relevance & insight (30 %), functionality & UX (30 %), technical soundness & clarity of code (20 %), and AI-use reflection (20 %).

In-Class Quiz | Value 15% (Individual)

Final Project | Value 40% (Group)

IT Architecture Blueprint for a Sponsoring Company

- Gather background information: pull together annual reports, company websites, tech blogs, and any documents you can access so you have solid facts about the organization's people, systems, and goals.
- Map where data lives and flows: note the main types of information the company keeps, where it's stored, how it travels between teams, and any rules they follow to keep it clean and private.
- List the computers and cloud services in use: describe the key servers, laptops, data centers, and any cloud providers the organization relies on, including how well these resources handle busy periods or unexpected outages.
- Identify the core software and how it connects: outline the business apps, websites, and tools employees use every day, and explain how these systems share information with each other.
- Review security and compliance habits: summarize how the organization protects its data (passwords, encryption, monitoring) and meets any legal or industry requirements.
- Tie technology to business priorities: talk with stakeholders or use published sources, to show how the current setup supports growth, saves money, or improves customer experience.
- Write a clear, engaging report: combine your findings into a 12-15 page document with diagrams, tables, and explanations, ending with a list of practical improvements and recommendations the company could tackle next.
- Give a 15 minute presentation in the last week of class. Everyone in your group must present.

Student Preparation for Class and Class Participation: Expectations

Preparation
Be prepared to review the in-class material, and post on Echo360 each week. Each week's material will be built on the previous week's, so it is important that you have reviewed and understand the previous course material. Seek help when needed. Class slides will be posted on Canvas one week prior to each class.

Class Participation
All students are strongly encouraged to actively participate in class discussions, ask questions, provide relevant and current examples, or challenge the perspectives of your peers and the instructor. This is an opportunity for you to develop your communication, critical analysis, and presentation skills.

Late Assignments
Deadlines in this course follow Schulich's academic regulations. Any assignment submitted after the stated due time receives a grade of zero unless you have arranged an extension before the deadline on one of the grounds recognized by the School (documented illness, compassionate or religious accommodation, or a formal accessibility plan). Extensions are granted only in truly exceptional cases and must be supported by the appropriate documentation. If you anticipate a conflict, reach out to me as early as possible—requests made after the deadline cannot be considered.

Coursework
Coursework should be submitted through Canvas.

Weekly Lectures:
The instructor will post lecture slides and videos to Canvas for each of the 6 weeks of the course. These slides and videos will vary in length depending on the material. It is your responsibility to watch each of the videos.

Use of Mobile Devices, Laptops, etc. during class
Learning research shows that unexpected noises and movement divert and capture people's attention, which means you are affecting everyone's learning experience if your cell phone, laptop, etc. makes noise or is visually distracting during class. For this reason, I ask you to mute your devices during class.

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

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.70 and 6.10.

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

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

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

MEMORANDUM

York University Libraries

To: Henry M. Kim, Area Coordinator and Associate Professor, OMIS, Schulich School of Business

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

Date: May 30, 2025

Subject: Library Statement – OMIS 6018: Modern IT Architecture

Summary

York University Libraries (YUL) is well positioned to support the proposed course which will equip future technology-savvy managers with the vocabulary and mental models needed to evaluate and design contemporary IT architectures. Students learn how hardware economics (Moore's Law), cloud and serverless software, internet-telecommunications infrastructure, and cyber-risk management interact to shape strategic decisions and customer value. Through lectures, discussions, and hands-on assignments, participants develop an integrated architectural blueprint aligned with organizational growth objectives. Faculty and students can make use of an array of library resources and services to meet their research and learning needs. This statement highlights offerings related to the major themes of the course. It also brings attention to collections of interest from connected fields such as computer science and information technology.

Collections

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

- Information resources management, Management information systems, Information technology – Management, Business enterprises – Computer networks, Computer systems -- Design, Computer architecture, Cloud computing, Computer security – Management, Cybersecurity, Risk management, Strategic planning, and Artificial intelligence etc.

The Libraries have recently acquired **Sage Business Cases**, and instructors are encouraged to explore relevant cases that are freely accessible to students. It is recommended that the instructor use the Copyright

Office's Course Reading List/Syllabus Review Service to ensure that the terms of use for the various materials allow for the content to be used in a course. Their staff can also assist in creating permanent links to library content, which can be embedded in Canvas for easy student access.

The Omni single-search interface provides students with access to a wide range of materials, including books, book chapters, articles, dissertations, streaming media, etc. Library users may also request items from partner libraries through Omni. Based on the librarian's review of class themes and weekly topics, a tailored selection of electronic databases of interest for this course are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings.

Business & Technology Publication Databases:

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

Newspaper/ Magazine Databases:

- Factiva
- Nexis Uni
- Press Reader

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.

Research Guides of Interest:

- Step-by-Step Business Research Tutorials

- Information Technology Guide
- Computer Science Guide
- Using Generative AI to Do Research
- Business Citation Guide

Research Help

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

Accessibility Services

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

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 Tech MBA Program

2. Responsible Unit:
OMIS

3. Subject Code (Rubric) and Course Number:
OMIS 6621

4. Credit Value:
1.50

5. Long Course Title:
Design Thinking for Innovation

6. Short Course Title:
Design Thinking for Innovation

7. Effective Term/Calendar Year:
Fall 2026

8. Language of Instruction:
English

9. Calendar (Short) Course Description:

This course will train managers who participate in solving hard business problems (such as IT transformations, restructuring, new product innovation etc) how to modify their perspective on problem solving, and apply contemporary methods to solve ambiguous and complex problems, and innovate. Using Design Thinking, a leading process adopted from

the design world, managers who aspire to lead innovation in their organizations will learn, through a hands on, step-by-step process, how to engage with their peers and users (internal and/or external), accurately contextualize the problem, swiftly brainstorm the uncover new ideas, prototype and test technical solutions until they achieve real-world validation for the most effective direction to pursue.

Course credit exclusion:
SB/OMIS 6620 (3.0)

10. Expanded Course Description:

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

This course will train managers who participate in solving hard business problems (such as IT transformations, restructuring, new product innovation etc) how to modify their perspective on problem solving, and apply contemporary methods to solve ambiguous and complex problems and innovate. Using Design Thinking, a leading process adopted from the design world, managers who aspire to lead innovation in their organizations will learn step-by-step and hands-on how to work with their clients and users (internal and/or external), frame the problem in the correct context, rapidly ideate to generate new ideas, prototype and test technical ideas until they get real world validation for the right direction to go.

Throughout the course, the instructor and students will work together on a selected problem. We will apply Design Thinking methods and shift our perspectives to find true innovation. To strengthen their learning, students will be working in groups on a second project throughout the class. Assignments throughout the course will be used for individual contribution of each student to the project, while a final group presentation will present the project end-to-end, focusing on the learnings the students acquired during the course.

Method of Instruction

This course is designed around a variety of pedagogical tools—interactive lectures, an in-class hands-on project led by the instructor to demonstrate design thinking from beginning to end, facilitated discussions, guest speakers, individual assignments, and a group

"outcomes" project. Focused on learning by experiencing, the interactive lectures and facilitated discussions will assist in clarifying concepts and ideas, while the hands-on, in-class activities will enforce the experimental nature of Design Thinking.

Student Preparation
Expect to spend at least 5-6 hours per week preparing for this class and completing assignments. Learning in this course involves reading assigned materials (book's chapters, articles) to prepare for the concepts learned in the following class, and actively working on a project throughout the semester, each week with activities related to the learned lesson. Project assignments are due in groups, while there will be 4 individual assignments as well along with the group assignments.

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

Group Work

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

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

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

Group sizes will depend on the number of students enrolled.

11. Course Learning Outcomes:

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

- What is meant by design thinking, why it is important and how it compares with other management innovation frameworks
- Where and how to apply design thinking, with tools and a process to apply for design thinking

- What it means to be user centric and how to build empathy towards users
- How to define the context of the problem that is being solved
- How to ideate, come up, prioritize and validate new ideas
- How to prototype and test ideas by iterating on the process to learn and innovate incrementally
- How to effectively present results and outcomes associated with design thinking

12. Rationale:

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

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

1. 4 individual assignments related to the project milestones, to be completed by all students individually
2. 4 milestone group submission of assets, to encourage the groups to work on their project throughout the course
3. Quiz, focused on understanding the "why" behind the process and activities of design thinking
4. Group project outcome presentation – class presentation and paper of the groups' project conclusion (process, learning, outcomes, challenges and solutions, next steps)

Deliverable	Weight	Format
4 project milestone assignments done individually by each project team member (7% each)	28%	Individual
4 project milestone submitted in a group (3% each)	12%	Group
Quiz	25%	Individual
Project "Outcome" final:		
a. Class Presentation (~10 slides)	15%	Group

Deliverable	Weight	Format
4 project milestone assignments done individually by each project team member (7% each)	28%	Individual
4 project milestone submitted in a group (3% each)	12%	Group
Quiz	25%	Individual
Project "Outcome" final:		
b. Written report (~ 3000 words)	15%	Group
c. Peer reviews	5%	Individual
	100%	

14. Integrated Courses:

N/A

15. Cross-listed Courses:

N/A

16. Enrolment Notes:

This course will be offered to the students enrolled in Tech MBA Program

17. Faculty Resources:

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

18. Physical Resources:

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

19. Bibliography and Library Statement:

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

Suggested book:

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

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

Additional references:

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

GE Healthcare: Changing Experiences through Empathy – The Adventure Series
OralB: How Two Industrial Design Titans Are Helping Brands Simplify Tech
Netflix: How Netflix Used Design Thinking to Reinvent Itself, Over and Over
Airbnb: Airbnb, a Design Thinking success story
UberEats: How We Design on the UberEATS Team
IBM: How IBM is Training Its Workforce to Think Like Designers
ABN AMRO: Design thinking gives you an edge over your competitors
Stanford Medicine: Design thinking as a way to improve patient experience
Voice of San Diego, and OrbitaLAB: Journalism case studies that apply design thinking
Golden Gate Regional Center (Non-for-profit) : Better Service, Faster: A Design Thinking Case Study
Municipality of Holstebro, Denmark > The Good Kitchen: How an Improved Food Service Creates a Better Life Quality for Elderly People

Schulich
School of Business
York University

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

20. Instructors and Faculty Coordinator

Initial instructor:
Moshe Mikanovsky

Alternative instructors:
Henry Kim
Divinus Oppong-Tawiah
Kayla Li

Course coordinator:
Henry Kim

21. Specializations

Primary area or specialization:
Tech MBA

Secondary areas or specializations:
TBD

22. Student Contact and Enrolment

Contact hours:

6 sessions, 3hrs each

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

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

Evidence for enrolment expectations:

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

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

a. Reflection of Equity, Diversity, Inclusion, Decolonization, and Indigenization in Course Content and Delivery

From Week 1 onward, students practise empathy-first research—interviews, journey maps and persona work—explicitly designed to surface the lived experience of users who are often excluded from mainstream product design . Team-formation rules prohibit disciplinary or cultural dominance and require each member to adopt a novice stance, ensuring that no single "expert" perspective silences others . A diversified assessment suite—design briefs, napkin pitches, prototypes and peer reviews—offers multiple modes of expression and accommodates varied learning styles. Captioned materials, advance slide release, and flexible milestone pacing further support accessibility.

b. Contribution to Students' Learning on Equity, Diversity, Inclusion, and Decolonization

By repeatedly linking design choices to questions of voice, power and access, students acquire a critical sensibility: whose problem is being solved and who benefits? Rubrics reward inclusive features (e.g., low-bandwidth resilience, multilingual interfaces), while reflective checkpoints ask students to identify any stakeholders rendered invisible in their solutions. Graduates thus leave with both a design toolkit and a habit of equity-minded inquiry that they will carry into professional practice.

24. Human Participants Research

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

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

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20. Conditions for Approval

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

a) The Area is deleting courses with at least the same total number of credits.
Part of a curriculum revamp. No net new credits.

b) Provide a convincing case for the proposed course.
This is a course that was strongly recommended by the Tech MBA Advisory Committee for a redesigned curriculum

Originator:

	May 16, 2025
Signature	Date
Henry Kim	OMIS
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.

Adam Diamant	OMIS
Julian Yeomans	OMIS
Markus Biehl	OMIS
David Johnston	OMIS
Divinus Oppong-Tawiah	OMIS
Vibhuti Dhingra	OMIS

Approvals

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York University

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.

May 26, 2025

Signature | Date

Henry Kim | **OMIS**

Name of Coordinator or Director | Area or Specialization

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

Signature | Date

Name of Program Director | Program

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

Kevin Tasa | November 20, 2025

Signature | Date

Kevin Tasa | Master Programs Committee

Name of Committee Chair | Committee

OMIS 6621: Design Thinking for Innovation (6 weeks)

Course Outline
TBD

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

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

Moshe Mikanovsky is a veteran software engineer and product management leader. During his career he developed and managed many B2B/B2B2C software products in multiple industries - Product Lifecycle Management for Manufacturing Engineering, Work Management for Project Management systems, Debit Cards solutions for FinTech startup, tools for Loyalty Programs solutions, Virtual Data Rooms for Mergers & Acquisitions, AI/NLP based Legal search, back-office and contractors/clients portals for staffing agencies, Climate Change based models for financial risk and more. The first 20 years he spent in engineering, and then the past 14 years in Product Management. Moshe founded Products for Good and is the Product Director at Rootquotient, Through both organizations, he consults and advises startup and growth companies, as well as founders, entrepreneurs and product people, on how to build the right products. He co-hosts the Product for Product Podcast, and hosts the Beyond Product podcast. He is the founder and lead mentor of Products for Good, where aspiring product managers gain real world experience in building products for good social causes. He is an OMIS instructor at Schulich School of Business at York University, specifically Information Systems, and a Design Thinking course which he designed. He holds a Master of Science in Information Systems from Lawrence Technological University in Southfield, Michigan. In his free time, Moshe loves reading and writing. His first fictional book "The Resurrector" was published in January 2022.

Brief Description

Short / Calendar (Short) Course Description:

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

Long / Expanded Course Description:

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

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

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

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Course Learning Outcomes

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

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

Deliverables at a Glance

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

Deliverable	**Weight**	**Format**
4 project milestone assignments done individually by each project team member (7% each)	28%	Individual
4 project milestone submitted in a group (3% each)	12%	Group
Quiz	25%	Individual
Project "Outcome" final:		
a. Class Presentation (~10 slides)	15%	Group
b. Written report (~ 3000 words)	15%	Group
c. Peer reviews	5%	Individual
	100%	

Course Material

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

Suggested Resources

Books:

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

Additional reading:

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

GE Healthcare: Changing Experiences through Empathy – The Adventure Series
OralB: How Two Industrial Design Titans Are Helping Brands Simplify Tech
Netflix: How Netflix Used Design Thinking to Reinvent Itself, Over and Over
Airbnb: Airbnb, a Design Thinking success story
UberEats: How We Design on the UberEATS Team
IBM: How IBM is Training Its Workforce to Think Like Designers
ABN AMRO: Design thinking gives you an edge over your competitors
Stanford Medicine: Design thinking as a way to improve patient experience
Voice of San Diego, and OrbitaLAB: Journalism case studies that apply design thinking
Golden Gate Regional Center (Non-for-profit) : Better Service, Faster: A Design Thinking Case Study
Municipality of Holstebro, Denmark > The Good Kitchen: How an Improved Food Service Creates a Better Life Quality for Elderly People

Student Preparation for Class and Class Participation: Expectations

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

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

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

Some artifacts will be submitted individually, to encourage individual work on many of the important milestones of the projects. These will align with the overall project process for the teams.

Late Assignments:
Deadlines in this course follow Schulich's academic regulations. Any assignment submitted after the stated due time receives a grade of zero unless you have arranged an extension before the deadline on one of the grounds recognized by the School (documented illness, compassionate or religious accommodation, or a formal accessibility plan). Extensions are granted only in truly exceptional cases and must be supported by the appropriate documentation. If you anticipate a conflict, reach out to me as early as possible—requests made after the deadline cannot be considered.

Class-by-Class Syllabus

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

Wk	Subject	Class Outcome	Assignment	Ref
1	Introduction to Design Thinking: What is Design Thinking? And why is it used in business? Design Brief Visualization methods	Understand what Design Thinking is, how it differs from other frameworks, where it can be used and why it is used Define the design brief and learn different methods of visualization that will support all following activities in the class	**Individual assignment 7%** - Design brief for a project idea Due week 2	Section I (Chapters 1-2) Section II intro, Chapter 3
2	What is? Journey Mapping, Value Chain Analysis, and Mind Mapping	Learn how to map the user's journey, and how to build an empathy to the users Define the problems that are worth solving by understanding the context: looking at the value chain and mind mapping the	Group project milestone artifacts - What is? Teams are formed and a project is selected from the team members' project ideas **Group submission 3%** - Design Brief	Chapter 4-6

		entire domain of the problem	- An interview guide - Persona matrix with 4 personas - Journey Mapping of the 4 personas - Value chain analysis - Mind mapping and master list of criteria (submit photos of the process) **Team members individual assignment 7%** - Interview takeaway of 1 target users (1 per team member) - Poster of user research (submit photos) Due week 3	
3	Design Criteria What if? Ideate: Brainstorming What if? Ideate: Concept development Napkin Pitch	Identify design criteria to help with choosing alternatives, and generate ideas. Continue ideating by building concepts, and build quick pitches for each alternative to be able to compare them.	Group project milestone artifacts - What if? **Group submission 3%** - Design Criteria - Brainstorming Planning (including a list of at least 10 ideas) - Photos of your brainstorming session - Photos of your Concept Development session - **Team members individual assignment 7%** - Napkin Pitch for 1 concept. Each member must submit a different concept	Section III (Chapters 7-8)

			Due Week 4	
4	What wows? Assumption Testing What wows? Rapid Prototyping Quiz	Prioritize which idea has the best chance Learn different methods of prototyping, to test ideas in the least expensive ways	Quiz: Focus is on understanding the why behind the process. Value: 25% Group project milestone artifacts - What wows? **Team members individual assignment 7%** - Key Assumptions for 1 concept. Each member must submit for a different concept **Group submission 3%** - Selection of 1 top concept with reasons it was chosen - Prototype document of 1 top concept Due Week 5	Section IV (Chapters 9-10)
5	Learning Guide What works? Customer Co-Creation and Learning Launch	Define the constraints of the learning phase (resources, budget, investment, risk), and craft the selected solution with a customer. Note: Students might not have the customer on-hand in the class to do it. Learn about different methods to launch our solution, and ways to collect feedback, so we can learn from it	Group project milestone artifacts -What works?. - Learning guide document for 1 concept - Photos of a co-creation session with at least 2 different customers - Learning Launch Plan for 1 experiment - 2nd prototype document, based on learning from co-creation sessions, and ready	Section V (Chapters 11-12) Section VI

			for Learning Launch experiment Value 3% Due Week 6	
6	Final project presentations	Students present the project they worked on, identifying challenges, key learning and outcomes	Group: Class Presentation 15% Written report 15% Individual: Peer reviews 5%	

Notes:

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

Written Assignments/Projects: Descriptions

Individual assignments:

Individual Assignment 1: Design brief for a project idea

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

In this assignment, individuals will submit their proposal for a project. Submitted project ideas will be used in the duration of the course for the team projects (for each team, selected either by team members, or by the instructor). Criteria:

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

Individual Assignment 2: **Interview takeaway and user research poster**

- Due: Class of Week 3
- Value: 7%

Part of the What is? stage, each student will have to conduct an interview with at least one potential user that has the problem their team is working on solving. The cumulative interviews from all team members will be used by the team for their learning and project progress. The deliverables will follow these requirements:

- Interview takeaway of 1 target users (1 per team member)
- Poster of user research (submit photos)

Individual Assignment 3: **Napkin Pitch for 1 concept**

- Due: Class of Week 4
- Value: 7%

Part of the What if? stage, each student will have to create a Napkin Pitch for one of the concepts that the team came up with. The deliverables will follow these requirements:

- Napkin Pitch for 1 concept. Each member must submit a different concept

Individual Assignment 4: **Key assumptions for 1 concept**

- Due: Class of Week 5
- Value: 7%

Part of the What wows? stage, each student will have to define the key assumptions for one of the concepts that the team came up with. This can be the concept they submitted a Napkin Pitch in the previous assignment, or another concept. The deliverables will follow these requirements:

- Key Assumptions for 1 concept. Each member must submit for a different concept

Quiz

- Class of Week 4
- Value: 25%

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

Group assignments:

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

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

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

Group sizes will depend on the number of students enrolled.

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

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

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

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

- Design Brief

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

- An interview guide
- Persona matrix with 4 personas
- Journey Mapping of the 4 personas
- Value chain analysis
- Mind mapping and master list of criteria (submit photos of the process)

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

- Due: Class of Week 4
- Value: 3%

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

- Design Criteria
- Brainstorming Planning (including a list of at least 10 ideas)
- Photos of your brainstorming session
- Photos of your Concept Development session

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

- Due: Class of Week 5
- Value: 3%

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

- Selection of 1 top concept with reasons it was chosen
- Prototype document of 1 top concept

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

- Due: Class of Week 6
- Value: 3%

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

- Learning guide document
- Learning guide document for 1 concept
- Photos of a co-creation session with at least 2 different customers
- Learning Launch Plan for 1 experiment
- 2nd prototype document, based on learning from co-creation sessions, and ready for Learning Launch experiment

Group Final Project: **Project Outcomes Report and Presentation**

- Due: Class of Week 6
- Max length**:** Written paper 3000 words. Presentation 10 slide
- Value: 35% **Point Allocation**: *Written Paper: 15%, Presentation: 15%, Peer Review: 5%*

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

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

Evaluation of Written Assignments/Projects and Exams

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

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

General Academic Policies: Grading, Academic Honesty, Accommodations

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

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

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

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

Grading Scheme

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

MEMORANDUM

York University Libraries

To: Henry M. Kim, Area Coordinator and Associate Professor, OMIS, Schulich School of Business

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

Date: May 30, 2025

Subject: Library Statement – OMIS 6621: Design Thinking for Innovation

Summary

York University Libraries (YUL) is well positioned to support the proposed course which will train students participating in solving hard business problems (such as IT transformations, restructuring, new product innovation etc) how to shift their approach to problem-solving, applying modern methods to tackle ambiguous and complex challenges, and foster innovation. Utilizing Design Thinking, a prominent methodology derived from the design industry, students aiming to spearhead innovation within their environments will learn, through a hands-on, step-by-step process, how to engage with their peers and users (internal and/or external), accurately contextualize the problem, swiftly brainstorm to uncover new ideas, prototype, and test technical solutions until they achieve real-world validation for the most effective direction to pursue. Faculty and students can make use of an array of library resources and services to meet their research and learning needs. This statement highlights offerings related to the major themes of the course. It also brings attention to collections of interest from connected fields such as computer science and information technology.

Collections

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

- Product design, Design thinking, Problem solving, Creative abilities in business, Technological innovations -- Management, User-centered design, Consumer behavior, Consumer research, Prototyping, Usability testing, and Product management etc.

The suggested textbook listed in this course proposal and outline is freely available as an eBook via the Libraries. The Libraries have recently acquired **Sage Business Cases**, and instructors are encouraged to explore relevant cases that are freely accessible to students. It is recommended that the instructor use the Copyright Office's Course Reading List/Syllabus Review Service to ensure that the terms of use for the various materials allow for the content to be used in a course. Their staff can also assist in creating permanent links to library content, which can be embedded in Canvas for easy student access.

The Omni single-search interface provides students with access to a wide range of materials, including books, book chapters, articles, dissertations, streaming media, etc. Library users may also request items from partner libraries through Omni. Based on the librarian's review of class themes and weekly topics, a tailored selection of electronic databases of interest for this course are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings.

Business & Technology Publication Databases:

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

Newspaper/ Magazine Databases:

- Factiva
- Nexis Uni
- Press Reader

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.

Research Guides of Interest:

- Step-by-Step Business Research Tutorials
- Information Technology Guide
- Computer Science Guide
- Business Citation Guide

Research Help

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

Accessibility Services

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

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:
Technology MBA Program

2. Responsible Unit:
OMIS

3. Subject Code (Rubric) and Course Number:
OMIS 6631

4. Credit Value:
1.5

5. Long Course Title:
Storytelling with Data

6. Short Course Title:
Storytelling with Data

7. Effective Term/Calendar Year:
Fall 2026

8. Language of Instruction:
English

9. Calendar (Short) Course Description:

This course is an introduction to the fundamental theories of visual communication, data visualization, and data storytelling.

Students will learn the fundamentals of how to communicate effectively with data through visualization and storytelling. Major areas for discussion include design principles, data visualization models, dashboards, presentation skills, data stories, and technical tutorials using Tableau software.

Students will learn how to bring data to life and present memorable stories that drive action.

Course credit exclusion:
SB/MBAN 5140 (3.0)
SB/OMIS 6630 (3.0)

10. Expanded Course Description:

This course offers an exploration of visual communication principles within the context of data visualization and analytics. The course is designed for Technology MBA students looking to develop a critical understanding of how visual design impacts data-driven decision-making. Beginning with foundational theories, students learn how visual storytelling enhances the communication of insights, making complex information accessible, understandable, and actionable. By using Tableau software, students will also gain hands-on experience in crafting visualizations, dashboards, and stories that are aesthetically pleasing, informative, and memorable – skills essential for today's data professional and future leaders.

Throughout the course, students will engage with a range of topics that intersect both technical and design elements of visual analytics. Key discussions include visual design principles, data visualization models, dashboards, presentation skills, and data stories. Dashboard design and effective storytelling will be emphasized. Weekly tutorials using Tableau will support students in acquiring technical skills, allowing them to create sophisticated dashboards that integrate seamlessly with professional data workflows. This practical component is complemented by discussions on how to tailor visuals to meet specific business needs and audience needs.

Technology MBA students will apply these principles in several projects, fostering a deeper comprehension of data visualization tools and their application to real-world datasets. This approach allows students to translate theoretical knowledge into practical insights, creating visualizations that serve as effective decision-making tools for organizations. A group project and individual assignment will challenge students to analyze data, design

engaging visual stories, and effectively present findings. Each project emphasizes not only technical mastery but also the clarity of the narrative, teaching students to construct visual stories that resonate with stakeholders and convey critical insights efficiently.

By the end of the course, students will be well-versed in the foundations of data visualization, from initial data exploration to presentation and storytelling. They will have developed a toolkit of visual techniques, an understanding of design principles, and the ability to use Tableau to communicate data-driven insights compellingly. This comprehensive learning experience prepares students to make data-informed recommendations in professional contexts, equipping them with skills that are highly valued across all industries where data visualization and analytics play a crucial role in strategic decision-making.

11. Course Learning Outcomes:

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

- Understand the principles of design, visualization, and graphical perception.
- Articulate the audience and purpose for a visualization.
- Learn to focus on insights and ignore the clutter that confuses information.
- Select the correct visualization technique to share insights and answer business questions.
- Act as a data storyteller to get your audience the insights they need in a meaningful way.
- Design and create visualizations, dashboards, and stories using Tableau.

12. Rationale:

This new elective is based on MBAN 5140 Visual Analytics and Modelling. However, this will be a 6-week version only offered to Technology MBA students.

13. Evaluation:

Assignment/Task	Quantity	% Weight	Total %	Author
Group Discussions	3	3%	9%	Group / Individual
Class Participation	1	5%	5%	Individual
Tableau Quizzes	2	23%	46%	Individual
Project	1	40%	40%	Individual
			100%	

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14. Integrated Courses:

Not applicable

15. Cross-listed Courses:

Not applicable

16. Enrolment Notes:

This course is open only to Technology MBA students. This course is closed to all other master's students.

17. Faculty Resources:

David Elsner, Henry Kim, Guangrui Kayla Li, Divinus Oppong-Tawiah, Hila Cohen

18. Physical Resources:

Regular classroom

19. Bibliography and Library Statement:

Attached

Schulich
School of Business
York University

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

20. Instructors and Faculty Coordinator

Initial instructor:

David Elsner

Alternative instructors:
See #17

Course coordinator:

David Elsner

21. Specializations

Primary area or specialization:

OMIS

Secondary areas or specializations:

Not applicable

22. Student Contact and Enrolment

Contact hours:

18 contact hours

Maximum enrolment:

45 Students

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

25-45 students

Evidence for enrolment expectations:
Provide evidence or a rational argument for your enrolment expectations.

Enrolment for MBAN 5140 in the MBA program is typically between 25-45 students.

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

a. Reflection of Equity, Diversity, Inclusion, Decolonization, and Indigenization in Course Content and Delivery

- Content (Assigned Readings, Materials, Case Studies, etc.):
    - The course includes a variety of resources, such as the "Canadian Open Data and Free Geospatial Data Resources" and data sets from the Toronto Open Data Portal. These resources encourage students to consider local contexts and data that reflect Canadian diversity, including insights into different communities within Toronto and across Canada.
    - Assigned readings and exercises emphasize diverse perspectives on data storytelling and data visualization, which supports students in understanding how data can be used to represent varied communities effectively and sensitively. For example, sources like Stephanie Evergreen's "Data Visualization Checklist" emphasize ethical and inclusive representation of data, while resources like "Using Data Visualization to Find Insights in Data" provide insights on avoiding biases in interpretation.
    - By incorporating local data sets and encouraging exploration through open data portals, the course fosters awareness of community-specific issues, potentially encouraging discussions around decolonization and the representation of Indigenous and minority communities within Canadian data.

- Delivery (Inclusivity and Valuation of Diverse Perspectives):
    - The course uses group discussions as part of the curriculum, where students discuss the quality of data visualizations (“Hot or Not”) and provide feedback to each other. This peer engagement fosters inclusivity by ensuring that all voices are heard and respected. The instructor’s decision to refrain from intervening in these discussions allows students to think critically and independently, encouraging the development of diverse viewpoints.
    - Assignments and participation are structured to encourage inclusive engagement. Students are assessed not only on their factual

understanding but also on their ability to incorporate analytical frameworks, current examples, and alternative perspectives into discussions, demonstrating respect for varied viewpoints.

b. Contribution to Students' Learning on Equity, Diversity, Inclusion, and Decolonization

- The course enables students to understand and apply principles of EDII in data visualization by emphasizing ethical data representation. For example, through discussions on visualization best practices, students learn to avoid misleading data presentations, which is crucial in representing marginalized communities accurately and respectfully.
- Projects such as analyzing data from the Toronto Open Data Portal introduce students to real-world applications where EDII principles are critical. This project encourages students to consider the impact of data representation on diverse populations, fostering awareness of how data storytelling can either empower or marginalize certain groups.
- Discussions on understanding context and the limitations of data focuses on who was involved in collecting data, who was not, and how might data collection and reporting itself be perpetuating inequities.
- Weekly discussions and critiques allow students to explore various interpretations and contexts of data, recognizing the importance of representing different communities fairly. This approach cultivates an environment where students appreciate the ethical responsibilities tied to data-driven storytelling, directly contributing to their understanding of inclusivity in analytics.

24. Human Participants Research

N/A

25. Conditions for Approval

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

a) The Area is deleting courses with at least the same total number of credits.
Part of a curriculum revamp. No net new credits.

b) Provide a convincing case for the proposed course.
This is a course that was strongly recommended by the TechMBA Advisory Committee for a redesigned curriculum

Originator:

Schulich
School of Business
York University

	March 4, 2025
Signature	Date
David Elsner	OMIS
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.

Divinus Oppong-Tawiah	OMIS
Adam Diamant	OMIS
David Johnston	OMIS
Julian Yeomans	OMIS
Isik Bicer	OMIS
Moren Levesque	OMIS

Approvals

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

Signature	Date
Name of Coordinator or Director	Area or Specialization

Schulich
School of Business
York University

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

Signature | Date

Name of Program Director | Program

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

Kevin Tasa | November 20, 2025
Signature | Date

Kevin Tasa | Master Programs Committee
Name of Committee Chair | Committee

OMIS 6631 1.50: Storytelling with Data

Course Outline
TBD

Instructor

David Elsner
G234 MB
Tel: 647-998-1587
delsner@schulich.yorku.ca
Office hours: TBA

Admin

Jennifer Brethour
S337N SSB
416-736-2100 x44681
jenab@schulich.yorku.ca

David Elsner is an Adjunct Professor of Operations Management and Information Systems and the Associate Program Director of the Master of Business Analytics program (MBAN) at the Schulich School of Business. He is also the ACP/AICP coordinator for the MBAN and MMAI programs. His areas of expertise are in Business Analytics, Data Visualization, and Project Management. He is also the president of DHE Consulting, providing training, consulting, and analytical solutions to organizations.

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

Brief Description

This course is an introduction to the fundamental theories of visual communication, data visualization, and data storytelling.

Students will learn the fundamentals of how to communicate effectively with data through visualization and storytelling. Major areas for discussion include design principles, data visualization models, dashboards, presentation skills, data stories, and technical tutorials using Tableau. software.

Students will learn how to bring data to life and present memorable stories that drive action.

Prerequisites/Corequisites/Course Exclusions: Available only to Schulich Technology MBA Students

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Student Preparation for Class and Class Participation: Expectations 9
General Academic Policies: Grading, Academic Honesty, Accommodations and Exams 10

Course Learning Outcomes

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

- Understand the principles of design, visualization, and graphical perception.
- Articulate the audience and purpose for a visualization.
- Learn to focus on insights and ignore the clutter that confuses information.
- Select the correct visualization technique to share insights and answer business questions.
- Act as a data storyteller to get your audience the insights they need in a meaningful way.
- Design and create visualizations, dashboards, and stories using Tableau.

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
Group Discussions	3	3%	9%	Group/Individual
Class Participation	1	5%	5%	Individual
Tableau Quizzes	2	23%	46%	Individual
Project	1	40%	40%	Group
			100%	

Grading Scheme

A+	100%	to	89.5%
A	< 89.5%	to	84.5%
A-	< 84.5%	to	79.5%
B+	< 79.5%	to	74.5%
B	< 74.5%	to	69.5%
B-	< 69.5%	to	64.5%
C+	< 64.5%	to	59.5%
C	< 59.5%	to	54.5%
C-	< 54.5%	to	49.5%
F	< 49.5%	to	0%

Course Material

The following is a suggested reading list on the subject:

1. Lankow, Jason, Infographics: The Power of Visual Storytelling. Wiley, August 2013.
2. Wong, Dona M., The Wall Street Journal Guide to Information Graphics: The Do's and Don'ts of Presenting Data Facts and Figures, Reprint Edition. WW Norton, December 2013.
3. Evergreen, Stephanie, Effective Data Visualization: The Right Chart for the Right Data. Sage Publications, May 2019.
4. Knaflic, Cole Nussbaumer, Storytelling with Data: A Data Visualization Guide for Business Professionals. Wiley, November 2015.
5. Dykes, Brent, Lankow, Jason, Effective Data Storytelling: How to Drive Change with Data, Narrative and Visuals. Wiley, December 2019.
6. Duarte, Nancy, Resonate: Present Visual Stories that Transform Audiences. Wiley, September 2010.
7. Balliett, Amy, Killer Visual Strategies: Engage Any Audience, Improve Comprehension, and Get Amazing Results Using Visual Communication. Wiley, June 2020.
8. Strachnyi, Kate, ColorWise: A Data Storyteller's Guide to the Intentional Use of Color. O'Reilly Media, December 2022.

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

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

Class-by-Class Syllabus

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

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

Class 1 – Introduction to Visual Analytics and Modelling

Class:

- Introductions
- History of Visual Analytics
- What is Data Storytelling
- Course Overview
- Course Assignments
- Groups
- Hot or Not Visualizations
- Principles of Good Design
- Introduction to OMIS Store database

eLearning:

- Introduction to Tableau
- Connecting to Data
- Introduction to Tableau Desktop
- Tableau Workflow
- Modifying Your Data

Readings and Videos:

- Canadian Open Data and Free Geospatial Data Resources
- What is Information Design and Why It Matters Now More Than Ever by Kai Tomboc
- Part 1 of the LinkedIn Learning course "Writing a Business Report" [25m]
- What is information Design by Easelly [2m]

Class 2 – The Principles of Visual and Graphical Perception

Class:

- Principles of Visual Perception: Gestalt Theory
- Graphical Perception: Preaatentive attributes
- Clutter is your enemy
- Types of data visualizations
- Data Visualization Catalogue

eLearning:

- Sorting Data
- Filtering Data
- Organizing Data
- Slicing Data by Date
- Using Multiple Measures in a View
- Showing the Relationship Between Numerical Values
- Mapping Data Geographically

Readings and Videos:

- "Using Data Visualization to Find Insights in Data" by Gregor Aisch
- "Find hidden insights in your data: Ask why and why again" by Andy Cotgreave
- Part 2 of the LinkedIn Learning course "Writing a Business Report" [35m]
- 11 Visual Hierarchy Design Principles - Learn How to Improve and Create Beautiful Graphic Designs by Visme

Class 3 – Dashboards

Class:

- Hot or Not Visualizations
- Dashboarding
- Sketching and Wireframing
- Dashboarding best practices
- 4 Types of Effective Dashboards

eLearning:

- Introduction to Dashboards
- Creating a Dashboard
- Creating Interactive Dashboards Using Actions
- Refining a Dashboard
- Telling Stories with Data

Reading and Videos:

- "Strong Titles Are The Biggest Bang for Your Buck" by Stephanie Evergreen
- "Visual Analysis Best Practices" (Tableau Whitepaper)
- City of Toronto Open Data Portal by The City of Toronto [3m]
- "The Visual Design Tricks Behind Great Dashboards" by Andy Cotgreave [56m]

Class 4 – The Context of Data

Class:

- Hot or Not Visualizations
- Analytics-based decision making
- The difference between data and metrics
- Trusting the data
- Reporting vs. Analysis
- The context of data
- Business Performance Analysis

eLearning:

- Using Quick Table Calculations to Analyze Data
- Creating Customized Table Calculations
- Highlighting Values with Reference Lines and Bands
- Making Projections with Trend Lines and Forecasts

Readings and Videos:

- "Putting Data Into Context" by Robert Kosara
- "Junk Charts Trifecta Checkup" by Kaiser Fung
- What Is the Growth Share Matrix? By Boston Consulting Group
- "The Competent Critic" by Alan Smith [21m]
- Why Data Matters: Context Reveals Answers by IBM [2m]

Class 5 – The Psychology and Anatomy of a Data Story

Class:

- Hot or Not Visualizations
- Most Decisions Are Not Based on Logic
- How We React to Facts and Stories
- Data Stories Bridge Logic and Emotion
- What Could Semmelweis Have Done Differently?

- The Six Essential Elements of a Data Story
- Data Stories Come in All Shapes and Sizes
- Every Data Story Needs a Storyteller
- When It Doesn't Make Sense to have a Data Story

eLearning:

- Using Bar-in-Bar Charts and Bullet Graphs to Compare Measures
- Using Sets to Highlight Data
- Using Parameters to Control Data in the View

Readings and Videos:

- Working with Aggregate Functions
- "Story and Data: Three make or break moments in story History" by Alex Chantilas
- "How to Become a Great Storyteller" by MasterClass
- "Data Storytelling: What It Is And Is Not" by Brent Dykes
- "The Power in Effective Data Storytelling" by Malavica Sridhar [15m]
- "Making data mean more through storytelling" by Ben Wellington [14]

Class 6 – Presenting and Sharing Your Story

Class:

- Hot or Not Visualizations
- What is a story?
- The foundation of your data story
- The building blocks of your data stories
- Every data story needs a main insight
- Do you have an actionable insight?
- The analysis process: Exploration to Explanation
- False stories
- Defining a narrative model for data stories
- Building your narrative with story points
- Storyboarding your data story

Readings and Videos:

- "Data Storytelling" by Robert Kosara (Tableau Whitepaper)
- "A different way to think about 'Data Storytelling'" by Chad Skelton
- Elevator Pitch/Personal Branding by Dataquest
- "How Do I Write An Elevator Pitch?" By Cheeky Scientist [3m]
- "Storytelling and Data: Why? How? When?" by Robert Kosara [31m]

Assignments

Discussions | Value 3 x 3 = 9% (Group/Individual)

There will be three Discussions in this course, each marked out of 1 point. In their groups, students will be asked to discuss whether the two data visualizations are "Hot or Not". Your contributions to the Discussions will consist of an original posting and a response to other students' postings. Each Discussion is open for one week.

All students are expected to participate in the online discussions. Each week's discussion will be open on Canvas immediately following the weekly lecture. Your initial posts and responses should be posted in Canvas no later than 11:59pm Eastern time five days after the lecture.

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

Class Participation | Value 5% (Individual)

Students are expected to participate in discussions and activities during lectures. Your participation will be evaluated on the extent to which you demonstrate an understanding of the course content and contribute relevant facts, questions, interpretations, examples, frameworks, and points of view.

The class participation grade is not just to provide you with an incentive to get involved in discussions and share your perspective, but also demonstrate your understanding of the material and your persuasive abilities. Thoughtful questions, rigorous analysis, strong oral presentation skills, and the ability to "think-on-your-feet" are crucial skills. The following questions will be considered in grading participation:

- Does the student attend all classes and participate in discussions?
- Is the student prepared to report facts, analyses, and conclusions?
- Do comments interpret or integrate facts using theories, concepts, and analytical tools presented in the readings and lectures?
- Is the student an effective communicator? Are comments presented in a concise and convincing manner?
- Does the student listen to other comments and able to build on and evaluate other comments? Does the student learn from and show respect for other speakers and their points of view?

Students that are not present for two or more classes will be assigned a class participation grade of 0.

Tableau Quizzes | Value 46% (Individual)

An extension of the Tableau eLearning modules and practice exercises, there will be two Tableau quizzes to test student's knowledge and skills in using Tableau.

Each quiz will contain ten questions with a 25-minute time limit. The quiz is open book with questions based on the content from the previous week's eLearning modules and the Tableau practice exercises.

The quizzes will use the OMIS Store dataset.

Be prepared to answer the quiz questions by having Tableau open on your computer with the OMIS Store dataset loaded.

The quizzes will take place in class, at the beginning of the class. This quiz is to be taken in-class with your laptop.

Project | Value 40% (Group)

OMIS Store Business Performance Analysis

- Groups will create a Tableau report consisting of four interactive dashboards to understand what is driving financial performance for OMIS Store and how to improve sales and profitability.
- Groups will present their analysis, insights, and recommendations to the OMIS Store CEO.
- The project will use the OMIS Store dataset.
- There are two objectives of this project. The first is to use Tableau to analyze data, create visualizations, and construct dashboards and stories to drive actionable insights. The second is to design and deliver an effective presentation to share the insights and recommendations to executives.
- Deliverable will be:
    - Tableau report with four dashboards. Stories may be used to present the dashboards.
    - 12-minute presentation of analysis, insights and recommendations.
- Marking rubric will in the Lecture PPT in the week the project is assigned.

- Each week is a combination of live classes, eLearning modules for Tableau, readings, and videos.
    - The live classes will be approximately 3.0 hours.
    - The eLearning modules for Tableau are ~ 2.0 hours and discuss the weekly Tableau topics.
    - There are Tableau Practice Examples with content that is the basis of the Tableau quizzes.
    - The live classes and eLearning modules are mandatory.
- Also included each week are links to readings and videos from other sources.
    - The readings and videos will reinforce the lecture and eLearning content and depending on your comfort with the topic, you may be able to skim some of the sections of the readings and videos. This is especially true for the videos, as they are very useful but may be lengthy.
- To encourage productive class discussions, it is essential that all students keep up with the lecture content and eLearning modules, readings and videos assigned in this class each week.
- All students are expected to read up on Tableau offline, identify and align skillsets, and practice.

Student Preparation for Class and Class Participation: Expectations

Preparation

Be prepared to review the in-class material, practice the Tableau topics, and complete the graded assignments each week. Each week's material will build on the previous week, so it is important that you have reviewed and understand the previous course material. Seek help when needed. Class slides will be posted on Canvas one week prior to each class.

Class Participation

All students are strongly encouraged to actively participate in class discussions, ask questions, provide relevant and current examples, or challenge the perspectives of your peers and the instructor. This is an opportunity for you to develop your communication, critical analysis, and presentation skills.

Late Assignments
Deadlines are critical for this class. A late assignment will result in a zero for that assignment. Please make sure that you are aware of the deadlines and speak to the instructor in advance of any potential issues that would prevent an assignment being submitted on time. Extensions will only be granted in exceptional circumstances.

Coursework
Coursework should be submitted through Canvas.

Weekly Lectures:
The instructor will post lecture slides and videos to Canvas for each of the 6 weeks of the course. These slides and videos will vary in length depending on the material. It is your responsibility to watch each of the videos.

Use of Mobile Devices, Laptops, etc. during class
Learning research shows that unexpected noises and movement divert and capture people's attention, which means you are affecting everyone's learning experience if your cell phone, laptop, etc. makes noise or is visually distracting during class. For this reason, I ask you to mute your devices during class, and then unmute when you are ready to participate.

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

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.70 and 6.10.

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

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

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

MEMORANDUM

York University Libraries

To: Henry M. Kim, Area Coordinator and Associate Professor, OMIS, Schulich School of Business

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

Date: May 9, 2025

Subject: Library Statement – OMIS 6631: Storytelling with Data

Summary

York University Libraries (YUL) is well positioned to support the proposed course which is an introduction to the fundamental theories of visual communication, data visualization, and data storytelling. Students will learn the fundamentals of how to communicate effectively with data through visualization and storytelling. Major areas for discussion include design principles, data visualization models, dashboards, presentation skills, data stories, and technical tutorials using Tableau software. Students will learn how to bring data to life and present memorable stories that drive action. Faculty and students can make use of an array of library resources and services to meet their research and learning needs. This statement highlights offerings related to the major themes of the course.

Collections

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

- Information visualization, Data visualization, Visual communication, Tableau (Computer file), COMPUTERS/Data Visualization, Storytelling, Communication -- Graphic methods, Business presentations -- Graphic methods, Computer graphics, Statistics -- Graphic methods, Dashboards (Management information systems), Data mining, Business communication -- Data processing, Infographics and Data analysis -- Graphic methods etc.

It is recommended that the instructor use the Copyright Office's Course Reading List/Syllabus Review Service to ensure that the terms of use for the various materials allow for the content to be used in a course. Their staff

can also assist in creating permanent links to library content, which can be embedded in Canvas for easy student access.

The Omni single-search interface provides students with access to a wide range of materials, including books, book chapters, articles, dissertations, streaming media, etc. Library users may also request items from partner libraries through Omni. Based on the librarian's review of class themes and weekly topics, a tailored selection of electronic databases of interest for this course are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings.

Storytelling with Data Databases:

- Gartner IntraWeb
- Scholars Geoportal
- Statista
- Proquest Business
- Business Source Complete
- ACM Digital Library
- IEEE Xplore
- Engineering Village

Newspaper/ Magazine Databases:

- Factiva
- Nexis Uni
- Press Reader

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.

Research Guides of Interest:

- Data Visualization Guide
- Data & Statistics Guide

- Geospatial Data Guide
- Step-by-Step Business Research Tutorials
- Business Citation Guide

Research Help

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

Accessibility Services

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

Schulich
School of Business
York University

New Course Proposal Form
Schulich School of Business

1. Responsible Program: MBAt

2. Responsible Unit: Strategic Management

3. Subject Code (Rubric) and Course Number: MGMT 5400

4. Credit Value: 1.50

5. Long Course Title: Technology and Global Competition

6. Short Course Title: Technology and Global Competition

7. Effective Term/Calendar Year: Fall 2027

8. Language of Instruction: English

9. Calendar (Short) Course Description:

This course provides students with concepts, tools, and knowledge necessary to understand the dynamic relationship between innovations in technology and the global competitive landscape. It examines how firms navigate the geopolitics of trade, international regulations, and diverse national innovation systems, among others, to develop and sustain effective strategies that harness the socio-economic potential of their technologies and know-how.

10. Expanded Course Description:

This course provides students with the concepts, tools, and knowledge necessary to understand the dynamic relationship between innovations in technology and the global competitive landscape. Technology advancements have been important drivers of integrating the world economy and globalization of business. However, the disruptive nature of technological change can also create winners and losers for both people and states and circumvent the political authority and control of national governments. This course emphasizes how business organizations, as one of the primary agents of technological change, balance their objectives of global diffusion and adoption of their technologies and know-how while being attentive to opportunities for and concerns of national governments and local communities across countries at different stages of socio-economic development. Through a set of readings and cases drawn from diverse industries and geographical settings, the course explores the ways in which organizations navigate various aspects of the global environment. Topics will include: the geopolitics of international trade, regulation of

technology-oriented firms, varieties of innovation systems, global value chains, Global South as a source and user of technological innovation, among others.

11. Course Learning Outcomes:

The course is designed for students to:

- think critically about various facets of competition between nations and firms.
- understand the interplay between technological innovation and global competition and how it creates advantages and vulnerabilities.
- be able to identify trade, political, and regulatory challenges faced by technology-oriented firms.
- appreciate the various types and sources of innovations and be able to identify possibilities for organizations to harness these in diverse contexts to achieve broader socio-economic goals.

12. Rationale:

In realizing the global potential of new technologies and business models, firms need to be attentive to both their enabling and disruptive features of technological change. This course emphasizes the need to grasp the paradoxical relationship between technological change and globalization of business and understand how various forces (socio-cultural, political, economic, legal) impact the competitive conditions of technology-oriented firms. By takin a macro-approach to technology and competition, the course complements the more technical and functionally oriented courses that students will take in this program.

13. Evaluation:

Class Attendance and Participation	20%
Participation in Weekly Online Discussions	20%
Written Case Analysis	25%
Individual Research Project	35%

Class Attendance and Participation: This component involves "meaningful" class participation. It refers to contributing to our discussions in a manner that adds value and enriches the quality of our class meetings. Our interest is in the arguments/statements you make and in the plausibility of the reasons you offer in support of them. There are no "right" or "wrong" answers; you will not be graded on whether you agree or disagree with the instructor. One way of contributing is to critically assess the comments of your classmates and/or the instructor; another is to infuse a "fresh" perspective on the issue(s) under study by the class. The grade for this course component will be based on both qualitative and quantitative aspects of participation in the discussions.

You are expected to attend all classes. However, if, for some reason, you must miss a class, you should submit a two-page analysis of the case to be discussed on that class day to the instructor before the class. This can be done via e-mail.

Participation in Weekly Online Discussions: During each class (once a week), we will be taking up a broad topic, and the discussion in the class will leave some unexplored but important issues or may even bring about new issues. The purpose of the online discussions is to continue engagement with these issues. You are expected to take the initiative and start discussion threads where your fellow students can contribute. It is hoped that every week, 2-3 topics related to the subject matter of the previous class and/or related contemporaneous news stories will be discussed in the forum. The initiator of the topic and the responders would each contribute a maximum 250-word write-up each week. It is expected that every student will be able to participate in this forum at least four times during the six-week semester. This component will be graded on both the extent and quality of participation.

Written Case Analysis: Students will complete one individual written analysis for the case, *The Quest for Achieving Financial Inclusion: M-Pesa Versus UPI*. The written report will be due at the beginning of Class 4 and contribute 25% to the overall course grade. The write-up should be in the form of a memo (put yourself in the shoes of Abebi Eke) addressed to the management of the World Bank and should not be more than five double-spaced pages. The analysis does not require outside research, but students can use the two videos linked with the Class 4 readings.

Individual Research Project: Each student will work on a research project throughout the semester. The project will culminate in a 10-page research paper (double-spaced, 12-point font, excluding references and tables/figures) due one week after the last class of the semester. For this project, each student, in consultation with the instructor, will choose a topic related to some aspect of technology and international competition. Students may be interested in a country or a particular issue that applies across economies. The topical area for the project is flexible, and the intention is to allow each student to go in-depth on a topic of individual interest and then develop a meaningful research paper.

The instructor will work closely with students to help them develop the topics to their fullest potential. Accordingly, each student will meet with the instructor one-on-one at least two times during the semester so that the instructor can guide the student and monitor the progress.

14. Integrated Courses: Not Applicable

15. Cross-listed Courses: None

16. Enrolment Notes: This is a core course for the new MBAt program. All students admitted into the program will take this course.

17. Faculty Resources: This is a 1.5 credit course which can be taught by numerous faculty members as part of their normal teaching load.

18. Physical Resources: No additional physical resources, beside the regularly scheduled classroom and occasional break-out rooms for group work, will be required.

19. Bibliography (Library Statement is Attached Separately):

Antras, Pol. Conceptual Aspects of Global Value Chains. *The World Bank Economic Review*, 34(3), 2020: 551-574.

Case: Lina Khan and the FTC: Redefining Antitrust in the Age of Big Tech (HBS Case 9-324-018)

Case: The Quest for Achieving Financial Inclusion: M-Pesa Versus UPI (HKS Case KS1304).

Case: Velong: Rethinking "Made in China: (HBS Case 9-323-064)

Case: Volkswagen's Global Dilemmas: Deglobalization and the Rise of Electric Vehicles. (Ivey Publishing W41558)

Christensen, Clayton M., Heiner Baumann, Rudy Ruggles, and Thomas M. Sadtler. Disruptive Innovation for Social Change. *Harvard Business Review*, December 2006.

Davis, Nicholas, Mark Esposito, and Landry Signe, The Anatomy of Technology Regulation. Brookings. (https://www.brookings.edu/articles/the-anatomy-of-technology-regulation), February 27, 2022.

DeepSeek Poses a Challenge to Beijing as much to Silicon Valley. *The Economist*, January 29, 2025.

Engler, Alex. The EU and U.S. are Starting to Align on AI Regulation. Brookings (www.brookings.edu), February 1, 2022.

Feakin, Tobias. Navigating the New Geopolitics of Tech. *Harvard Business Review*, November 11, 2024 (Reprint HO8GJW)

Garfield, David and Sudeep Suman. How to Build a Strategy for Coming Trade Battles. *Harvard Business Review Digital Article*, January 8, 2025 (Reprint HO8KU8).

Ghemawat, Pankaj. Even in a Digital World, Globalization is Not Inevitable. *Harvard Business Review*, February 1, 2017.

Hout, Thomas M. and Pankaj Ghemawat, Pankaj. China vs the World. Whose Technology Is It? *Harvard Business Review*, December 2010.

Howitt, Peter. Innovation, Competition and Growth: A Schumpeterian Perspective on Canada's Economy. C.D. Howe Institute Commentary, April 2007.

Khanna, Tarun. When Technology Gets Ahead of Society. *Harvard Business Review*, July-August 2018.

Lawrence, Leah. Cleantech and the Competitive Advantage of Nations. Centre for International Governance Innovation. www.cigioline. April 25, 2017.

Petit, Nicolas and David J. Teece. Innovating Big Tech Firms and Competition Policy: Favoring Dynamic Over Static Competition. *Industrial and Corporate Change*. 30, 2021, 1168-1198.

Southern Oscillation: America's Internet Giants are Being Outplayed in the Global South. *The Economist*, January 9, 2025.

Stackpole, Thomas. What TikTok's Fate Will Mean for Global Business. *Harvard Business Review* Digital Article, January 27, 2025 (Reprint HO8LQF).

Taneja, Hemant and Fareed Zakaria. AI and the New Digital Cold War. *Harvard Business Review*, Digital Article, September 6, 2023. (Reprint HO7RQO)

Technology and Competition: Collusion and Collisions. *The Economist*, February 27, 2021: 55-58.

The New Industrial Policy: Return to Picking Winners. *The Economist*, January 15, 2022: S4-S6.

Umeh, Elo. Digital Transformation in Africa Requires Homegrown Solutions. *Harvard Business Review* (Digital Article) December 15, 2021 (Reprint H06RGF).

Varadarajan, Raj, Gary Wang, Michael McAdoo, and Marc Gilbert. The Unwinding of Global Tech Supply Chains. Boston Consulting Group, March 23, 2023. https://www.bcg.com/publications/2023/the-unwinding-of-global-tech-supply-chains

Video 1: M-Pesa Segment. https://www.youtube.com/watch?v=rloG1sGBCKE&t=253s

Video 2: UPI. https://www.youtube.com/watch?v=zkAtVnpBZag

Zúñiga, Nicholas, Saheli Datta Burton, Filippo Blancato, Madeline Carr. The Geopolitics of Technology Standards: Historical Context for US, EU and Chinese Approaches. *International Affairs*, Volume 100, Issue 4, July 2024, Pages 1635–1652, https://doi.org/10.1093/ia/iiae124.

Schulich
School of Business
York University

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

20. Instructors and Faculty Coordinator

Initial instructor: Preet S. Aulakh

Alternative instructors: Theodoros Tolias

Course coordinator: Preet S. Aulakh

21. Specializations

Primary area or specialization: Management

Secondary areas or specializations: International Business

22. Student Contact and Enrolment

Contact hours: 18

Maximum enrolment: 55

Expected enrolment: 45-50

Evidence for enrolment expectations: School's aspirations for the first cohort in this new program.

23. Human Participants Research: N/A

24. **Conditions for Approval:** None. This is a core course for a new program

Originator:

Signature	February 25, 2025 Date
Preet S. Aulakh Name	Strategic Management/International Business Area or Specialization

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

Anoop Madhok (Strategic Management)
Theodore Peridis (Strategic Management)
Yigang Pan (Marketing/International Business)
Yuval Deutsch (Strategic Management/Entrepreneurship)
Ashwin Joshi (Marketing)
Majid Majzoubi (Strategic Management)

Approvals

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

Signature | February 25, 2025 Date

Preet S. Aulakh
Name of Coordinator or Director

Strategic Management
Area or Specialization

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

Signature | Date

Name of Program Director | Program

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York University

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

Kevin Tasa	November 20, 2025
Signature	Date
Kevin Tasa	Master Programs Committee
Name of Committee Chair	Committee

MGMT 5400 1.5: TECHNOLOGY AND GLOBAL COMPETITION

TECHNOLOGY AND GLOBAL COMPETITION

COURSE INFORMATION AND SCHEDULE

Instructor: Dr. Preet S. Aulakh
Office: N305C Schulich Building
Telephone: (416) 346-3244
e-mail: paulakh@schulich.yorku.ca
Office Hours: By Appointment
Assistant: Stephanie Allen, N305A SSB, sallen@schulich.yorku.ca

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Brief Description

This course provides students with concepts, tools, and knowledge necessary to understand the dynamic relationship between innovations in technology and the global competitive landscape. It examines how firms navigate the geopolitics of trade, international regulations, and diverse national innovation systems, among others, to develop and sustain effective strategies that harness the socio-economic potential of their technologies and know-how.

About the Instructor

Preet S. Aulakh is Professor of Strategy and the Pierre Lassonde Chair in International Business at the Schulich School of Business, York University**.** He holds PhD degrees in Law (Osgoode Hall Law School at York University) and Business (University of Texas at Austin), and BS (Mathematics) and MA (History) degrees from Panjab University, Chandigarh, India. Before joining Schulich, he taught for several years in the US and has held visiting positions at the Indian School of Business and the Indian Institute of Management Calcutta. He has published numerous articles on international alliances, technology licensing and cross-border knowledge transfers. His recent research focuses on firms from emerging economies and explores how institutional factors influence their internationalization paths. His books include *Rethinking Globalization(s)* (Macmillan, 1999), *Mobilities of Labour and Capital in Asia* (Cambridge University Press, 2020), *Coping with Global Institutional Change* (Cambridge University Press, 2022), and *Empire and the Peasant Proprietor* (Oxford University Press, 2025).

MEMORANDUM

York University Libraries

To: Preet S. Aulakh, Professor of Strategy, Schulich School of Business

From: Sophie Bury, Teaching & Learning Librarian, Student Learning & Academic Success

Date: February 26th, 2025

Subject: Library Statement – MGMT 5400: Technology and Global Competition

Summary

York University Libraries (YUL) is well positioned to support the proposed 1.5 credit (6-week) course which focuses on teaching students about the dynamic relationship between innovations in technology and the global competitive landscape by equipping them with needed concepts, tools and knowledge. This course explores how firms navigate areas such as the geopolitics of trade, international regulations, and diverse national innovation systems. It also examines effective strategies firms can develop to leverage the socio-economic potential of their technologies and know-how. Students can make use of an array of library resources and services to complete the assignments 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 that intersect with themes in this course, such as:

- Technological innovations, International business enterprises, International trade, Management, Strategic planning, Commercial policy, Geopolitics, Global Value Chain, Globalization, and Competition.

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

Many of the readings students are asked to consult in this course constitute articles available through the library's ejournal subscriptions or are available through links provided by the professor on the free web. It is noted that quite a few readings from the *Harvard Business Review* are listed for this course and we advise the professor consult our *Harvard Business Review* Guide to obtain permalinks for these articles 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 allow for the content to be used in a course. The required cases which form readings in this course, including 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 that are freely accessible to students.

Based on the librarian's review of class themes, weekly topics, and the course assignments 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.

Core Country, Market & Industry Reports Research Databases:

- FitchConnect/BMI
- Statista
- Passport
- Gartner Intraweb
- Marketline Advantage
- IBISworld

Core Company Research Databases:

- Mergent Online
- Marketline Advantage
- Mergent Intellect
- S&P Capital IQ

Core Business and Technology Publication Databases:

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

Newspaper/ Magazine Databases:

- Factiva
- Nexis Uni
- Press Reader

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:

- Market Research Guide
- Company Research Guide
- Industry Research Guide
- Country and International Business Information Research Guide
- Business Cases Research Guide
- Business Citation Guide
- Step-by-Step Business Research Tutorials

Research Help

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

Accessibility Services

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

Contents

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Course Format	2
Course Materials	3
Evaluation Scheme (Summary and Detailed Descriptions)	3
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Weekly Course Schedule	7

Course Description

This course provides students with the concepts, tools, and knowledge necessary to understand the dynamic relationship between innovations in technology and the global competitive landscape. Technology advancements have been important drivers of integrating the world economy and globalization of business. However, the disruptive nature of technological change can also create winners and losers for both people and states and circumvent the political authority and control of national governments. This course emphasizes how business organizations, as one of the primary agents of technological change, balance their objectives of global diffusion and adoption of their technologies and know-how while being attentive to opportunities for and concerns of national governments and local communities across countries at different stages of socio-economic development. Through a set of readings and cases drawn from diverse industries and geographical settings, the course explores the ways in which organizations navigate various aspects of the global environment. Topics will include: the geopolitics of international trade, regulation of technology-oriented firms, varieties of innovation systems, global value chains, among others.

Course Learning Outcomes

The course is designed for students to:

- think critically about various facets of competition between nations and firms.
- understand the interplay between technological innovation and global competition and how it creates advantages and vulnerabilities.
- be able to identify trade, political, and regulatory challenges faced by technology-oriented firms.
- appreciate the various types and sources of innovations and be able to identify possibilities for organizations to harness these in diverse contexts to achieve broader socio-economic goals.

Course Format

The major components of learning in this course are case analyses, in-class and online discussions, and a research project. Cases have been chosen to represent different types of firms across industries and encompass diverse geographical settings to enhance understanding of the various organizational, environmental, and institutional factors impacting competition and firm decision-making in particular geographical settings. The goal is not to become experts about one

country or region; we seek broad principles that can be applied across many countries, industries, and firms. The course will also include discussions of the articles in the course packet and short lectures. The lectures are intended to integrate and complement the issues raised in the cases and readings. Students must carefully read the assigned material before the class for which it is due. Extensive in-class participation is critical for the success of the class.

Course Materials

The course is built on a foundation of conceptual readings applied in a series of practical case studies. Students must purchase the course packet from the York University Bookstore. The in-class discussions will delve deeper into the readings and cases; thus, students must have physical copies during the classes.

Evaluation Scheme

Class Attendance and Participation	20%
Participation in Weekly Online Discussions	20%
Written Case Analysis	25%
Individual Research Project	35%

In this class, final letter grades will be determined by aggregating the components above. See Schulich and the grade grading policy below.

Class Attendance and Participation

This component involves "meaningful" class participation. It refers to contributing to our discussions in a manner that adds value and enriches the quality of our class meetings. Our interest is in the arguments/statements you make and in the plausibility of the reasons you offer in support of them. There are no "right" or "wrong" answers; you will not be graded on whether you agree or disagree with the instructor. One way of contributing is to critically assess the comments of your classmates and/or the instructor; another is to infuse a "fresh" perspective on the issue(s) under study by the class. The grade for this course component will be based on both qualitative and quantitative aspects of participation in the discussions.

You are expected to attend all classes. However, if, for some reason, you must miss a class, you should submit a two-page analysis of the case to be discussed on that class day to the instructor before the class. This can be done via e-mail.

Participation in Weekly Online Discussions

During each class (once a week), we will be taking up a broad topic, and the discussion in the class will leave some unexplored but important issues or may even bring about new issues. The purpose of the online discussions is to continue engagement with these issues. You are expected to take the initiative and start discussion threads where your fellow students can contribute. It is hoped that every week, 2-3 topics related to the subject matter of the previous class and/or related contemporaneous news stories will be discussed in the forum. The initiator of the topic

and the responders would each contribute a maximum 250-word write-up each week. It is expected that every student will be able to participate in this forum at least four times during the six-week semester. This component will be graded on both the extent and quality of participation.

Written Case Analysis

You will complete one individual written analysis for the case, *The Quest for Achieving Financial Inclusion: M-Pesa Versus UPI*. The written report will be due at the beginning of Class 4 and contribute 25% to the overall course grade. Your write-up should be in the form of a memo (put yourself in the shoes of Abebi Eke) addressed to the management of the World Bank and should not be more than five double-spaced pages. You do not need to do outside research for this case analysis, but you can use the two videos linked with the Class 4 readings.

Individual Research Project

Each student will work on a research project throughout the semester. The project will culminate in a 10-page research paper (double-spaced, 12-point font, excluding references and tables/figures) due one week after the last class of the semester. For this project, each student, in consultation with the instructor, will choose a topic related to some aspect of technology and international competition. Students may be interested in a country or a particular issue that applies across economies. The topical area for the project is flexible, and the intention is to allow each student to go in-depth on a topic of individual interest and then develop a meaningful research paper.

The instructor will work closely with students to help them develop the topics to their fullest potential. Accordingly, each student will meet with the instructor one-on-one at least two times during the semester so that the instructor can guide the student and monitor the progress.

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

Students' overall mark will be derived by weighting each grading component according to the proportions described above. All grades (i.e., grades for each component as well as the overall grade) will be converted using the following scale:

GRADE	GRADE POINT	PERCENTAGE	DESCRIPTION
A+	9	≥91-100	Exceptional
A	8	≥86-90	Excellent
A-	7	≥80-85	Very Good
B+	6	≥75-79	Good
B	5	≥70-74	Competent
B-	4	≥65-69	Marginally Competent
C+	3	≥60-64	Passing
C	2	≥55-59	Barely Passing
C-	1	≥50-54	Marginal Pass
F	0	< 50%	Failed

(Students are reminded that they must maintain a cumulative GPA of at least 4.2 to remain in good standing and continue in the program, and a minimum of 4.4 to qualify for their degree. Schulich grading guidelines mandate a section grade point average ['GPA'] of *between 4.7 and 6.1* for core courses and a section GPA of between 5.2 and 6.2 for electives.)
For more details on the index, grading policy, and grade point average (GPA) requirements, see the Student Handbook or the Student Services & International Relations website:
http://schulich.yorku.ca/client/schulich/schulich_lp4w_lnd_webstation.nsf/page/Academic+Policies+BBA?OpenDocument

Academic honesty is fundamental to the integrity of university education and degree programs and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may be found in the Student Handbook and on the Student Services & International Relations website:
http://www.schulich.yorku.ca/client/schulich/schulich_lp4w_lnd_webstation.nsf/page/Academic+Honesty!OpenDocument

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

Weekly Course Schedule[1]

Week 1

Introduction to the Course and Expectations

Technological Change and the Parameters of Global Competition

- Petit, Nicolas and David J. Teece. Innovating Big Tech Firms and Competition Policy: Favoring Dynamic Over Static Competition. *Industrial and Corporate Change*. 30, 2021, 1168-1198.
- Technology and Competition: Collusion and Collisions. *The Economist*, February 27, 2021: 55-58.
- The New Industrial Policy: Return to Picking Winners. *The Economist*, January 15, 2022: S4-S6.
- Howitt, Peter. Innovation, Competition and Growth: A Schumpeterian Perspective on Canada's Economy. C.D. Howe Institute Commentary, April 2007.
- Taneja, Hemant and Fareed Zakaria. AI and the New Digital Cold War. *Harvard Business Review*, Digital Article, September 6, 2023. (Reprint HO7RQO)

Week 2

Surviving Geopolitics and the Global Trade Wars

- Feakin, Tobias. Navigating the New Geopolitics of Tech. *Harvard Business Review*, November 11, 2024 (Reprint HO8GJW)
- Garfield, David and Sudeep Suman. How to Build a Strategy for Coming Trade Battles. *Harvard Business Review Digital Article*, January 8, 2025 (Reprint HO8KU8).
- Zúñiga, Nicholas, Saheli Datta Burton, Filippo Blancato, Madeline Carr. The Geopolitics of Technology Standards: Historical Context for US, EU and Chinese Approaches. *International Affairs*, Volume 100, Issue 4, July 2024, Pages 1635–1652, https://doi.org/10.1093/ia/iiae124.
- Case: Volkswagen's Global Dilemmas: Deglobalization and the Rise of Electric Vehicles. (Ivey Publishing W41558)

[1] Given the dynamic nature of global business, some of the readings will be updated depending on the contemporaneous issues when the course is taught.

Week 3

Navigating the Global Regulatory Environment

- Davis, Nicholas, Mark Esposito, and Landry Signe, The Anatomy of Technology Regulation. Brookings. (https://www.brookings.edu/articles/the-anatomy-of-technology-regulation), February 27, 2022.
- Engler, Alex. The EU and U.S. are Starting to Align on AI Regulation. Brookings (www.brookings.edu), February 1, 2022.
- Stackpole, Thomas. What TikTok's Fate Will Mean for Global Business. *Harvard Business Review* Digital Article, January 27, 2025 (Reprint HO8LQF).
- Case: Lina Khan and the FTC: Redefining Antitrust in the Age of Big Tech (HBS Case 9-324-018)

Week 4

Leveraging Technology for Societal Good

- Christensen, Clayton M., Heiner Baumann, Rudy Ruggles, and Thomas M. Sadtler. Disruptive Innovation for Social Change. *Harvard Business Review*, December 2006.
- Umeh, Elo. Digital Transformation in Africa Requires Homegrown Solutions. *Harvard Business Review* (Digital Article) December 15, 2021 (Reprint H06RGF).
- Khanna, Tarun. When Technology Gets Ahead of Society. *Harvard Business Review*, July-August 2018.
- Case: The Quest for Achieving Financial Inclusion: M-Pesa Versus UPI (HKS Case KS1304).
- Video 1: M-Pesa Segment. https://www.youtube.com/watch?v=rloG1sGBCKE&t=253s
- Video 2: UPI. https://www.youtube.com/watch?v=zkAtVnpBZag

Written Case Analysis Due

Week 5

Understanding Varieties of Innovation Systems

- Hout, Thomas M. and Pankaj Ghemawat, Pankaj. China vs the World. Whose Technology Is It? *Harvard Business Review*, December 2010.
- DeepSeek Poses a Challenge to Beijing as much to Silicon Valley. *The Economist*, January 29, 2025.
- Southern Oscillation: America's Internet Giants are Being Outplayed in the Global South. *The Economist*, January 9, 2025.
- Lawrence, Leah. Cleantech and the Competitive Advantage of Nations. Centre for International Governance Innovation. www.cigioline. April 25, 2017.

Week 6

Reconfiguring Global Value Chains

- Antras, Pol. Conceptual Aspects of Global Value Chains. *The World Bank Economic Review*, 34(3), 2020: 551-574.
- Varadarajan, Raj, Gary Wang, Michael McAdoo, and Marc Gilbert. The Unwinding of Global Tech Supply Chains. Boston Consulting Group, March 23, 2023. https://www.bcg.com/publications/2023/the-unwinding-of-global-tech-supply-chains
- Case: Velong: Rethinking "Made in China: (HBS Case 9-323-064)

Conclusions: Bringing it All Together

- Ghemawat, Pankaj. Even in a Digital World, Globalization is Not Inevitable. *Harvard Business Review*, February 1, 2017.

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Murat Kristal, Tech MBA Program Director
Date: November 20, 2025
Re: New Course Proposals to Support the Tech MBA Detailed Minor Modification

Motion: that Faculty Council and Master Programs Committee approve the new course proposals for SB/ECON 5111 3.00, SB/MKTG 5210 3.00, SB/OMIS 6010 3.00, SB/MGMT 6010 3.00 and the change to existing course proposal for SB/MGMT 6110 6.00.

Rationale: These proposals are introduced to support the Detailed Minor Modification to the Tech MBA to deepen students' technical and analytical capabilities in emerging areas such as data analytics, artificial intelligence, enterprise risk management, IT architecture, and design thinking. These additions ensure that the program continues to reflect the evolving demands of the technology and digital transformation sectors.

Schulich
School of Business
York University

New Course Proposal Form
Schulich School of Business

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

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

1. Responsible Program: MBA in Technology Leadership

2. Responsible Unit: MGMT

3. Subject Code (Rubric) and Course Number: MGMT 6010

4. Credit Value: 1.50

5. Long Course Title: Introduction to Business Contracts

6. Short Course Title: Introduction to Business Contracts

7. Effective Term/Calendar Year: Fall 2027

8. Language of Instruction: English

9. Calendar (Short) Course Description:
This course introduces students to the fundamentals of contract law as it relates to business and the people who work in it. The first half of the course deals with essential concepts such as: the elements of a legally binding contract, the various forms that contracts take, and what happens when an agreement breaks down. The second half of course explores the current business practices of contractual negotiations, policies that limit what contracts can do, employment agreements, and the interplay between business, technology, and the law.

Prerequisites/Corequisites/Course Exclusions: None.

10. Expanded Course Description:
Course content and assignments are roughly split into two halves. The first covers foundational concepts of contract law generally—and business contracts more specifically—which seeks to give students a working understanding of contract

fundamentals and how to "speak the language" of legal professionals. The in-class midterm will evaluate students' grasp of these concepts. In the second half of the course, lessons and class discussions will engage students in how to practically apply this foundational knowledge. With the guidance of the course instructor and specialist guest lecturers, students will explore the modern business realities of contractual negotiations, what contracts can and can't achieve in different contexts, the unique complexities and legal protections associated with employment agreements, issues of privacy and confidentiality, and the constantly changing relationships between business, technology, and the law. The final course assignment will focus on students' ability to think like a business lawyer by understanding risk and balancing legal and business objectives.

11. Course Learning Outcomes:

The learning outcomes of this course are:

- To demystify the law of contracts by familiarizing students with the fundamental concepts and language of legal agreements, and to build a functional understanding of how contracts achieve practical business goals.
- To provide students with an understanding of the most common modern business practices of contractual negotiation.
- To allow students to achieve a level of proficiency with business contracts that will enable them to communicate and work effectively with legal professionals.
- To facilitate learning and discussion on contract issues that will be directly relevant to students in the business world (employment contracts, privacy, emerging technologies, etc.).

12. Rationale:

This is a required 6-week course in the TechMBA Program that will be offered in Term 4.

13. Evaluation:

Deliverables at a Glance

Assignment/Task	Quantity	% Weight	Total %	Author	Due Date
Class Participation			**20%**		
In-Class	N/A	10%	10%	Individual	Each Class
Peer Learning Activity	N/A	10%	10%	Individual	Weeks 2, 3, 5, & 6
Mid-Term Test	1		**40%**	Individual	Week 4
RFT Assignment	1		**40%**	Individual	Week 6
			100%		

Written Assignments/Projects: Descriptions

Due Date	
Each Class	<u>Class Participation</u> This relates to both class attendance, and how students contribute to class discussions each week. Quality is far more important than quantity. To help prepare for the weekly class lecture and discussion, students are expected to read the assigned readings. Students are also encouraged to do further research into class topics that may be of personal interest, and share relevant outside knowledge. *In-Class Max length: N/A* *In-Class Value: 10%*
Weeks 2, 3, 5, & 6	<u>Peer Learning Activity</u> Within small groups, one student each week will be assigned a basic contractual concept (or piece of "legal jargon") that they will be responsible for researching, understanding, and then teaching to their group members. Afterwards, the course instructor will choose a group for each concept, and that group's chosen representative (who is not the peer teacher that week) will be asked to relay that concept to the class. *In-Class Max length: 5 minute discussions.* *In-Class Value: 10%*
Week 4	<u>In-class Midterm</u> Students will write a 30-minute, closed book test, evaluating their understanding of the course material and readings from the first three weeks of the course. Material from optional readings will not be tested, except to the extent they may have been covered in class. *Max length: 30 minutes.* *Value: 40%*
Week 6	<u>Final Assignment: Request for Tender ("RFT")</u> The course instructor will issue a simulated request for tender, containing product requirements and a draft agreement. Students, representing their simulated businesses, will submit a tender response. Using information provided in the assignment fact sheet, students will be responsible for drafting their tender, including pricing and proposed

Due Date

comments/revisions to the draft agreement. Applying practical negotiation skills, students will need to balance protecting their business' financial and legal interests, while keeping their tender attractive to the buyer in an effort to "win" the contract.

Max length: See above
Value: 40%

Evaluation of Written Assignments/Projects

Late assignments are <u>not accepted</u>. A late assignment will result in a zero for that assignment. There is no way to make up for a missed assignment. I do not offer additional assignments or extra work in lieu of a missed assignment. Given these facts, please pay close attention to deadlines. Please upload all assignments on Canvas.

My turnaround time for grading is 1 week. This will give you ample time to learn from my feedback on your performance.

Detailed grading schemes will be provided on Canvas.

Calculation of Course Grade

In this class, final course grades will be determined by the following process: Students' final mark will be derived by weighting each grading component according to the proportions described above. Grades will be converted using the following scale:

GRADE	GRADE POINT	PERCENTAGE	DESCRIPTION
A+	9	≥91-100	Exceptional
A	8	≥86-90	Excellent
A-	7	≥80-85	Very Good
B+	6	≥75-79	Good
B	5	≥70-74	Competent
B-	4	≥65-69	Marginally Competent
C+	3	≥60-64	Passing
C	2	≥55-59	Barely Passing
C-	1	≥50-54	Marginal Pass
F	0	< 50%	Failed

14. Integrated Courses:[JY1]
This is required course in the MBA in Technology Leadership Program.

15. Cross-listed Courses:
This course will not be cross-listed with any other program.

16. Enrolment Notes:
This is a required course for the MBA in Technology Leadership program.

17. Faculty Resources:
The course will be taught annually. Part-time faculty members who are lawyers will teach this course.

18. Physical Resources:
The course will be taught in an existing Schulich classroom.

19. Bibliography and Library Statement:

Class 1 — Class Introduction, The What and Why of Contracts, and Contract Fundamentals I

Read:

1. Department of Justice Canada (2021). Where our legal system comes from. https://www.justice.gc.ca/eng/csj-sjc/just/03.html
2. LBAC – chapter 6: Formation of a Contract: Offer and Acceptance.

Optional:

1. Hyde v Wrench [1840] EWHC Ch J90. https://www.bailii.org/ew/cases/EWHC/Ch/1840/J90.html

In-Class Exercise:

- Form Groups for peer learning.

Class 2 — Contract Fundamentals II, & Different Types of Agreements

Read:

1. LBAC – Chapter 7: Formation of a Contract: Consideration and Intention
2. Headnote to: R. (Ont.) v. Ron Engineering, [1981] 1 S.C.R. 111. https://decisions.scc-csc.ca/scc-csc/scc-csc/en/item/2504/index.do.

3. LinkedIn App End User License Agreement. https://web.archive.org/web/20250309010237/https://www.linkedin.com/legal/eula.

Optional:

1. Full decision for R. (Ont.) v. Ron Engineering (see #2 above).

In-Class Exercise:

- Peer learning activity
- Assigning and discussing the final assignment

Class 3 Risks, Remedies, and Practical Negotiations (with Guest Lecture)

Read:

LBAC – chapter 13: Breach of Contract and Its Remedies
Guest lecturer materials: [TBD].

Guest Lecturer: [TBD]

In-Class Exercise:

- Peer learning activity
- Brief Q&A on the midterm

Class 4 Freedom of Contract vs. Limitations

Read:

1. LBAC – chapter 14: Sale of Goods and Consumer Contracts.

Optional:

1. LBAC – chapter 8: Formation of a Contract: Capacity to Contract and Legality of Object.
2. Department of Justice Canada (2021). A Report on the Relationship between Restorative Justice and Indigenous Legal Traditions in Canada. https://www.justice.gc.ca/eng/rp-pr/jr/rjilt-jrtja/p5.html.

In-Class Exercise:

- **In-class mid-term test**

Class 5 Employment Contracts (with Guest Lecture)

Read:

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1. LBAC – chapter 18: The Contract of Employment.
2. Guest lecturer materials: [TBD].
3. Competition Act, RSC 1985 c C-34. **Sections 45(1.1) and (2) only**. https://laws-lois.justice.gc.ca/eng/acts/c-34/section-45.html.

Optional:

1. Parr, S. (2025). Non Compete vs Non Solicitation in Canada: Key Differences Explained. Parr Business Review. https://www.parrbusinesslaw.com/blog/non-compete-vs-non-solicitation-canada.

Guest Lecturer: [TBD]

In-Class Exercise:

- Peer learning activity
- Brief Q&A on final assignment

Class 6 Technology, Confidentiality, and Privacy (with Guest Lecture)

Read:

1. Charkoudian, S. and Tene, O. (2024). Contracting around AI: Reading the fine print. https://iapp.org/news/a/contracting-around-ai-reading-the-fine-print.
2. Office of the Privacy Commissioner of Canada (2024). PIPEDA requirements in brief. https://www.priv.gc.ca/en/privacy-topics/privacy-laws-in-canada/the-personal-information-protection-and-electronic-documents-act-pipeda/pipeda_brief/.
3. Guest lecturer materials: [TBD].

Optional

1. Mangan, D. (2023). Judge sanctions lawyers for brief written by A.I. with fake citations. https://www.cnbc.com/2023/06/22/judge-sanctions-lawyers-whose-ai-written-filing-contained-fake-citations.html.
2. James, M. (1999). E-signatures allow contracts via mouse and modem, not pen and paper. The Baltimore Sun. https://books.google.ca/books?id=6YVGAAAAIBAJ&lpg=PA41&dq=Electronic%20Signature%201999&pg=PA41#v=onepage&q&f=false.

Guest Lecturer: [TBD]

Final assignment due

In-Class Exercise:

- Peer learning activity

Statement from University Librarian Certifying Adequate Library Resources to Support the Course: Attached

Schulich
School of Business
York University

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

20. Instructors and Faculty Coordinator

Initial instructor: Joe Yule

Alternative instructors: Mehmet Murat Kristal

Course coordinator: Joe Yule

21. Specializations[JY2]

Primary area or specialization:

Secondary areas or specializations: None

22. Student Contact and Enrolment

Contact hours: 18 hours

Maximum enrolment: Core Course = 55

Expected enrolment: 50

Evidence for enrolment expectations: This is a required course in the Tech MBA. Enrollment in the Tech MBA is showing steady growth.

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

a. Lectures 1 and 4 will touch on indigenous legal issues. Lecture 1 will explore the similarities and differences between common law contracts and other kinds of legally recognized agreements, including indigenous treaties. Lecture 4 will examine the growing recognition of indigenous legal traditions by Canadian courts, and the implications this may have regarding freedom of contract in the future.

24. Human Participants Research: N/A

25. Conditions for Approval

Schulich
School of Business
York University

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

a) **The Area is deleting courses with at least the same total number of credits.**
Specify the course or courses being deleted.

b) **Provide a convincing case for the proposed course.**
State the reason the program needs this new course and provide evidence that the Area has no elective with student enrolments low enough to warrant deletion. Approval from the ADA will be required.

Originator:

Signature	Date
Joe Yule	Law
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.

Guangrui Kayla Li	OMIS
Isik Bicer	OMIS
Vibhuti Dhingra	OMIS
Henry M. Kim	OMIS
Markus Biehl	OMIS
Murat Kristal	OMIS

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

Signature	Date
Name of Coordinator or Director	Area or Specialization

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

	March 10th, 2025
Signature	Date
Mehmet Murat Kristal	MBA in Technology Leadership
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	November 20, 2025
Signature	Date
Kevin Tasa	Master Programs Committee
Name of Committee Chair	Committee

MGMT 6010 1.5 : Introduction to Business Contracts

Course Outline
Fall 2027

<Class day[s]>, <Time>, beginning on <month/day>
<Class location>
<Lab day>, <Time> (if applicable)
<Lab location> (if applicable)

Instructor
Joe Yule
R:
T:
E:
W:
Office hours: By Appointment

Assistant
<Name>
<Office>
<Phone>
<email>

Joe Yule is a practicing in-house legal counsel specializing in contracts and privacy law in the technology industry. He received his JD from the University of Toronto Faculty of Law and is certified as a Canadian information privacy professional. Beyond his regular practice, Joe's areas of interest include constitutional law, legal philosophy, and the history of the common law.

Brief Description
This course introduces students to the fundamentals of contract law as it relates to business and the people who work in it. The first half of the course deals with essential concepts such as: the elements of a legally binding contract, the various forms that contracts take, and what happens when an agreement breaks down. The second half of course explores the current business practices of contractual negotiations, policies that limit what contracts can do, employment agreements, and the interplay between business, technology, and the law.

Prerequisites/Corequisites/Course Exclusions:

Contents

Course Learning Outcomes 2
Deliverables at a Glance 2
Course Material 2
Student Preparation for Class and Class Participation: Expectations 2
Class-by-Class Syllabus 2
Written Assignments/Projects: Descriptions 5

Evaluation of Written Assignments/Projects 6
Calculation of Course Grade 6
General Academic Policies: Grading, Academic Honesty, and Accommodations 7
Quick Reference: Summary of Classes, Activities and Deliverables 7

Course Learning Outcomes

The learning outcomes of this course are:

- To demystify the law of contracts by familiarizing students with the fundamental concepts and language of legal agreements, and to build a functional understanding of how contracts achieve practical business goals.
- To provide students with an understanding of the most common modern business practices of contractual negotiation.
- To allow students to achieve a level of proficiency with business contracts that will enable them to communicate and work effectively with legal professionals.
- To facilitate learning and discussion on contract issues that will be directly relevant to students in the business world (employment contracts, privacy, emerging technologies, etc.).

Deliverables at a Glance

Assignment/Task	Quantity	% Weight	Total %	Author	Due Date
Class Participation			**20%**		
In-Class	N/A	10%	10%	Individual	Each Class
Peer Learning Activity	N/A	10%	10%	Individual	Weeks 2, 3, 5, & 6
Mid-Term Test	1		**40%**	Individual	Week 4
RFT Assignment	1		**40%**	Individual	Week 6
			100%		

For details, see "Written Assignments/Projects Descriptions" (p. 5) and "Evaluation of Written Assignments/Projects" (p. 6).

Course Material

The course consists of in-person lectures and discussions, where active participation is expected. Lectures may include slides, but these are merely supplemental visual aids and should not be taken as comprehensive study materials.

Course readings will be a combination of online articles, relevant case law, and sections of the primary course textbook: Smyth, Soberman, Easson & McGill, **The Law and Business Administration in Canada**, 15th. Edition (©2020) – Pearson Education ("LBAC").

Student Preparation for Class and Class Participation: Expectations

Preparation. Coming to class prepared and ready to discuss the material is critical to make this course an enjoyable and valuable learning experience. You are expected to be present, prepared, and willing to

share your views in every class, both voluntarily and when called upon to do so. Try to consistently contribute with comments that pass the "so-what" test by providing insightful analysis that builds on the prior discussion and moves our thinking forward. Students are welcome to share outside knowledge and experience where relevant to the class discussion. Since course concepts and material like case law may be new to students, I do not aim to penalize good faith misconceptions or confusion. Other students may share your misunderstanding, and these can provide valuable learning opportunities.

***Class Participation*.** Your Class Participation Grade is based on your attendance, contributions to in-class discussions, and awareness of issues in the required readings (10% of your total mark is in-class participation). It is also based on your participation on in-class peer learning activities, which is explained in more detail below (10% of your total mark).

Classroom Etiquette: Please do your part to keep class discussions respectful and constructive. Enthusiasm is a plus!

***Important:* Late assignments are <u>not accepted</u>.** A late assignment will result in a zero for that assignment. There is no way to make up for a missed assignment. I do not offer additional assignments or extra work in lieu of a missed assignment. Given these facts, please pay close attention to deadlines.

Class-by-Class Syllabus

Topics, readings, and assessments for every class are listed below.

> Please Note: If any changes in this schedule become necessary, notifications will be posted on Canvas, and when changes need to be announced between classes, an email will be sent to students' Schulich email accounts, notifying them of the change.

Class 1 <u>Class Introduction, The What and Why of Contracts, and Contract Fundamentals I</u>

Read:

1. Department of Justice Canada (2021). Where our legal system comes from. https://www.justice.gc.ca/eng/csj-sjc/just/03.html
2. LBAC – chapter 6: Formation of a Contract: Offer and Acceptance.

Optional:

1. Hyde v Wrench [1840] EWHC Ch J90. https://www.bailii.org/ew/cases/EWHC/Ch/1840/J90.html

In-Class Exercise:

- Form Groups for peer learning.

Class 2 <u>Contract Fundamentals II, & Different Types of Agreements</u>

Read:

- LBAC – Chapter 7: Formation of a Contract: Consideration and Intention
- Headnote to: R. (Ont.) v. Ron Engineering, [1981] 1 S.C.R. 111. https://decisions.scc-csc.ca/scc-csc/scc-csc/en/item/2504/index.do.

- LinkedIn App End User License Agreement. https://web.archive.org/web/20250309010237/https://www.linkedin.com/legal/eula.

Optional:

- Full decision for R. (Ont.) v. Ron Engineering (see #2 above).

In-Class Exercise:

- Peer learning activity
- Assigning and discussing the final assignment

Class 3 Risks, Remedies, and Practical Negotiations (with Guest Lecture)

Read:

1. LBAC – chapter 13: Breach of Contract and Its Remedies
2. Guest lecturer materials: [TBD].

Guest Lecturer: [TBD]

In-Class Exercise:

- Peer learning activity
- Brief Q&A on the midterm

Class 4 Freedom of Contract vs. Limitations

Read:

1. LBAC – chapter 14: Sale of Goods and Consumer Contracts.

Optional:

1. LBAC – chapter 8: Formation of a Contract: Capacity to Contract and Legality of Object.
2. Department of Justice Canada (2021). A Report on the Relationship between Restorative Justice and Indigenous Legal Traditions in Canada. https://www.justice.gc.ca/eng/rp-pr/jr/rjilt-jrtja/p5.html.

In-Class Exercise:

- **In-class mid-term test**

Class 5 Employment Contracts (with Guest Lecture)

Read:

1. LBAC – chapter 18: The Contract of Employment
2. Guest lecturer materials: [TBD].
3. Competition Act, RSC 1985 c C-34. **Sections 45(1.1) and (2) only**. https://laws-lois.justice.gc.ca/eng/acts/c-34/section-45.html.

Optional:

1. Parr, S. (2025). Non Compete vs Non Solicitation in Canada: Key Differences Explained. Parr Business Review. https://www.parrbusinesslaw.com/blog/non-compete-vs-non-solicitation-canada.

Guest Lecturer: [TBD]

In-Class Exercise:

- Peer learning activity
- Brief Q&A on final assignment

Class 6 Technology, Confidentiality, and Privacy (with Guest Lecture)

Read:

1. Charkoudian, S. and Tene, O. (2024). Contracting around AI: Reading the fine print. https://iapp.org/news/a/contracting-around-ai-reading-the-fine-print.
2. Office of the Privacy Commissioner of Canada (2024). PIPEDA requirements in brief. https://www.priv.gc.ca/en/privacy-topics/privacy-laws-in-canada/the-personal-information-protection-and-electronic-documents-act-pipeda/pipeda_brief/.
3. Guest lecturer materials: [TBD].

Optional

1. Mangan, D. (2023). Judge sanctions lawyers for brief written by A.I. with fake citations. https://www.cnbc.com/2023/06/22/judge-sanctions-lawyers-whose-ai-written-filing-contained-fake-citations.html.
2. James, M. (1999). E-signatures allow contracts via mouse and modem, not pen and paper. The Baltimore Sun. https://books.google.ca/books?id=6YVGAAAAIBAJ&lpg=PA41&dq=Electronic%20Signature%201999&pg=PA41#v=onepage&q&f=false.

Guest Lecturer: [TBD]

Final assignment due

In-Class Exercise:

- Peer learning activity

Written Assignments/Projects and Exam[s]: Descriptions

Submission instructions: Please submit all assignments on Canvas before the beginning of class. Emailed assignments will not be accepted. Late assignments will not be accepted.

Due Date

Each Class Class Participation

This relates to both class attendance, and how students contribute to class discussions each week. Quality is far more important than quantity. To help prepare for the weekly class lecture and discussion, students are expected to read the assigned readings. Students are also encouraged to do further research into class topics that may be of personal interest, and share relevant outside knowledge.

Due Date

In-Class Max length: N/A
In-Class Value: 10%

Weeks 2, 3, 5, & 6 — Peer Learning Activity

Within small groups, one student each week will be assigned a basic contractual concept (or piece of "legal jargon") that they will be responsible for researching, understanding, and then teaching to their group members.

Afterwards, the course instructor will choose a group for each concept, and that group's chosen representative (who is not the peer teacher that week) will be asked to relay that concept to the class.

In-Class Max length: 5 minute discussions.
In-Class Value: 10%

Week 4 — In-class Midterm

Students will write a 30-minute, closed book test, evaluating their understanding of the course material and readings from the first three weeks of the course. Material from optional readings will not be tested, except to the extent they may have been covered in class.

Max length: 30 minutes.
Value: 40%

Week 6 — Final Assignment: Request for Tender ("RFT")

The course instructor will issue a simulated request for tender, containing product requirements and a draft agreement. Students, representing their simulated businesses, will submit a tender response.

Using information provided in the assignment fact sheet, students will be responsible for drafting their tender, including pricing and proposed comments/revisions to the draft agreement. Applying practical negotiation skills, students will need to balance protecting their business' financial and legal interests, while keeping their tender attractive to the buyer in an effort to "win" the contract.

Max length: See above
Value: 40%

Evaluation of Written Assignments/Projects and Exams

Late assignments are not accepted. A late assignment will result in a zero for that assignment. There is no way to make up for a missed assignment. I do not offer additional assignments or extra work in lieu of

a missed assignment. Given these facts, please pay close attention to deadlines. Please upload all assignments on Canvas.

Calculation of Course Grade

In this class, final course grades will be determined by the following process: Students' final mark will be derived by weighting each grading component according to the proportions described above. Grades will be converted using the following scale:

GRADE	GRADE POINT	PERCENTAGE	DESCRIPTION
A+	9	≥91-100	Exceptional
A	8	≥86-90	Excellent
A-	7	≥80-85	Very Good
B+	6	≥75-79	Good
B	5	≥70-74	Competent
B-	4	≥65-69	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 your student handbook.

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

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

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

Quick Reference: Summary of Classes, Activities and Deliverables

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)	Assignment Due
Class 1 **Class Introduction, The What and Why of Contracts, and Contract Fundamentals I**	Form groups for peer learning activity	1. Where our legal system comes from. 2. LBAC chapter 6.	
Class 2 **Contract Fundamentals II, & Different Types of Agreements**	Peer learning activity	1. LBAC chapter 7. 2. Headnote to: R. (Ont.) v. Ron Engineering, [1981] 1 S.C.R. 111. 3. LinkedIn App End User License Agreement.	
Class 3 **Risks, Remedies, and Practical Negotiations (with Guest Lecture)**	Peer learning activity	1. LBAC chapter 13. 2. Guest lecturer materials.	
Class 4 **Freedom of Contract vs. Limitations**	**Midterm test**	1. LBAC chapter 14.	
Class 5 **Employment Contracts (with Guest Lecture)**	Peer learning activity	1. LBAC chapter 18. 2. Guest lecturer materials. 3. Competition Act, RSC 1985 c C-34. **Sections 45(1.1) and (2) only**.	
Class 6 **Technology, Confidentiality, and Privacy (with Guest Lecture)**	Peer learning activity	1. Contracting around AI: Reading the fine print. 2. PIPEDA requirements in brief. 3. Guest lecturer materials.	**Final RFT assignment**

MEMORANDUM

York University Libraries

To: Joe Yule, Instructor (JD, University of Toronto), MGMT Area, Schulich School of Business

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

Date: March 17, 2025

Subject: Library Statement – MGMT 6010 1.5 Introduction to Business Contracts

Summary

York University Libraries (YUL) is well positioned to support this proposed course which introduces students to the fundamentals of contract law as it relates to business and the people who work in it. The first half of the course deals with essential concepts such as: the elements of a legally binding contract, the various forms that contracts take, and what happens when an agreement breaks down. The second half of course explores the current business practices of contractual negotiations, policies that limit what contracts can do, employment agreements, and the interplay between business, technology, and the law. 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. It also brings attention to collections of interest from connected fields such as law and information technology.

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:

- Commercial law, Contracts, Labor contract, Commercial documents, Technological innovations – Law and legislation, Technology and law, and Negotiation in business etc.

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

The print textbook required for this course is available in the Libraries' collection. It is recommended that the instructor place it on reserve to ensure equitable access for students. Many of the readings are available through links provided by the instructor which are on the free web. It is recommended that the instructor use the Copyright Office's Course Reading List/Syllabus Review Service to ensure that the terms of use for the various materials allow for the content to be used in a course. Based on the librarian's review of class themes and weekly topics, a tailored selection of electronic databases of interest for this course are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings.

Key Business & Corporate Law Databases:

- HeinOnline Law Journal Library
- Nexis Uni
- Proquest Business Databases
- Business Source Complete
- CanLII
- Lexis Advance QuickLaw
- Westlaw Edge Canada
- Bloomberg

Key Technology Publication Databases:

- ACM Digital Library
- IEEE Xplore
- Engineering Village
- Scholars Portal Journals
- JSTOR

Newspaper Databases:

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

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:

- Omni Search Guide
- Business Articles Research Guide
- Step-by-Step Business Database Tutorials
- Information Technology Guide
- Artificial Intelligence Research Guide
- Artificial Intelligence and the Law Research Guide
- Corporate Law Research Guide
- Bloomberg Getting Started 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 and at the Osgoode Hall Law Library Monday to Friday. In addition, students and faculty can book one-hour research consultations with a specialist librarian. For bookings with a law librarian consult this online booking webpage, while appointments with all other specialist librarians can be booked on this Book a Consultation web page.

Accessibility Services

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

Schulich
School of Business
York University

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:
Tech MBA: MBA in Technology Leadership

2. Responsible Unit:
ECON

3. Subject Code (Rubric) and Course Number:
ECON 5111

4. Credit Value:
3.00

5. Long Course Title:
Markets, Firms, and the Global Economy

6. Short Course Title:
Markets, Firms, and the Global Economy

7. Effective Term/Calendar Year:
Fall 2026

8. Language of Instruction:
English

9. Calendar (Short) Course Description:

This course provides managers with an overview of the economic environment within which businesses operate, along with a deep understanding of key analytical tools used by economists to address business, economic, environmental, and social challenges. It introduces fundamental concepts from microeconomics, macroeconomics, environmental economics, and international economics, equipping students with the ability to apply economic reasoning to real-world issues. This is a hands-on course, where students will engage in in-class exercises

and actively apply their knowledge to real-world problems, enhancing their practical understanding of economic concepts.

10. Expanded Course Description:

This course provides managers with an overview of the economic environment within which businesses operate, along with a deep understanding of key analytical tools used by economists to address business, economic, environmental, and social challenges. It introduces fundamental concepts from microeconomics, macroeconomics, environmental economics, and international economics, equipping students with the ability to apply economic reasoning to real-world issues. This is a hands-on course, where students will engage in in-class exercises and actively apply their knowledge to real-world problems, enhancing their practical understanding of economic concepts.

11. Course Learning Outcomes:

Tech MBA students completing this course are expected to have the following learning outcomes:

1. Understand fundamental microeconomics concepts, tools and theories required by a well-educated responsible manager, working for a domestic or international organization in a globalized economy including socially responsible decision making around key issues.
2. Understand basic macroeconomic factors affecting the operating environment of firms and organizations in a domestic and international context.
3. Understand underlying economic incentives and externalities of organizations and implications for managers and stakeholders.
4. Understand potential problems associated with different market structures, the role of government, and their implications for managers and organizations.
5. Be able to apply economic concepts and frameworks to analyze business models and develop strategies for the deployment of organizational resources.
6. Integrate economic environment analysis across disciplines.

2. Rationale:

This course is a core economics course for the Tech MBA: MBA in Technology Leadership

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13. Evaluation:

Assignment/Task	Quantity	% Weight	Total %	Author
In-Class working assignments/cases	Best 5 out of 7	5	25	Individual
Quizzes	2	15	30	Individual
Group Project Slides– Economic News Event Analysis	1	20	20	Group
Presentation	1	10	10	Group
Class participation	Best 7 out of 8	15	15	Individual
			100%	

14. Integrated Courses:

N/A

15. Cross-listed Courses:

N/A

16. Enrolment Notes:

This course is open to Tech MBA students only.

17. Faculty Resources:

Faculty Members: Irene Henriques; Alexander Coutts

Expected frequency: Course is expected to be offered annually.

Faculty resource impact: This course is not expected to impact faculty resources.

18. Physical Resources:

The course requires standard classroom infrastructure, and standard virtual class tools (if remote). As such it does not require any additional resources.

19. Bibliography and Library Statement:

Required:

The Economy 2.0: Microeconomics – Actors, Institutions, and Outcomes
Author: The CORE Econ Team
Free open-access textbook is available online: https://core-econ.org/the-economy/

The macroeconomic material will be handouts prepared by Dr. Irene Henriques.

Articles (many of these readings are available for free online):

Brynjolfsson, E. & Collis A. (2019) How Should We Measure the Digital Economy? **Harvard Business Review**, November 1, 2019. https://hbr.org/2019/11/how-should-we-measure-the-digital-economy.

G20. (2018). Toolkit for Measuring the Digital Economy. Available at https://www.oecd.org/g20/summits/buenos-aires/G20-Toolkit-for-measuring-digital-economy.pdf

Brynjolfsson, E., Rock, D., & Syverson, C. (2019) Artificial Intelligence and the Modern Productivity Paradox: A Clash of Expectations and Statistics. In A. K. Agrawal, J. Gans, & A. Goldfarb (Eds.), The Economics of Artificial Intelligence: An Agenda: 23–57. https://www.nber.org/system/files/working_papers/w24001/w24001.pdf

Acemoglu, D. and Restrepo, P. (2019) The Wrong Kind of AI? Artificial Intelligence and the Future of Labor Demand. National Bureau of Economic Research (NBER) Working Paper 25682. https://www.nber.org/system/files/working_papers/w25682/w25682.pdf

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

20. Instructors and Faculty Coordinator

Initial instructor:
Irene Henriques

Alternative instructors:
Alex Coutts

Course coordinator:
Irene Henriques

21. Specializations

Primary area or specialization:
ECON

Secondary areas or specializations:
N/A

22. Student Contact and Enrolment

Contact hours:
36

Maximum enrolment:
55

Expected enrolment:
55

Evidence for enrolment expectations:
Economic knowledge—both micro and macro—is essential for a Tech MBA program. Microeconomics equips future tech leaders with insights into consumer behavior, pricing strategies, market competition, and resource allocation, all of which are critical for launching and scaling tech products. Macroeconomics complements this by providing a broader perspective on economic trends, inflation, interest rates, and global market forces, enabling strategic decision-making in a rapidly evolving technological landscape. Together, these economic principles empower Tech MBA graduates to drive innovation while maintaining financial stability and long-term growth.

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

This course integrates equity, diversity, inclusion, decolonization, and Indigenization (EDIDI) by critically examining the historical and structural factors shaping economic disparities. It explores how colonial histories, trade policies, labor markets, and technological change have influenced global inequality, emphasizing the role of capitalism and industrialization in shaping economic opportunities. The course includes diverse perspectives in its readings and discussions, incorporating materials that address economic marginalization, environmental justice, and the impact of globalization on developing economies. By analyzing economic systems through both mainstream and

critical lenses, students are encouraged to think beyond traditional models and consider alternative approaches to inclusive and sustainable economic growth.

The course delivery fosters an inclusive learning environment where diverse perspectives are valued and respected. Class discussions, in-class exercises, and group presentations ensure that all students have the opportunity to engage with economic issues from multiple viewpoints, including those of historically marginalized communities. By incorporating real-world applications and policy discussions, the course encourages students to critically assess economic frameworks and explore solutions that promote equity and inclusion. Through this approach, students develop a deeper understanding of the systemic barriers within economic systems and the importance of policies that support fair and sustainable development.

24. Human Participants Research

N/A

25. Conditions for Approval

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

a) Provide a convincing case for the proposed course.

This course is a core course in the new Tech MBA program

Originator:

	March 3, 2025
Signature	Date
Irene Henriques	Economics - SSB
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.

Schulich
School of Business
York University

Perry Sadorsky *Economics Area*

Alex Coutts *Economics Area*

Atipol Bhanich Supapol *Economics Area*

Pauline Shum-Nolan *Finance Area*

Linda Thorne *Accounting Area*

Ela Veresiu *Marketing Area*

Approvals

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

_____ March 3, 2025
Signature Date

_____ Economics - SSB Irene Henriques
Name of Coordinator or Director Area or Specialization

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

_____
Signature Date

_____
Name of Program Director Program

Schulich
School of Business
York University

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

Kevin Tasa
Signature

November 20, 2025
Date

Kevin Tasa
Name of Committee Chair

Master Programs Committee
Committee

SB/ECON 5111 A 3.00: Markets, Firms and the Global Economy

Markets, Firms and the Global Economy

Course Outline
Fall 2026

Date: TBA
Location: TBA

Instructor
Dr. Irene Henriques
N205 D, Seymour Schulich Building
416-736-5068
ihenriques@schulich.yorku.ca
Office hours: By appointment

Assistant
Domenica Lam
N205B, Seymour Schulich Building
(416) 736-5068
dlam@schulich.yorku.ca

Irene Henriques is Professor of Sustainability and Economics and Area Coordinator of Economics at the Schulich School of Business, York University in Toronto, section editor at the *Journal of Business Ethics*, Deputy Editor, *Organization and Environment* and former Co-Editor of *Business & Society*. She serves as representative at large to the Board of Governors for the Academy of Management, the largest professional organization in the field of management with over 18,000 members.

Brief Description

This course provides managers with an overview of the economic environment within which businesses operate, along with a deep understanding of key analytical tools used by economists to address business, economic, environmental, and social challenges. It introduces fundamental concepts from microeconomics, macroeconomics, environmental economics, and international economics, equipping students with the ability to apply economic reasoning to real-world issues. This is a hands-on course, where students will engage in in-class exercises and actively apply their knowledge to real-world problems, enhancing their practical understanding of economic concepts.

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Course Learning Outcomes

Tech MBA students completing this course are expected to have the following learning outcomes:

1. Understand fundamental microeconomics concepts, tools and theories required by a well-educated responsible manager, working for a domestic or international organization in a globalized economy including socially responsible decision making around key issues.
2. Understand basic macroeconomic factors affecting the operating environment of firms and organizations in a domestic and international context.
3. Understand underlying economic incentives and externalities of organizations and implications for managers and stakeholders.
4. Understand potential problems associated with different market structures, the role of government, and their implications for managers and organizations.
5. Be able to apply economic concepts and frameworks to analyze business models and develop strategies for the deployment of organizational resources.
6. Integrate economic environment analysis across disciplines.

Deliverables at a Glance

You are expected to follow the course materials and readings. Assignments are to be completed individually. Participation is encouraged in-class, as well as in structured offline discussions.

Assignment/Task	Quantity	% Weight	Total %	Author
In-Class working assignments/cases	Best 5 out of 7	5	25	Individual
Quizzes	2	15	30	Individual
Group Project Slides– Economic News Event Analysis	1	20	20	Group
Presentation	1	10	10	Group
Class participation	Best 7 out of 8	15	15	Individual
			100%	

Course Material

Every week, you should access the class Canvas page and access the Class-by-Class Syllabus for readings and locations (See pp. 4-7)

Required reading for this course includes the following book. It is available to download for free:

The Economy 2.0: Microeconomics – Actors, Institutions, and Outcomes
Author: The CORE Econ Team
Free open-access textbook is available online: https://core-econ.org/the-economy/

The macroeconomics course topics and readings will be provided by Professor Henriques and will be available in Canvas.

To effectively relate the course materials to the real world, students are encouraged to read the business section of the **Globe and Mail** and/or the **National Post**. Publications such as the **Economist**, the **Wall Street Journal**, and the **Financial Times** London are also recommended. Also recommended are the project syndicate and the Peterson institute for international economics. **IMF**, **OECD**, **World Bank**, central bank and national statistical agency publications [example, data and analysis] can be useful in your research.

Canvas contains general information for Schulich students and information and materials specific to this course. Check it frequently.

Student Preparation for Class and Class Participation: Expectations

***Preparation*.**
It is expected that students have read the corresponding readings before each class. When the class involves Class Exercises these will be completed in class, and students should arrive to class ready to contribute.

***Class Participation (Best 7 out of 8: 15%)*.**
Class participation is a key part of the learning experience. Preparation for the class and involvement in class discussion are essential to learning. Class contribution will be evaluated in terms of attendance in lectures, and the evidence of sound reasoning and positive contribution to class discussion polls. The best 7 of 8 class participation will be equally weighted in the 15%. There are no "make-up" participation grades.

Poll Everywhere: We will be using Poll Everywhere to provide additional ways for students to engage with the course materials and with the topics we discuss in class and to take attendance. Please familiarize yourself with the Poll Everywhere app – there will be no acceptable excuses for not being able to participate in PollEverywhere course activities.

Quizzes (30%)
The quizzes will be held in-class using the Canvas platform. The exam will consist of multiple-choice questions. Further details will be provided by instructor.

Quiz 1: Microeconomics – 15%
Quiz 2: Macroeconomics – 15%

In-Class working assignments/cases (Best 5 out of 7: 25%)
Seven classes will have in-class working assignments or cases. The first half of the class will discuss the main concepts followed by an in-class working assignment where students will apply their knowledge. The best 5 of 7 assessments will be equally weighted in the 25%. There are no "make-up" assessments or extensions.

Group Project Proposal, Slides and Presentation (30%)

Group project proposal – must be submitted by the end of reading break to receive instructor feedback – 0%. Presentation slides 20% and presentation 10%.

Class-by-Class Syllabus

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

Note: If any changes in this schedule become necessary, notifications will be posted on the course Canvas account, and when changes need to be announced between classes, an email will be sent to students' email accounts, notifying them of any change.

Week 1

Prosperity, Inequality and Planetary Limits

In this class, we explore the historical and modern drivers of economic growth, inequality, and environmental challenges. We examine how industrialization and capitalism transformed living standards while creating disparities across countries, especially in post-colonial societies. We analyze the environmental costs of economic expansion, including climate change and biodiversity loss. We discuss the role of technology, policy, and institutions in balancing growth with sustainability. We critically assess how to achieve prosperity while respecting planetary limits.

Read:
Microeconomics, CORE: Chapter 1

Week 2

Technology and Incentives

In this class, we explore key economic models that explain decision-making, specialization, and technological choices. We examine concepts like opportunity cost, economic rents, and incentives, including how innovation rents and relative prices shape economic behavior. We analyze the gains from specialization and trade using comparative advantage and the division of labor. We discuss production functions, factor inputs, and how firms choose between technologies based on isocost lines and relative prices. We critically assess the principles of economic modeling, including simplification, equilibrium, and the role of evidence in testing economic theories.

In-class exercise

Read:

Microeconomics, CORE: Chapter 2

Week 3

Strategic Interactions and Social Dilemmas

In this class, we explore how game theory helps us understand strategic interactions and social dilemmas, particularly in the context of climate change. We examine key concepts like Nash equilibrium, Pareto efficiency, and how individual self-interest can lead to both positive and negative outcomes for society. We analyze different types of games, including the prisoners' dilemma, the invisible hand game, and the ultimatum game, to understand how incentives, fairness, and social preferences shape decision-making. We discuss how changing the "rules of the game," such as introducing punishments for free-riders, can influence behavior and cooperation. We critically assess how these models apply to real-world challenges, including collective action problems like climate change.

In-class exercise

Read:
Microeconomics, CORE: Chapter 4

Week 4

The Firm and its Customers

In this class, we explore how firms set prices and output levels to maximize profits while considering demand, costs, and competition. We examine the role of fixed and variable costs, economies of scale, and product differentiation in shaping market outcomes. We analyze how price elasticity affects a firm's pricing power and the distribution of gains from trade between consumers and producers. We discuss the impact of market power on efficiency, including deadweight loss, and the strategic behavior of firms with few competitors. Finally, we assess how competition policy is used to regulate market power and improve societal outcomes.

In-class exercise

Read:

Microeconomics, CORE: Chapter 7

Week 5

Supply & Demand

In this class, we explore how prices convey information about demand and scarcity, shaping market interactions between buyers and sellers. We examine the supply and demand model, competitive equilibrium, and the conditions under which all participants are price-takers. We analyze how markets adjust to economic shocks and how price changes eliminate excess supply or demand. We discuss how government interventions, such as taxes and price controls, impact equilibrium, efficiency, and market outcomes. Finally, we assess the real-world relevance of competitive market models and their limitations.

In-class exercise

Read:

Microeconomics, CORE: Chapter 8

Week 6

Quiz 1

Week 7

Measuring the Macroeconomy

In this class, we explore how economists measure the overall performance of an economy using key macroeconomic indicators. We examine concepts like GDP, inflation, and unemployment to assess economic growth, price stability, and labor market conditions. We analyze how these measures capture economic activity, their limitations, and their impact on policy decisions. We discuss the role of national income accounting, productivity, and business cycles in understanding economic fluctuations. Finally, we assess how macroeconomic data informs decisions by governments, businesses, and international organizations.

In-class exercise

Read:

Henriques, Irene (2025) *The Macroeconomy*, Handout.

Brynjolfsson, E. & Collis, A. (2019) How Should We Measure the Digital Economy? *Harvard Business Review*, November 1, 2019.

https://www.imf.org/en/Publications/fintech-notes/Issues/2019/07/12/The-Rise-of-Digital-Money-47097

G20. (2018). Toolkit for Measuring the Digital Economy. Available at https://www.oecd.org/g20/summits/buenos-aires/G20-Toolkit-for-measuring-digital-economy.pdf

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Week 8

Labour and the Macroeconomy

In this class, we explore the role of labour markets in shaping macroeconomic outcomes, including employment, wages, and productivity. We examine key indicators such as unemployment rates, labor force participation, and wage growth to assess economic performance. We analyze how business cycles, technological change, and government policies impact job creation and income distribution. We discuss the balance between labor supply and demand, as well as the effects of globalization and automation on employment. Finally, we assess policies aimed at improving labor market efficiency, reducing inequality, and supporting economic stability.

In-class exercise

Read:

Henriques, Irene (2024) Labour and the Macroeconomy, Handout.

Brynjolfsson, E., Rock, D., & Syverson, C. (2019) Artificial Intelligence and the Modern Productivity Paradox: A Clash of Expectations and Statistics. In A. K. Agrawal, J. Gans, & A. Goldfarb (Eds.), The Economics of Artificial Intelligence: An Agenda: 23–57. https://www.nber.org/system/files/working_papers/w24001/w24001.pdf

Acemoglu, D. and Restrepo, P. (2019) The Wrong Kind of AI? Artificial Intelligence and the Future of Labor Demand. National Bureau of Economic Research (NBER) Working Paper 25682. https://www.nber.org/system/files/working_papers/w25682/w25682.pdf

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Week 9 Trade, FDI & Exchange Rates

In this class, we explore how international trade, foreign direct investment (FDI), and exchange rates influence economic growth and global interconnectedness. We examine the benefits of trade based on comparative advantage, the role of multinational corporations in cross-border investment, and the impact of trade policies. We analyze how exchange rate fluctuations affect trade balances, inflation, and financial stability. We discuss the effects of trade agreements, tariffs, and currency regimes on economic performance. Finally, we assess the challenges and opportunities presented by globalization in shaping national and international economies.

In-class exercise

Read:

Henriques, Irene (2025) Trade & Exchange Rates, Handout.

Week 10 Quiz #2

Week 11 Group Presentations

Written Assignments/Projects and Exam[s]: Descriptions

All written submissions must be typed in a 12-point font such as Times New Roman, 1.5 spacing, with standard margins in Microsoft Word or similar.

In-class assignments will be completed on Canvas. They will involve multiple choice and/or short-answer questions directly pertaining to the course material. Students are strongly encouraged to engage with the material early in preparation.

Due Date	
Week 2	In-class exercise
Week 3	In-class exercise
Week 4	In-class exercise
Week 5	In-class exercise
Week 6	Quiz 1
Week 7	In-class exercise
Week 8	In-class exercise
Week 9	In-class exercise
Week 10	Quiz 2
Week 11	<u>Group Presentation</u> Live group presentation Presentation time: 10 Minutes + 5 minutes for Q&A

Evaluation of Written Assignments/Projects and Exams

Group Assignment: Economic Event Analysis

In this assignment, students will work in groups of 3–4 to analyze a current economic event reported in the news. Each group must select a recent article from a reputable source (e.g., *The Globe and Mail*, *The Economist*, *Financial Times*) that discusses an economic issue such as unemployment, inflation, trade policy, or market disruptions. The group will critically assess the article by:

- Collecting relevant data to verify the claims made in the article.
- Evaluating whether the article's analysis is accurate and comprehensive.
- Identifying any gaps in the article's argument and determining what additional information would strengthen the analysis.

Each group will submit a **project proposal before Reading Week** for feedback (500 words including the current economic event you will be analyzing and a preliminary list of research references). The final deliverable will be a **slide presentation** [10 slides maximum plus a cover page, exec summary, references, and optional appendices (5 slide maximum)]. which must be submitted to the instructor and presented to the class.

Rubric for slide deck report: Compelling Story (25%); Creativity & Originality (25%); Analytical & Technical Competence (25%); Professionalism (25%)

Rubric for group presentation: Compelling Presentation (25%); Creativity & Originality (25%); Class Engagement & Interest (25%); Professionalism (25%)

This project aims to develop students' ability to apply economic theories to real-world issues, critically assess media reports, and communicate their findings effectively.

Format of Slides and Presentation

Each group will deliver a **10-minute presentation** summarizing their key findings, followed by a **5-minute Q&A session**. Presentations will be evaluated on both **content and delivery**, as well as **active participation** in discussions—both during your own presentation and those of your peers.

Attendance at all presentations is mandatory. Failure to attend and engage in your colleagues' presentations will result in a lower grade. **Presentations will take place during the final week of class.**

Calculation of Course Grade

In this class, final course grades will be determined by the following process: to calculate your final course letter grade I will sum up the product of the percentage mark assigned for each deliverable (class participation/assignments/ group project/final exam). The resultant final percentage will be converted to letter grade according to the following scale:

Grade	Grade Point/ Index Value	Percentage Points	Description
A+	9	90-100	Exceptional
A	8	85-89	Excellent
A-	7	80-84	Very Good
B+	6	75-79	Good
B	5	70-74	Competent
B-	4	65-69	Fairly Competent
C+	3	60-64	Passing
C	2	55-59	Barely Passing
C-	1	50-54	Marginally Failing
F	0	0-49	Failing

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

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

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

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

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

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

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

Exams (Absence from)
Final. Within 24 hours of missing a final examination, students must contact the Director of Student Services, at (416) 736-5060 and must also contact their course instructor. Formal, original documentation regarding the reason for missing the exam must be submitted to the Director of Student Services within 48 hours of missing the final exam. Students who miss a final exam due to illness must have their doctor complete an "Attending Physician's Statement." For a copy of this document, visit:
http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf

Quick Reference: Summary of Classes, Activities and Deliverables

The following list of lecture topics and readings indicate the material to be read, reviewed and/or prepared for the various class sessions. If any changes in this schedule become necessary, notifications will be posted on the course CANVAS.

Class Session Date	Topic	Assigned Readings	Deliverables
Class 1	Prosperity, Inequality and Planetary Limits	Microeconomics, CORE: Chapter 1	-Participation
Class 2	Technology and Incentives	Microeconomics, CORE: Chapter 2	-Participation -In-class exercise
Class 3	Strategic Interactions and Social Dilemmas	Microeconomics, CORE: Chapter 4	-Participation -In-class exercise
Class 4	The Firm and its Customers	Microeconomics, CORE: Chapter 7	-Participation -In-class exercise
Class 5	Supply & Demand	Microeconomics, CORE: Chapter 8	-Participation -In-class exercise
Class 6	Quiz 1		Quiz 1
Class 7	Measuring the Macroeconomy	-Henriques, Irene (2025) *The Macroeconomy*, Handout. -Brynjolfsson, E. & Collis, A. (2019) How Should We Measure the Digital Economy? *Harvard Business Review*, November 1, 2019. https://www.imf.org/en/Publications/fintech-notes/Issues/2019/07/12/The-Rise-of-Digital-Money-47097 -G20. (2018). Toolkit for Measuring the Digital Economy. Available at https://www.oecd.org/g20/summits/buenos-aires/G20-Toolkit-for-measuring-digital-economy.pdf	-Participation -In-class exercise
Class 8	Labour and the Macroeconomy	-Henriques, Irene (2024) *Labour and the Macroeconomy*, Handout.	-Participation -In-class exercise

Class Session Date	Topic	Assigned Readings	Deliverables
		-Brynjolfsson, E., Rock, D., & Syverson, C. (2019) Artificial Intelligence and the Modern Productivity Paradox: A Clash of Expectations and Statistics. In A. K. Agrawal, J. Gans, & A. Goldfarb (Eds.), ***The Economics of Artificial Intelligence: An Agenda***: 23–57. https://www.nber.org/system/files/working_papers/w24001/w24001.pdf -Acemoglu, D. and Restrepo, P. (2019) The Wrong Kind of AI? Artificial Intelligence and the Future of Labor Demand. National Bureau of Economic Research (NBER) Working Paper 25682. https://www.nber.org/system/files/working_papers/w25682/w25682.pdf	
Class 9	Trade, FDI & Exchange Rates	Henriques, Irene (2025) Trade & Exchange Rates, Handout.	-Participation -In-class exercise
Class 10	Quiz 2		Quiz 2
Class 11	Presentations		Group Presentation

MEMORANDUM

York University Libraries

To: Irene Henriques

From: Aaron Lupton, Content and Licensing Librarian, Content Development and Analysis

Date: March 5, 2025

Subject: Library Statement of Support – ECON 5111: Markets, Firms, and the Global Economy

Summary

York University Libraries (YUL) are well positioned to support the proposed course. Faculty and students can make use of an array of library resources and services to meet their research and learning needs. This statement highlights offerings related to the major themes of the course. It also brings attention to collections of interest from connected fields such as Information Technology, Business and Economics.

Collections

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

- Environmental and social challenges, microeconomics, macroeconomics, environmental economics, and international economics, etc.

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

The Omni single-search interface provides students with access to a wide range of materials, including books, book chapters, articles, dissertations, streaming media, etc. Library users may also request items from partner libraries through Omni. A selection of electronic collections of particular interest are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings.

eBook Platforms:

- SpringerLink
- Cambridge Core
- Taylor & Francis eBooks
- ProQuest eBook Central
- Scholars Portal Books

Subject Databases:

- Econlit
- BusinessSource Complete
- ProQuest Business
- Scholars Portal Journals
- JSTOR
- Web of Science

Canadian Content:

- Canadian Periodicals Index Quarterly (CPI.Q)
- Érudit
- Canadian Major Dailies
- Canadian Business and Current Affairs
- Curio.ca
- Canadian Research Index
- Early Canadiana Online

Reference Resources:

- Britannica Online
- Oxford Bibliographies Online
- Oxford Reference Online
- Oxford Very Short introductions
- Sage Research Methods

Newspaper/ Magazine Collections:

- Press Reader
- Factiva
- Nexis Uni

Streaming Media:

- Kanopy
- Sage Video
- Films on Demand

Services

Library Instruction

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

Research Guides of Interest:

- Economics/Business Economics Guide
- Economics Guide

Research Help

Online research assistance is available in both French and English via chat, text, and email. In addition, students and faculty can book one-hour research consultations with a specialist librarian. The Libraries also offer a virtual drop-in service hosted through Zoom for help in real-time.

Accessibility Services

Located on the first floor of the Scott Library (Keele Campus), Library Accessibility Services (LAS) provides alternative content formats, as well as adaptive technologies and spaces. With a referral, York University faculty and students can request transcription services or reserve an accessibility lab workstation.

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: Tech MBA

2. Responsible Unit: MKTG

3. Subject Code (Rubric) and Course Number: MKTG 5210

4. Credit Value: 3.00

5. Long Course Title: Product Management

6. Short Course Title: Product Management

7. Effective Term/Calendar Year: Fall 2026

8. Language of Instruction: English

9. Calendar (Short) Course Description:
In this course you will learn the skills to strategically drive the development, launch, and improvement of a company's products. The course covers the product lifecycle, form brainstorming and customer research to strategic planning and team leadership. In addition, you will learn the responsibilities, skills, and knowledge needed to drive product management success.
Prerequisites/Corequisites/Course Exclusions: None/None/None

10. Expanded Course Description:
This course will equip you with the essential skills to strategically drive the development, launch, and improvement of a company's products. You will learn to navigate the entire product lifecycle, from initial brainstorming and customer research to strategic planning and team leadership.

Course Aims and Objectives

The primary aims of this course are to:

1. Teach fundamental product management skills
2. Develop your ability to assess customer pain points and design compelling product visions
3. Enhance your cross-functional collaboration skills
4. Improve your analytical capabilities for data-driven decision making

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

- Empathize with customers and identify their needs
- Build and communicate product visions and roadmaps
- Leverage innovative technologies, including generative AI, for product success
- Utilize key performance indicators (KPIs) to guide the product management process
- Prepare and present compelling business cases for product development
- Apply agile project management principles to product development

Course Materials and Topics

The course will cover a wide range of topics and materials, including:

1. **Product Management Fundamentals**
    - Definition and importance of product management
    - Roles and responsibilities of a product manager
2. **Customer Discovery and Research**
    - Techniques for identifying customer pain points
    - Conducting user and market research
3. **Product Strategy and Vision**
    - Creating product visions and roadmaps
    - Setting goals and objectives
4. **Product Development Process**
    - Agile methodologies and principles
    - Prototyping and testing techniques
5. **Go-to-Market Strategies**
    - Inbound and outbound product marketing strategies
    - Launch planning and execution
6. **Data Analytics and Metrics**
    - Utilizing product analytics for decision-making
    - Measuring product success and iterating
7. **Cross-functional Collaboration**
    - Working with engineering, UX, and leadership teams
    - Stakeholder management and influence
8. **Emerging Trends in Product Management**
    - Leveraging AI and other innovative technologies
    - Future trends shaping the field

The course will combine theoretical concepts with practical exercises, guest lectures, case studies, and hands-on projects to provide a comprehensive learning experience in product management.

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11. Course Learning Outcomes:

1. Mastering Product Discovery
Learn how to identify and validate customer problems through continuous product discovery, ensuring solutions address real user needs effectively.

2. Building Empowered Product Teams
Understand how to structure and lead cross-functional teams that are outcome-focused, autonomous, and capable of solving problems creatively.

3. Creating a Strong Product Vision and Strategy
Develop skills to craft a clear, inspiring product vision and align it with strategic objectives that guide teams toward long-term success.

4. Outcome-Driven Roadmaps
Shift focus from feature-based roadmaps to outcome-driven plans, empowering teams to prioritize objectives over tasks for greater impact.

5. Fostering a Product-Oriented Culture
Cultivate a culture of innovation, collaboration, and continuous learning within organizations to consistently deliver products customers love.

12. Rationale:

This is a required course in the Tech MBA Program.

13. Evaluation:

BREAKDOWN OF COURSE REQUIREMENTS

ASSIGNMENT/TASK	DUE DATES	QUANTITY	% WEIGHT	TOTAL %	AUTHOR
Mid-Term Exam (Take Home)	Class 6	1	30%	30%	Individual
Team Presentation (SIX teams with 7 students per team)	Class 11	1	30%	60%	Team
Final Exam (Take Home)	Exam Period	1	40%	100%	Individual

WRITTEN ASSIGNMENTS/PROJECTS AND EXAM[S]: DESCRIPTIONS

Due Date
Class 6 <u>Mid-Term Exam (Take Home)</u>

Due Date

The mid-term exam will be posted on canvas at the beginning of Class 6 and you will be required to submit your answer on canvas at the end of Class 6 (3 hours).
Max length: 3 hours (duration of Class 6)
Value: 30%

Class 11 — Team Assignment

Your team will (i) DESCRIBE an existing product, (ii) ASSESS its effectiveness using the concepts and tools discussed in the course, and (iii) RECOMMEND changes to the product to improve its effectiveness.
Max length: Team of 7 students will work on a particular product. The team will do a 20 minute presentation in class that covers all 3 sections (i.e., DESCRIBE, ASSESS, and RECOMMEND)
Value: 30%

During Examination Period — Final Exam (Take Home)

The final exam will be posted on canvas at the beginning of scheduled date/time for the final exam and you will be required to submit your answer on canvas at the end of the stipulated time.
Max length: 3 hours (during the examination period)
Value: 40%

CALCULATION OF COURSE GRADES

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

GRADE	GRADE POINT	PERCENTAGE	DESCRIPTION
A+	9	≥91-100	Exceptional
A	8	≥86-90	Excellent
A-	7	≥80-85	Very Good
B+	6	≥75-79	Good
B	5	≥70-74	Competent
B-	4	≥65-69	Marginally Competent
C+	3	≥60-64	Passing
C	2	≥55-59	Barely Passing
C-	1	≥50-54	Marginal Pass
F	0	< 50%	Failed

14. Integrated Courses:

This is required course in the Tech MBA Program.

15. Cross-listed Courses:

This course will not be cross-listed with any other program.

16. Enrolment Notes:

This is a required course for the Tech MBA program. In instances where there is additional capacity, the course will be made available to students in the MBA Program. Students in the MBA Program can take this as an elective course upon approval from the MBA Program Director.

17. Faculty Resources:

The course will be taught annually. Full-time Faculty members in the marketing area that are qualified to teach this course include: Ashwin Joshi, Ela Veresiu, Grant Packard.

18. Physical Resources:

The course will be taught in an existing Schulich classroom.

19. Bibliography and Library Statement:

COURSE MATERIALS

AUTHOR	TITLE	PURCHASE LINK	PRICE
Alan Klement	When Coffee and Kale Compete: Become great at making products people will buy	https://www.amazon.ca/When-Coffee-Kale-Compete-products-ebook/dp/B07C7HH662	$15
Richard Banfield, Martin Eriksson, and Nate Walkingshaw (referred to in text as Banfield et al.)	Product Leadership: How Top Product Managers Launch Awesome Products and Build Successful Teams	https://www.amazon.ca/Product-Leadership-Managers-Products-Successful/dp/1491960604	$53
Marty Cagan	INSPIRED: How to Create Tech Products Customers Love	https://www.amazon.ca/INSPIRED-Create-Tech-Products-Customers/dp/1119387507	$35

Readings for Class 10

https://www.tryexponent.com/blog/top-product-manager-interview-questions
https://www.coursera.org/articles/product-manager-interview-questions
https://productschool.com/blog/job-search/the-ultimate-list-product-manager-interview-questions
https://www.youtube.com/watch?v=wVMDUbsZCHs

Statement from University Librarian Certifying Adequate Library Resources to Support the Course: Attached

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

20. Instructors and Faculty Coordinator

Initial instructor: Ashwin Joshi

Alternative instructors: Full-time faculty: Ela Veresiu; Grant Packard

Course coordinator: Ashwin Joshi

21. Specializations

Primary area or specialization: MKTG

Secondary areas or specializations: None

22. Student Contact and Enrolment

Contact hours: 33 hours

Maximum enrolment: Core Course = 55

Expected enrolment: 50

Evidence for enrolment expectations: This is a required course in the Tech MBA. Enrollment in the Tech MBA is showing steady growth.

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

a. *The lecture in Class 11 will focus particularly on issues relating to DEDI as they pertain to product management.*

24. **Human Participants Research:** N/A

25. Conditions for Approval

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

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

Specify the course or courses being deleted.

b) Provide a convincing case for the proposed course.
State the reason the program needs this new course and provide evidence that the Area has no elective with student enrolments low enough to warrant deletion. Approval from the ADA will be required.

Originator:

Signature	Date
Ashwin Joshi	MKTG
Name	Area or Specialization

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

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

NAME OF FACULTY MEMBER	AREA
Eileen Fischer	MKTG
Theo Noseworthy	MKTG
David Rice	MKTG
Grant Packard	MKTG
Luke Zhu	ORGS
Ruodan Shao	ORGS
Markus Biehl	OMIS

Approvals

Area or Specialization:

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York University

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.

Ela Veresiu	February 21, 2025
Signature	Date
Ela Veresiu	MKTG
Name of Coordinator or Director	Area or Specialization

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

Murat Kristal	February 21,2025
Signature	Date
Murat Kristal	Tech MBA
Name of Program Director	Program

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

Kevin Tasa	November 20, 2025
Signature	Date
Kevin Tasa	Master Programs Committee
Name of Committee Chair	Committee

MKTG 5210 K 3.0: PRODUCT MANAGEMENT

COURSE OUTLINE

Class Logistics
Dates: Sept. 18th to October 12th, 2023
Class Time: 10am to 1pm; (on presentation days: 10am to 5.10pm)
Office Hours: ANYTIME by appointment

Instructor Contact Information
Name: Ashwin W. Joshi, Ph.D.
Email: ajoshi@yorku.ca
Whatsapp: +1-647-409-7302

ABOUT THE INSTRUCTOR

Ashwin W. Joshi is Associate Professor of Marketing and Associate Dean Programs at the Schulich School of Business. Ashwin began his teaching career in 1993. He joined Schulich in 1999 and since then has taught across the BBA, MBA, EMBA, and Ph.D. Programs. Additionally, he has delivered programs for Executives around the world in areas such as marketing strategy, new product development, and analytical and presentation skills.

BRIEF DESCRIPTION

In this course you will learn the skills to strategically drive the development, launch, and improvement of a company's products. The course covers the product lifecycle, form brainstorming and customer research to strategic planning and team leadership. In addition, you will learn the responsibilities, skills, and knowledge needed to drive product management success.

Prerequisites/Corequisites/Course Exclusions: None/None/None

EXPANDED DESCRIPTION

This course will equip you with the essential skills to strategically drive the development, launch, and improvement of a company's products. You will learn to navigate the entire product lifecycle, from initial brainstorming and customer research to strategic planning and team leadership.

Course Aims and Objectives

The primary aims of this course are to:

1. Teach fundamental product management skills
2. Develop your ability to assess customer pain points and design compelling product visions

3. Enhance your cross-functional collaboration skills
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    - Agile methodologies and principles
    - Prototyping and testing techniques
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    - Inbound and outbound product marketing strategies
    - Launch planning and execution
6. **Data Analytics and Metrics**
    - Utilizing product analytics for decision-making
    - Measuring product success and iterating
7. **Cross-functional Collaboration**
    - Working with engineering, UX, and leadership teams
    - Stakeholder management and influence
8. **Emerging Trends in Product Management**
    - Leveraging AI and other innovative technologies
    - Future trends shaping the field

The course will combine theoretical concepts with practical exercises, guest lectures, case studies, and hands-on projects to provide a comprehensive learning experience in product management.

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COURSE LEARNING OUTCOMES

1. Mastering Product Discovery
Learn how to identify and validate customer problems through continuous product discovery, ensuring solutions address real user needs effectively.

2. Building Empowered Product Teams
Understand how to structure and lead cross-functional teams that are outcome-focused, autonomous, and capable of solving problems creatively.

3. Creating a Strong Product Vision and Strategy
Develop skills to craft a clear, inspiring product vision and align it with strategic objectives that guide teams toward long-term success.

4. Outcome-Driven Roadmaps
Shift focus from feature-based roadmaps to outcome-driven plans, empowering teams to prioritize objectives over tasks for greater impact.

5. Fostering a Product-Oriented Culture
Cultivate a culture of innovation, collaboration, and continuous learning within organizations to consistently deliver products customers love.

DELIVERABLES AT A GLANCE

ASSIGNMENT/TASK	DUE DATES	QUANTITY	% WEIGHT	TOTAL %	AUTHOR
Mid-Term Exam (Take Home)	Class 6	1	30%	30%	Individual
Team Presentation (SIX teams with 7 students per team)	Class 11	1	30%	60%	Team
Final Exam (Take Home)	Exam Period	1	40%	100%	Individual

For details, see "Written Assignments/Projects and Exam[s]: Descriptions" (p. <XX>) and "Evaluation …" (p. <XX>).[EV1]

COURSE MATERIALS

AUTHOR	TITLE	PURCHASE LINK	PRICE

Alan Klement (referred to in text as Klement)	When Coffee and Kale Compete: Become great at making products people will buy	https://www.amazon.ca/When-Coffee-Kale-Compete-products-ebook/dp/B07C7HH662	$15
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Readings for Class 10
https://www.tryexponent.com/blog/top-product-manager-interview-questions
https://www.coursera.org/articles/product-manager-interview-questions
https://productschool.com/blog/job-search/the-ultimate-list-product-manager-interview-questions
https://www.youtube.com/watch?v=wVMDUbsZCHs

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

You are encouraged to take an active part in the class discussions by providing thoughtful, constructive, worthwhile comments, questions and debate. Oral communication skills are a must for professionals, so meaningful classroom contribution is expected.

Expectations:

I consider preparing for class, and participating in the exploration of ideas during class, to be a normal, expected part of life as a Schulich graduate student.

CLASS-BY-CLASS SYLLABUS

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

> Note: If any changes in this schedule become necessary, notifications will be posted on the course CMD, and when changes need to be announced between classes, an email will be sent to students' Lotus Notes email accounts, notifying them of the change.

Class 1
Date:
TBA

Session 1: Introduction to Product Management
Topic: The WHY, WHAT, and WHO of Product Management

- **In-Class Activity:** Interactive discussion on the importance of product management (potential guest speaker)
- **Reading:** Banfield et al. – Part 1
- **Written Preparation:** Reflection on a successful or failed product and the role of product management

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Class 2
Date:
TBA

Session 2: Understanding Stakeholders and Users
Topic: Defining the Target Audience and Stakeholder Collaboration

- **In-Class Case:** Analyze product discovery case studies
- **Reading:** Cagan – Part 1 and Part 2
- **Exercise:** Map out user personas and key stakeholders for a sample product

---

Class 3
Date:
TBA

Session 3: Jobs to be Done Theory – Part 1
Topic: Product Development through the "Jobs to be Done" Framework

- **In-Class Case:** Group exercise on identifying customer "jobs"
- **Reading:** Klement – Chapters 1 to 8

Class 4
Date:
TBA

Session 4: Jobs to be Done Theory – Part 2
Topic: Applying the "Jobs to be Done" Framework in Practice

- **In-Class Activity:** Workshop on refining product ideas based on customer needs
- **Reading:** Klement – Chapters 9 to 16

Class 5
Date:
TBA

Session 5: Product Development and Road-mapping
Topic: Practical Approaches to Product Development (Guest Lecture)

- **In-Class Case:** Road-mapping exercise based on a product scenario
- **Reading:** Cagan – Part 3

Class 6
Date:
TBA

Session 6: Mid-Term Exam (30%) – Take Home (during class time)

Class 7
Date:
TBA

Session 7: Process Management in Product Development
Topic: Managing Product Development Processes

- **In-Class Case:** Analyze product development success stories (e.g., Spotify's agile model)
- **Reading:** Cagan – Part 4

Class 8
Date:
TBA

Session 8: Product Development Metrics and KPIs
Topic: Measuring Product Success (Guest Lecture)

- **In-Class Exercise:** Define success metrics for a product case study
- **Reading:** Cagan – Part 4

Class 9

Session 9: Ethics and Managing the Product Ecosystem

Date: TBA

Topic: Ethical Considerations and Ecosystem Management with a particular focus on DEDI

- **In-Class Case:** Discuss ethical dilemmas in product management and how to advance DEDI in this domain
- **Reading:** Banfield et al. – Part 3

Class 10
Date: TBA

Session 10: Preparing for Product Management Careers

Topic: Career Preparation and Industry Trends

- **In-Class Activity:** Mock interviews and resume reviews
- **Resources:** Exponent.com; Coursera.org; Productschool.com; YouTube videos
- **Reading:**
  - https://www.tryexponent.com/blog/top-product-manager-interview-questions
  - https://www.coursera.org/articles/product-manager-interview-questions
  - https://productschool.com/blog/job-search/the-ultimate-list-product-manager-interview-questions
  - https://www.youtube.com/watch?v=wVMDUbsZCHs

Class 11
Date: TBA

Session 11: Capstone Presentations

Topic: Final Presentations and Course Wrap-up

- **In-Class Activity:** Students present their final product management projects
- **Exercise:** Peer and instructor feedback on presentations

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WRITTEN ASSIGNMENTS/PROJECTS AND EXAM[S]: DESCRIPTIONS

Due Date

Class 6

Mid-Term Exam (Take Home)

The mid-term exam will be posted on canvas at the beginning of Class 6 and you will be required to submit your answer on canvas at the end of Class 6 (3 hours).

Max length: 3 hours (duration of Class 6)

Value: 30%

Class 11

Team Assignment

Your team will (i) DESCRIBE an existing product, (ii) ASSESS its effectiveness using the concepts and tools discussed in the course, and (iii) RECOMMEND changes to the product to improve its effectiveness.

Max length: Team of 7 students will work on a particular product. The team will do a 20 minute presentation in class that covers all 3 sections (i.e., DESCRIBE, ASSESS, and RECOMMEND)

Value: 30%

Due Date

During Examination Period	Final Exam (Take Home) The final exam will be posted on canvas at the beginning of scheduled date/time for the final exam and you will be required to submit your answer on canvas at the end of the stipulated time. *Max length: 3 hours (during the examination period)* *Value: 40%*

EVALUATION OF WRITTEN ASSIGNMENTS/PROJECTS AND EXAMS

My turnaround time for grading is 1 week. This will give you ample time to learn from my feedback on your performance. The intent is to ensure that you are well prepared by the time of the final exam.

CALCULATION OF COURSE GRADE

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

GRADE	GRADE POINT	PERCENTAGE	DESCRIPTION
A+	9	≥91-100	Exceptional
A	8	≥86-90	Excellent
A-	7	≥80-85	Very Good
B+	6	≥75-79	Good
B	5	≥70-74	Competent
B-	4	≥65-69	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 Program Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

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

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

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

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

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

Exams (Absence from)
Mid-term. Students who miss a mid-term examination must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file.
Final. Within 24 hours of missing a final examination, students must contact the Director of Student Services, at (416) 736-5060 and must also contact their course instructor. Formal, original documentation regarding the reason for missing the exam must be submitted to the Director of Student Services, Associate Director, Undergraduate Programs Unit (SSB Room W262) within 48 hours of missing the final exam. Students who miss a final exam due to illness must have their doctor complete an "Attending Physician's Statement." For a copy of this document, visit:
http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf

QUICK REFERENCE: SUMMARY OF CLASSES, ACTIVITIES, AND DELIVERABLES

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)
Session 1: Introduction to Product Management **Topic:** The WHY, WHAT, and WHO of Product Management	Lecture/Discussion	Banfield et al. – Part 1
Session 2: Understanding Stakeholders and Users **Topic:** Defining the Target Audience and Stakeholder Collaboration	Lecture/Discussion	Cagan – Part 1 and Part 2
Session 3: Jobs to be Done Theory – Part 1 **Topic:** Product Development through the "Jobs to be Done" Framework	Lecture/Discussion	Kelment – Chapters 1 to 8
Session 4: Jobs to be Done Theory – Part 2 **Topic:** Applying the "Jobs to be Done" Framework in Practice	Lecture/Discussion	Klement – Chapters 9 to 16
Session 5: Product Development and Road-mapping **Topic:** Practical Approaches to Product Development	Guest Lecture/Discussion	Cagan – Part 3
Session 6: Mid-Term Exam (30%) – Take Home (during class time)	Mid-Term Exam	
Session 7: Process Management in Product Development **Topic:** Managing Product Development Processes	Lecture/Discussion	Cagan – Part 4

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)
Session 8: Product Development Metrics and KPIs **Topic:** Measuring Product Success	Guest Lecture/Discussion	Cagan – Part 4
Session 9: Ethics and Managing the Product Ecosystem **Topic:** Ethical Considerations and Ecosystem Management	Lecture/Discussion	Banfield et al. – Part 3
Session 10: Preparing for Product Management Careers **Topic:** Career Preparation and Industry Trends	Lecture/Discussion	Exponent.com; coursera.org; productschool.com; youtube.com
Session 11: Capstone Presentations **Topic:** Final Presentations and Course Wrap-up	In-Class Presentations	

MEMORANDUM

York University Libraries

To: Ashwin W Joshi, Associate Dean Programs, Associate Professor of Marketing, Schulich School of Business

From: Xuemei Li, Data Services Librarian, Open Scholarly

Date: February 24, 2025

Subject: Library Statement – MKTG 5210: Product Management

Summary

York University Libraries (YUL) is well positioned to support the proposed course from which students will learn the skills to strategically drive the development, launch, and improvement of a company's products. The course covers the product lifecycle, form brainstorming and customer research to strategic planning and team leadership. In addition, students will learn the responsibilities, skills, and knowledge needed to drive product management success. Students can make use of an array of library resources and services to complete the assignments in this course. This statement highlights offerings related to the major themes of the course.

Collections

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

- Product management, New products, Product design, Design thinking, Marketing, Market strategy, Consumer behavior, Consumer research, Project management, Usability testing, Cross-functional teams, and Social responsibility of business.

The required textbooks listed in this course proposal and outline that are not currently in our collections will be ordered and added to our collections before the course is delivered. The Libraries will attempt to purchase e-books instead of print books, where possible. It is recommended that the instructor use the Copyright Office's Course Reading List/Syllabus Review Service to ensure that the terms of use for the various materials allow for the content to be used in a course.

The Omni single-search interface provides students with access to a wide range of materials, including books, book chapters, articles, dissertations, streaming media, etc. Library users may also request items from partner libraries through Omni. Based on the librarian's review of class themes and weekly topics, a tailored selection of electronic databases of interest for this course are highlighted below. The A-Z list on the Libraries' website provides a complete register of electronic offerings.

Core Market & Industry Research Databases:

- Passport
- Marketline
- IBISworld
- Gartner Intraweb
- SimplyAnalytics
- Vivintel (formerly Dapresy)

Core Company Research Databases:

- Mergent Online
- Marketline Advantage
- Mergent Intellect

Business Scholarly & Trade Publication Databases:

- Proquest Business Complete
- Business Source Complete

Newspaper/ Magazine Databases:

- Factiva
- Nexis Uni
- Press Reader

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:

- Market Research Guide
- Company Research Guide
- Industry Research Guide
- Step-by-Step Business Research Tutorials

- Artificial Intelligence Guide
- Business Citation Guide

Research Help

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

Accessibility Services

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

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 Technology MBA Program

2. Responsible Unit: OMIS

3. Subject Code (Rubric) and Course Number: OMIS 6010

4. Credit Value: 4.5

5. Long Course Title: Technology Consulting Project

6. Short Course Title: Technology Consulting Project

7. Effective Term/Calendar Year: Summer 2027

8. Language of Instruction: English

9. Calendar (Short) Course Description:
Technology Consulting Project is a capstone, integrative course designed to provide students with hands-on experience in technology-driven problem-solving. This one-term, 3-credit course enables students to apply their knowledge and methodologies in a real-world consulting environment. Working in teams, students collaborate with an organization ("client site") to analyze a technology-related challenge, develop strategic recommendations, and deliver actionable insights. The course culminates in a final report and presentation to a panel of experts, including the course director, as well as to the client organization.
(Prerequisite not required)

This is the description of the course as it will appear in the University course repository and related publications. Calendar (short) course descriptions should be written in the present tense and may be a maximum of 60 words. ***Please include information with respect to any pre-/co-requisites and/or cross-listing or integration in the course description****.*

10. Expanded Course Description:

Upon completion of the **Tech Consulting Project**, students will be able to **analyze, synthesize, and communicate insights effectively** to address real-world technology challenges. They will develop expertise in **technology-driven decision-making** and **strategic problem-solving** within a real organizational setting.

Key Competencies Developed

Students will gain both **conceptual understanding** and **methodological competence** in:

- **Technology-driven problem-solving** – Applying strategic frameworks to assess and solve business challenges using technology.
- **Value creation through technology** – Understanding how digital transformation and emerging technologies enhance business performance and drive organizational growth.

Professional and Transferable Skills

The **Tech Consulting Project** will also refine **critical professional skills** essential for career success, including:

- **Initiative and accountability** – Managing projects independently while maintaining responsibility for outcomes.
- **Intellectual independence** – Engaging in continuous professional development and adapting to evolving technologies.
- **Strategic thinking** – Evaluating the broader business implications of technology and analytics in various contexts.
- **Effective communication** – Conveying complex ideas, insights, and recommendations clearly to diverse stakeholders.

This course provides a **structured, hands-on experience** that prepares students for **technology consulting roles, digital transformation initiatives, and leadership positions in tech-driven industries**.

11. Course Learning Outcomes:

Upon completing the Tech Consulting Project, students will:

1. **Analyze and Solve Technology Challenges** – Apply strategic frameworks to assess and address real-world business problems using technology.
2. **Leverage Technology for Value Creation** – Understand how digital transformation and emerging technologies drive business performance and organizational growth.
3. **Develop Strategic and Critical Thinking** – Evaluate the broader business impact of technology and analytics across different contexts.
4. **Enhance Professional and Transferable Skills** – Build key competencies in initiative, accountability, intellectual independence, and adaptability to evolving technologies.

5. **Communicate Insights Effectively** – Synthesize complex information and present clear, actionable recommendations to diverse stakeholders.
6. **Gain Hands-on Experience for Tech Consulting Careers** – Prepare for roles in technology consulting, digital transformation, and leadership in tech-driven industries.

(Necessary for Quality Assurance approval and cyclical program reviews)
What will students be able to do upon completion of this course specifically?

12. Rationale:

The **Tech Consulting Project** is a capstone experience designed to integrate and apply the knowledge and skills gained throughout the Schulich **Tech MBA Program**. As businesses increasingly rely on technology-driven strategies for competitive advantage, there is a growing demand for professionals who can bridge the gap between **technology and business strategy**. This course equips students with the ability to **analyze, synthesize, and communicate technology insights effectively** to address real-world business challenges.

Alignment with the Schulich Tech MBA Program Objectives

1. **Bridging Technology and Business**
   - The Schulich Tech MBA emphasizes the **intersection of technology, analytics, and business strategy**. This course reinforces that focus by requiring students to apply **technology-driven problem-solving frameworks**in real-world consulting scenarios.
2. **Developing Decision-Making and Leadership Skills**
   - A core pillar of the program is **data-driven decision-making and strategic leadership in technology-driven organizations**. This course enables students to **make informed, technology-based decisions**, enhancing their ability to **lead digital transformation initiatives** in organizations.
3. **Enhancing Practical, Hands-on Experience**
   - The Schulich Tech MBA is designed to be **experiential and applied**. This course provides a **structured, real-world consulting experience** where students work with organizations to solve **complex business challenges through technology and analytics**.
4. **Building Industry-Relevant Skills for Career Success**
   - The Tech Consulting Project helps students develop essential **professional and transferable skills**, such as:
     - **Strategic problem-solving** in tech-driven environments
     - **Effective communication of insights** to diverse stakeholders
     - **Intellectual independence and adaptability** to emerging technologies
     - **Project and client management skills** critical for consulting and leadership roles
5. **Positioning Graduates for High-Impact Careers**
   - As Schulich Tech MBA graduates move into **technology leadership, digital transformation, and tech consulting roles**, this course provides the necessary

experience to **demonstrate their ability to apply strategic and analytical skills** in solving real business challenges.

Conclusion

The **Tech Consulting Project** is a critical component of the Schulich Tech MBA, aligning with the program's mission to **develop future technology leaders**. By **applying technology frameworks, solving real-world business problems, and refining professional skills**, students emerge **industry-ready**, equipped to drive **digital transformation and innovation in tech-driven organizations**.

13. Evaluation:

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

Assignment/Task	Quantity	% Weight	Total %
Milestone 1 (Proposal)	1	10%	10%
Milestone 2 (Methodology)	1	20%	20%
Milestone 3 (Initial Results)	1	20%	50%
Milestone 4 (Final Presentation)	1	25%	75%
Final Report	1	25%	100%

14. Integrated Courses: N/A

15. Cross-listed Courses: N/A

16. Enrolment Notes: N/A

This course is designed for the MBA in Technology Leadership Program

17. Faculty Resources:

Murat Kristal
Isik Bicer

18. Physical Resources: Standard course delivery resources – screens for display of material

19. Bibliography and Library Statement: Attached

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

Schulich
School of Business
York University

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

20. Instructors and Faculty Coordinator

Initial instructor:
Murat Kristal

Alternative instructors:
Isik Bicer

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

21. Specializations

Primary area or specialization:
OMIS

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

22. Student Contact and Enrolment

Contact hours:
12

Maximum enrolment:
55

Expected enrolment:
40

Evidence for enrolment expectations:
The Tech MBA program is growing steadily. In the next year, we expect to have 30 students.

23. Equity, Diversity, Inclusion, Decolonization and Indigenization Action Plan
We will touch upon DEI concepts throughout the course where applicable.

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24. Human Participants Research

"N/A".

25. Conditions for Approval

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

a) **The Area is deleting courses with at least the same total number of credits.**
Specify the course or courses being deleted.

b) **Provide a convincing case for the proposed course.**
State the reason the program needs this new course and provide evidence that the Area has no elective with student enrolments low enough to warrant deletion. Approval from the ADA will be required.

Originator:

	March 11th, 2025
Signature	Date
Murat Kristal	OMIS
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.

Vibhuti Dhingra	OMIS
Markus Biehl	OMIS
David Johnston	OMIS
Isik Bicer	OMIS

Schulich
School of Business
York University

Henry M. Kim OMIS

Murat Kristal OMIS

Approvals

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

	March 11th, 2025
Signature	Date
Henry Kim	
Name of Coordinator or Director	Area or Specialization

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

	March 11th, 2025
Signature	Date
Murat Kristal	MBA in Technology Leadership
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	November 20, 2025
Signature	Date

Kevin Tasa	Master Programs Committee
Name of Committee Chair	Committee

OMIS XXXX 3.00: Tech Consulting PROJECT

Summer 2027

Instructor

Murat Kristal
S341 Seymour Schulich Building (SSB)
Email: mkristal@schulich.yorku.ca
Telephone: (416) 736-2100 x. 44593
Office hours: by appointment

Assistant

Paula Gowdie Rose
416-736-5074
S337 SSB
pgowdierose@schulich.yorku.ca

Professor Murat Kristal, PhD (University of North Carolina at Chapel Hill), is the Program Director of the MBA in Technology Leadership program and a Professor of Operations Management and Information Systems at the Schulich School of Business, York University. His research focuses on AI management, digital transformation, and operations analytics. His recent projects include the Digital Transformation Maturity Index for Financial Institutions and research on the digitization of operations in the financial services sector. He is also an Executive Committee Member of the AI & Society Organized Research Unit and a Chair of the Innovation and Commercialization Committee for Connected Minds.

Course Description

Technology Consulting Project is a capstone, integrative course designed to provide students with hands-on experience in technology-driven problem-solving. This one-term, 3-credit course enables students to apply their knowledge and methodologies in a real-world consulting environment. Working in teams, students collaborate with an organization ("client site") to analyze a technology-related challenge, develop strategic recommendations, and deliver actionable insights. The course culminates in a final report and presentation to a panel of experts, including the course director, as well as to the client organization.

How the Course Works

Successful completion of this project involves several key steps, outlined below and detailed throughout the course outline.

Group Formation and Project Selection

- Students will work in teams of **four** and must finalize their groups by the **end of the first two weeks of the term**.
- The **company for the project** will be provided by Schulich. However, students who have a preferred company may submit their proposal, including the company's name and a contact person, for approval within the first two weeks.
- Eligible organizations include **businesses, non-profits, start-ups, or community organizations**.
- The project scope will be **negotiated between the student group, the organization's management, and the course instructor** and formalized in a document called the **"Statement of Work."**

Project Timeline and Check-ins

- The course is designed to be **manageable within a single term**, with structured milestones to guide progress.
- Student groups will meet with the course instructor **biweekly** to provide updates and receive feedback.
- During these meetings, groups will:
    - Review initial objectives and any changes.
    - Provide updates on their progress.
    - Discuss any challenges and next steps to ensure timely project completion.

Project Milestones

Groups are expected to complete the following milestones:

1. **Understanding the business process and identifying the technology-related problem.**
2. **Identifying key variables related to the problem and outlining data processing steps (if applicable).**
3. **Developing an approach and methodology to address the business challenge.**
4. **Conducting initial analysis and refining the approach based on findings.**
5. **Delivering the final project report and presentation.**

Final Deliverables

- **Final Presentation:** 20-minute presentation followed by up to **40 minutes of Q&A.**
- **Final Report:** Maximum of **40 pages, double-spaced, 12-pt font.**
- Detailed expectations for the report will be provided. **There is no fixed grading rubric**, as evaluation will depend on the nature of the project and organizational needs.

Prerequisites/Corequisites/Course Exclusions: This is the **capstone course** of the **Tech Consulting Project**, spanning **one term**. Students must successfully complete all required coursework to be **eligible for graduation**.

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Course Learning Outcomes

Upon completion of the **Tech Consulting Project**, students will be able to **analyze, synthesize, and communicate insights effectively** to address real-world technology challenges. They will develop expertise in **technology-driven decision-making** and **strategic problem-solving** within a real organizational setting.

Key Competencies Developed

Students will gain both **conceptual understanding** and **methodological competence** in:

- **Technology-driven problem-solving** – Applying strategic frameworks to assess and solve business challenges using technology.
- **Value creation through technology** – Understanding how digital transformation and emerging technologies enhance business performance and drive organizational growth.

Professional and Transferable Skills

The **Tech Consulting Project** will also refine **critical professional skills** essential for career success, including:

- **Initiative and accountability** – Managing projects independently while maintaining responsibility for outcomes.
- **Intellectual independence** – Engaging in continuous professional development and adapting to evolving technologies.
- **Strategic thinking** – Evaluating the broader business implications of technology and analytics in various contexts.
- **Effective communication** – Conveying complex ideas, insights, and recommendations clearly to diverse stakeholders.

This course provides a **structured, hands-on experience** that prepares students for **technology consulting roles, digital transformation initiatives, and leadership positions in tech-driven industries**.

Evaluation

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

Assignment/Task	Quantity	% Weight	Total %
Milestone 1 (Proposal)	1	10%	10%
Milestone 2 (Methodology)	1	20%	20%
Milestone 3 (Initial Results)	1	20%	50%
Milestone 4 (Final Presentation)	1	25%	75%
Final Report	1	25%	100%

Assignment/Task	Quantity	% Weight	Total %

Please note that the focus on group work is meant to reflect the nature of how work is done in many firms wherein people regularly form teams to work on key issues. The best time to deal with discord within a group is when it appears, rather than when the final project is due. If team members experience disagreement that they cannot resolve themselves, they should speak with me about it.

To ensure that the team members each deliver on their commitments to the project, a formal peer evaluation process will be used throughout the projects and discussed at each of the milestone meetings. A peer grade allocation process will be used to assess the contributions of individual members to the team. Criteria for the peer evaluation include attendance and participation at team meetings; preparation for meetings; cooperativeness in getting work done; time and effort put into the project; timeliness and quality of the work; use of interpersonal and group dynamic skills, and any other elements of teamwork.

Please take this very seriously, because I do. I will consider this input in assigning the final grade. The grade allocation form is attached and must be submitted, signed by all team members before the final presentation begins. If the document cannot be agreed upon by all group members, the final meeting will be rescheduled at my convenience.

Course Material

Required Readings:
There are no required readings for this course, but there is a reading list that is highly recommended, especially in light of the fact that your group may not have much experience in the areas of consulting, or market research. Further there are some readings on making excellent presentations that should be thoroughly examined.

1) HBR Case: When Consultants and Clients Clash. Harvard Business School Press Reprint 97605X
2) Market Research: Listen & Learn. **Product #:** 2750BC-PDF-ENG, Harvard Business School Press
3) Why the Lean Start Up Changes Everything. Reprint R1305C, Harvard Business School Press
4) Market Research Toolbox Chapter 9 and 10 by Ed Mcquarrie
5) "How to Pitch a Brilliant Idea" Elsbach, K. HBR September 2003
6) "Presenting to Win "The Art of Telling Your Story"" Weissman, J. Pages XXIX-XLII, 3-25
7) ``Pitfalls in Meetings and How to Avoid Them`` Edward Prewitt **Product #**U9806D-PDF-ENG HBS Press

Links to the readings will be posted on the York University Library web site. To access this site, go to www.library.yorku.ca and click on Course Reserve Material, then enter the course number.

Course Materials Database (CMD):

A Course Materials Database ('CMD') has been created for this course within Lotus Notes. Every CMD includes some important general information for Schulich students. I post rubrics, resources and special instructions on assignments on the CMD. Please get into the habit of checking the CMD on a regular basis. Feel free to e-mail me with questions or concerns throughout the term.

Expectations of Students in the Course

Classes: This course has 6 formal classroom sessions. First class will be held in the beginning of the Summer Term, where I will introduce you to the course and take you through the deliverables and timetable for completion. We will also discuss the scoping process, the research process, and the importance of confidentiality. Course procedures and grading guidelines will also be discussed. You will also choose the specific dates and times for your milestone meetings with me. This class is mandatory for all students in the course.

The second formal session will occur during week 3 of the Summer Term, when we will meet as a full group. This session is also the first deliverable (Milestone 1) of the course, in which you will present a proposal outlining the scope of your project. You will be asked to make a presentation with no more than 10 slides that outlines the company, the business problem and the expected outcomes of the project. The presentation in this meeting is worth 10% of your total grade.

In the fourth formal session (Milestone 2), you will present a detailed outline of the methodologies that you will follow for your project. The presentation in this meeting is worth 20% of your total grade.

In the fifth formal session (Milestone 3), the groups will present the initial results of their analysis of the data. The presentation in this meeting is worth 20% of your total grade.

At the end of the Summer Term, at the sixth formal session, the groups will deliver their Final Presentation to me and to the representatives of the organizations that they are working for. The presentation in this meeting is worth 25% of your total grade.

Initiative and Communication: Because this course has few scheduled classes, it is critical that each team manages their workload and takes initiative to develop and complete the project plan. Providing a good solid project report to the client not only increases your learning and career prospects, but also increases Schulich's reputation among the employer community. While there are six formal assessment points for your progress, you are encouraged to make an appointment with me if you are facing any challenges with data collection, your client, your analysis or the working relationships within your group.

Presentations: All the team members are required to be present in all formal sessions. Failing to attend the formal presentations will lead to 10% reduction in your final grade.

Note: If any changes in this schedule become necessary, notifications will be posted on the course CMD, and when changes need to be announced between classes, an email will be sent to students' Lotus Notes email accounts, notifying them of the change.

Week to Week Course Schedule

Summer 2027

Activity	Date
Formal Class Room Session 1	Week 1
Groups Confirmed	Week 1
Milestone 1	Week 3
Milestone 2	Week 6 or 7
Milestone 3	Week 9
Milestone 4	Week 12

Assignments

Performance in this course will be evaluated based on five assignments: The Project Plan or the Proposal, the Methodology Paper and Presentation, Initial Analysis Report and Presentation, and Final Report and Presentation. A more detailed description of the assignments follows. Rubrics for the written assignments will be posted on the course website.

Submission Instructions: For the written assignments, please complete all written reports in no less than 12-point font. Please submit hard copies of your reports and final documents to me at the presentation meetings.

Please submit your documents in this format: [XYZ Inc.PP] for the project plan, and similarly for the Status report (XYZ Inc.SR) and Final report (XYZ Inc.FR). Please also make sure you include your names and student numbers on the front of the document itself. **All late submissions will lose 5% of the final grade per day. Assignments that are more than one week overdue will not be accepted, and will be assigned a grade of zero.**

The Project Plan or Proposal will be a preliminary assessment of the company's competitive position in its industry, and a project plan for addressing the specific technological problem the company faces, delivered to your academic project supervisor as a presentation with an accompanying report. This will be worth 10% of the course grade, and it will be due on third week of the Winter Term. You will also have to show evidence that the company has signed off on your project plan.

The Methodology Presentation and Report (Milestone 2). Based on the analysis of the problem the team will present a detailed report on the methodology and the appropriateness of the chosen methodology. The presentation will be accompanied with a written report of no more than 15 double-spaced pages plus appendices. Importantly, teams must present this report to me in a 20-minute presentation. This will be worth 20% of your grade.

The Initial Results Presentation and Report (Milestone 3). In this stage, you will share your initial results with me and the organization that you are working for. As a result, your presentation and the accompanying report must be succinct and written in a way that can be understood by the client site. The presentation will be accompanied with a written report of no more than 15 double-spaced pages plus appendices. This will be worth 20% of your grade.

The Final Presentation and Report. The 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, as well as for any ways of solving the company's analytics problem. The presentation and the report will be worth 50% of the course grade, and it will be due on the last week of the Summer Term. The written report will be no more than 40 double-spaced pages, plus appendices. Importantly, teams must present this report to me in a 20 minute presentation and the client site.

Evaluation of Assignments

Rubrics for each assignment are attached and will be posted on the CMD by the beginning of the SummerTerm.

Calculation of Course Grade

In this class, final course grades will be determined by the following process: Each assignment will receive a grade. These will be combined according to the weightings assigned to each assignment to give a final grade. Grades may be rounded up or down depending on the final class distribution.

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

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

Letter Grade (Schulich)	Index System (Schulich)	Approximate Percentage Range
A+	9	87-100
A	8	84-86
A-	7	80-83

B+	6	77-79
B	5	74-76
B-	4	70-73
C+	3	67-69
C	2	64-66
C-	1	60-63
F	0	< 60

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

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

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

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

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

MEMORANDUM

York University Libraries

To: Murat Kristal, Director, MBA in Technology Leadership, Schulich School of Business

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

Date: March 17, 2025

Subject: Library Statement – OMIS 6010 4.5 Technology Consulting Project

Summary

York University Libraries (YUL) is well positioned to support this proposed course, which is a capstone, integrative course designed to provide students with hands-on experience in technology-driven problem-solving. Students will develop expertise in technology-driven decision-making and strategic problem-solving within a real organizational setting. They will gain the skills to analyze, synthesize, and communicate insights effectively to address real-world technology challenges. 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. It also brings attention to collections of interest from connected fields such as information technology.

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:

- Business consultants, Interprofessional relations, Leadership, Technological innovations, System analysis, Marketing research -- Methodology, Information technology -- Decision making, Group decision making, Problem solving, Communication of technical information, Information technology -- Management and Business presentations 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.

No textbook is required for this course. Instructors can consult our Harvard Business Review Guide to obtain permalinks for HBR articles or to refer students here to search for these articles via the library's subscription. The recommended HBR cases can be purchased directly through publishing website. The Libraries have recently acquired Sage Business Cases, and instructors are encouraged to explore relevant cases that are freely accessible to students. It is recommended that the instructor use the Copyright Office's Course Reading List/Syllabus Review Service to ensure that the terms of use for the various materials allow for the content to be used in a course. Their staff can also assist in creating permanent links to library content, which can be embedded in Canvas for easy student access. Based on the librarian's review of class 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
- Mergent Online
- S&P Capital IQ
- IBISworld
- BMI (formerly FitchConnect)
- Marketline Advantage
- Passport
- Statista
- Privco
- Bloomberg

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:

- 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 with questions.

Schulich
School of Business
York University

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program:
MBA in Technology Leadership

2. Responsible Unit:
MGMT

3. Subject Code (Rubric) and Course Number:
MGMT 6110

4. Credit Value:
6.0

5. Long Course Title:
VENTURE STUDIO THE ACCELERATION MISSION

6. Short Course Title:
VENTURE STUDIO

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

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

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

Schulich
School of Business
York University

SUMMER 2027

9. Rationale:

This is a part of the Tech MBA Detailed Minor Program Changes. Upon detailed review (during our pilot term in the Summer of 2024) it was determined that the classes and work integrated learning were commensurate with a 4.5 course the associated hours. The rest of the course description stays the same.
.

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):**
VENTURE STUDIO THE ACCELERATION MISSION ~~Credit Value 6.0~~	**VENTURE STUDIO THE ACCELERATION MISSION** Credit Value 4.5

11. Enrolment Notes:

This is a course in the Tech MBA Program, in the future it can also be taken by students in the other graduate programs within Schulich.

12. Consultation:

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

Murat Kristal	OMIS
Guangrui Kayla Li	OMIS
Isik Bicer	OMIS
Vibhuti Dhingra	OMIS
Henry M. Kim	OMIS
Markus Biehl	OMIS

Originator:

Schulich
School of Business
York University

Signature	Date
Chris Carder	MGMT
Name	Area or Specialization

Approvals:

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

Signature	Oct 27th, 2025 Date
Murat Kristal	Tech MBA
Name	Area or Specialization

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

Signature	Oct 27th, 2025 Date
Name of Program Director	Program

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

Schulich
School of Business
York University

Kevin Tasa	November 20, 2025
Signature	Date
Kevin Tasa	Master Programs Committee
Name of Committee Chair	Committee

last updated: Aug 15 3:08pm EDT.

Schulich School of Business

MGMT6110 S2025 **CREDITS: 4.5**

MGMT 6110 M - VENTURE STUDIO THE ACCELERATION MISSION

TUE 18:00 - 20:50 EXTERNAL 4TH FLOOR, ONEELEVEN

THU 11:30 - 14:20 EXTERNAL 4TH FLOOR, ONEELEVEN

COURSE DIRECTOR

John Jack Fraser

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N305A SSB

This course is intended for Schulich Students enrolled in the MBat program. This course is scheduled to meet on: Meet dates to be determined.

CHRIS CARDER - COURSE DIRECTOR

JACK FRASER - INSTRUCTOR

MATTHEW LOMBARDI - INSTRUCTOR

VINCENT LIU - INSTRUCTOR

BRIEF DESCRIPTION

This Work Integrated Learning Course (class + startup/founder placement + dedicated additional mentor model) provides students with the opportunity to learn leading product design/roadmap/management strategies and frameworks for high-growth potential technology firms. Students will further learn how those strategies and frameworks connect directly to the investments placed by Venture (VC) Investors seeking scaling tech 'unicorn' firms.

COURSE LEARNING OUTCOMES

The Schulich Tech MBA “Venture Studio” features a strategic partnership between Schulich and OneEleven (one of Canada’s most prominent tech accelerators, located in downtown Toronto).

The Venture Studio offers a unique collaborative environment where our next generation of business leaders work alongside a hand-picked group of high-potential startup/scaleup leaders as they prepare for their next fundraising mission.

Students will experience guest lectures from accomplished founders and venture capitalists and participate in joint events with the OneEleven community (and additional networking opportunities).

Students will have the opportunity to engage with real-world business challenges, gain unparalleled industry insights, and forge relationships that will transform their career trajectory. The Venture Studio is perfectly placed in the third term (summer), leveraging the foundational knowledge students aquire in their first two terms and preparing them well for their work placement in the fourth and final term.

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Individual Assignments 50%			
Startup Video Pitch		10%	Fri May 23, 2025 at 05:00pm EDT
Customer Discovery & JTBDs		10%	Sun May 25, 2025 at 05:00pm EDT
Product Requirements Doc (PRD)		10%	Sat Jun 14, 2025 at 05:00pm EDT
Term Sheet Negotiation - Use What You've Learned		10%	Fri Jun 27, 2025 at 05:00pm EDT
Participation		10%	
Group Assignments 50%			
Data Room Report		4.9%	Thu Jun 26, 2025 at 05:00pm EDT
VC Tour Design Report		4.9%	Thu Jul 3, 2025 at 10:00am EDT
Product Diagnostic Report		14.71%	Tue Jul 15, 2025 at 05:00pm EDT
Venture (VC) Diagnostic Report		14.71%	Tue Jul 22, 2025 at 05:00pm EDT
Final Presentation		9.8%	Thu Jul 31, 2025 at 01:00pm EDT
VC Diagnostic - Opening Exercise omited from final grade.		0.98%	Wed May 7, 2025 at 05:00pm EDT

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Startup Video Pitch

Due Date: Fri May 23, 2025 at 05:00pm EDT

Objective:

Select a startup (Series A-C) that has publicly announced a raise of VC funding within the past 12 months (NOT the one you've been assigned for this class!), and prepare a short pitch for potential venture capital investors, assuming the

company needs to raise additional funding in short order. Assume the role of the founder(s).

Description:

Each student will select a qualifying startup. The task is to analyze the startup's business model, growth potential, competitive landscape, and overall health. This will not include a financial analysis. Instead, you will draw upon the principles in Zero to One, from your reading list, to frame your analysis. Based on the analysis, students will prepare a short video pitch aimed at convincing potential venture capitalists to invest in the startup.

Tasks, deliverable and grading rubric:

-Speak to the viability and scalability of the startup's technology, product, and business model. (30%)

- Speak to the size of the market, growth potential, and the startup's competitive position. (30%)

Pitch Creation: Develop a short pitch that can be verbally delivered as a recorded video in under 4 minutes that includes the business model, market analysis, competitive advantage, and any other germane details (40% for quality of pitch delivery in the video).

Remember -- you are not being asked to deliver financial analysis. You are being asked to TELL THE STORY!

Customer Discovery & JTBDs

Due Date: Sun May 25, 2025 at 05:00pm EDT

Objective

Develop skills in identifying customer profiles and honing in on the ideal customer profile (ICP), interviewing customers and building empathy, and eliciting jobs-to-be-done (JTBDs).

Description

In this assignment, you will choose a product that you regularly use and are familiar with to deep dive into the problems that it solves for you and other users. The desired outcome is for you to understand the ICP of the product, build empathy for users, and identify core JTBDs of the product.

Instructions & Tasks

- **Product Selection**: Choose a **software or hardware product** that you personally use and are familiar with. **Do not select** social media apps (e.g., TikTok, Instagram) or service-based offerings (e.g., haircut, food delivery). Briefly explain why you selected this product.
- **Identify Customer Profiles**: Define three distinct customer profiles for the product. Consider traits such as demographics, behaviours, motivations, and pain points. Select one profile as your Ideal Customer Profile (ICP) and justify why this group is the most relevant or valuable.
- **Conduct User Interviews**: Interview at least 5 users of the product. Extract direct quotes, behaviours, and themes that demonstrate user pain points, motivations, and outcomes. Build empathy by listening deeply and observing real needs.
- **JTBD Analysis**: Derive five Jobs-To-Be-Done (JTBD) statements based on your interviews. Each JTBD should reflect a meaningful user need, goal, or pain point. Support each JTBD with evidence from your interviews (e.g., quotes,

paraphrased insights).

Deliverable

- Written document, maximum 3 pages
- Formatting requirements:
  - Font: Arial
  - Font size: 11
  - Normal margins and line spacing
- Your document should include the following **sections**:
  1. **Introduction**
     - Briefly introduce the selected product and your chosen ICP.
  2. **Customer Profiles**
     - Describe the three customer profiles you identified.
     - Explain your rationale for selecting your ICP.
  3. **JTBD Analysis**
     - Present at least **five JTBD statements** derived from user interviews.
     - Include quotes and themes from interviews to illustrate and validate each JTBD.
  4. **Conclusion**
     - Summarize your key insights from the research.
     - Reflect on the value of customer discovery and JTBD thinking in product management.

Due Date

Assigned: Class 4
Due: May 25

Grading Rubric

- Product Selection (10%): Clear rationale for chosen product
- Customer Profiles and ICP (25%): Quality and clarity of profiles; strength of ICP justification
- Interviews and JTBD Analysis (40%): Depth of insights from interviews; clarity and relevance of JTBDs
- Doc Quality (15%): Organization, grammar, writing clarity, and formatting compliance
- Insights and Reflection (10%): Quality of concluding reflections and connection to product management learnings

Example:

BabyTracker is an app designed for parents to track feeding, sleep, and diapers. The three customer profiles are: (1) first-time parents, (2) parents with multiple children, and (3) pediatricians. The Ideal Customer Profile is first-time parents because they face high uncertainty and information overload. I conducted 5 interviews, which validated key JTBDs such as “Help me remember when I last fed the baby.” A user noted: “At 3 AM, I don’t remember anything - I need something to track it all."

Product Requirements Doc (PRD)

Due Date: Sat Jun 14, 2025 at 05:00pm EDT

Objective:

Build a Product Requirements Document (PRD) based on class learnings and draft user stories to articulate a product enhancement that increases user engagement and retention.

Description:

In this assignment, you will take on the role of a Product Manager for a product of your choice. You may use the same product from Assignment 1 or choose a new product you are familiar with. Your primary goal is to increase active usage of the product, with a focus on bringing existing users back.

You will write a PRD focused on a single feature that you believe will achieve this goal. Your PRD should include all relevant sections covered in class, ending with user stories. No need to include wireframes, engineering plans, or launch timelines.

Instructions & Tasks

1. **Select a product:** Choose a hardware or software product that you are familiar with and want to improve. You may reuse the product from Assignment 1 or pick a different one.
2. **Define the engagement or retention problem:** Identify the issue related to retention or recurring usage. Who is affected (your ICP), and what are their pain points (JTBDs)? What's the core problem worth solving?
3. **Select a core metric:** Choose one specific metric to measure active usage (e.g., daily active users, weekly logins, session frequency). Explain why this metric matters and how it ties to business and product success.
4. **Draft the PRD:** Use the PRD template shared in Class 6. Include all the key sections up to user stories.

Deliverable Format

- Written document, maximum 3 pages
- Formatting requirements:
  - Font: Arial
  - Font size: 11
  - Standard margins and normal line spacing
- Your PRD should include the sections from the template shared in Class 6.

Due Date

Assigned: Class 6
Due: June 14

Grading Rubric

- Problem Definition (30%): Clear articulation of the problem, ICP, and relevant JTBDs
- Success Metrics (10%): Selection of a meaningful metric with clear rationale and baseline
- Identification of Risks (10%): Identification of key risks and mitigation strategies

- Solution Generation (20%): Drafting clear, relevant user stories that align with the problem and metric
- PRD Quality (30%): Well-structured, complete PRD up to user stories, adhering to formatting guidelines

Term Sheet Negotiation - Use What You've Learned

Due Date: Fri Jun 27, 2025 at 05:00pm EDT

Objective:

Participate in a mock negotiation process between a startup and venture capitalists to secure funding under realistic terms and conditions.

Jack will provide you with a first offer term sheet to consider for this assignment. --> **SeriesATermSheet.pdf (https://schulich.instructure.com/courses/12933/files/1438177?verifier=4nJzdniaGqTzJYQlQ8JwhWdUI0OoV52ZJtXmZ5UP&wrap=1) (https://schulich.instructure.com/courses/12933/files/1438177/download?verifier=4nJzdniaGqTzJYQlQ8JwhWdUI0OoV52ZJtXmZ5UP&download_frd=1)**

Description:

The goal is to secure funding on favourable terms while addressing the concerns and objectives of potential investors. Students will be provided a 'first offer' term sheet. They must take the term sheet provided, consider it, and submit a marked up counter.

N.B. For a quick refresher on key terms from Brad Feld's assigned reading from earlier in this class: https://feld.com/archives/2008/06/revisiting-the-term-sheet/

Tasks:

Preparation: Review venture capital investment terms and conditions, including valuation, equity stake, and investor rights of the first offer given to you.

Deal Structuring: Formulate a counter offer that outlines any potential revised investment terms, including but not limited to valuation, equity, milestones, exit strategies, liquidation pref, board control, antidilution, vesting of founder shares, protective provisions, ROFR, drag-along, info and inspection rights, etc.

Deliverable and grading rubric:

A written term sheet counter offer detailing the proposed revisions to the investment agreement, and *rationale for each proposed revision* (100%). Explain the rationale for your counter proposal changes.

Evaluation Criteria

- Clarity and completeness of the assessment - 30%
- Quality and consistency of recommendations - 40%
- Strategic insights and practical recommendations - 30%

Participation

On time to class. Participate in class.

Data Room Report

Due Date: Thu Jun 26, 2025 at 05:00pm EDT

Situation

You are the chief advisor to your assigned startup, which is preparing for a fundraise. Your task is to compile a comprehensive Data Room Report to kick off due diligence and impress your prospective VC backers. If a data room does not currently exist, you will imagine it from scratch; if one already exists, your task is to recommend how to improve it. Use the assigned readings for frameworks/guidance.

Deliverables

- Assessment of the key components of the data room required given the stage of this fundraise (e.g., Series A); the type of company you are helping (e.g., D2C)
- Template for the Data Room, in easy-to-use format for the company

Guidelines

- For the assessment: Maximum 1 page single spaced description in detail of what to include for the key components -- highlight key insights and recommendations;
- For the template: select a tool such as Notion or Google Drive and build the actual template -- ensure it is visually appealing
- Format: For the assessment, a word document; for the data room template, a private weblink to the desired tool (e.g., Notion)

Tips

- Use clear, concise language and support your recommendations with specific rationale.
- Present information in a logical and structured manner.
- Anticipate potential questions and be prepared with well-thought-out answers.

Evaluation Criteria

- Clarity and completeness of the assessment - 25%
- Quality and consistency of recommendations - 25%
- Strategic insights and practical recommendations - 25%
- Overall presentation and professionalism of the data room template -- it should be visually appealing - 25%

VC Tour Design Report

Due Date: Thu Jul 3, 2025 at 10:00am EDT

Situation

You are the chief advisor to your assigned startup, which is preparing to raise a round of funding. Your task is to design a "High-Velocity Fundraising" process, as described by Chris Neumann (https://chrisneumann.com/archives/high-velocity-fundraising), to help your startup maximize investor interest.

Deliverables

- Strategic Tour Design

  - Explanation of the function and importance of high-velocity fundraising
  - Overview of the fundraising timeline and key milestones (consider a GANTT chart) -- detailed week by week schedule of the process
  - Plan for leveraging early-meeting feedback to refine the pitch
  - Process for diligencing VCs to ensure they have available funds
  - Plan for managing initial and follow-up meetings, including How your company might handle rejections
  - Strategies for creating a sense of urgency and maintaining investor interest
- Investor Identification -- target pipeline
  - Criteria for identifying and prioritizing potential lead investors - Criteria you have designed, specific to your startup, for selecting which VCs to approach first, second, and third (i.e. type of VC, investment thesis of VC, whether/what interaction(s) your startup has already had with them, are they a new or old investor and what that might signal to the market, etc.) -- clearly articulate your reasons for each selection

Guidelines

Provide detailed explanations and actionable insights for your startup. Are there any clear strengths or gaps in their existing fundraising efforts or process you know of our can identify? If you already possess certain information (e.g., you know your startup has already talked to investor X in the past, and understand why they previosuly did not invest but wanted to stay in touch, use that knowledge; if you do not, that is ok.; Make sure to draw on lessons learned from our classes to date, such as what Jack taught us about signaling when a round is totally an 'inside round', as you craft your pipeline recommendations)

Submission Format

- Strategic Tour: A word document, no more than 2 pages.
- Investor identification: One spreadsheet with your researched pipeline of qualified targets
  - Please use something similar in simplicity to Chris' template which is embedded in this blog post: **https://chrisneumann.com/archives/filling-your-fundraising-funnel (https://chrisneumann.com/archives/filling-your-fundraising-funnel)**

Tips

- Use clear, concise language and support your recommendations with facts/data/evidence
- Present information in a logical and structured manner.
- Visual aids (i.e. GANTT chart) are encouraged to enhance understanding of the Strategic Tour
- Anticipate potential questions and be prepared with well-thought-out answers.

Evaluation Criteria

- Clarity and completeness of the tour design and selected investors - 30%
- Strategic insights and practical recommendations - 40%
- Overall presentation and professionalism - 30%

Product Diagnostic Report

Due Date: Tue Jul 15, 2025 at 05:00pm EDT

Situation

You are the newly hired Product Manager at [startup]. The company is raising its next round of funding to further invest into product development efforts.

The Founders and CEO want to reassess the product strategy and identify growth opportunities for the company. They also want you to pitch an innovative product feature idea to capture more of the opportunity.

Deliverable

- Product Strategy
- Prioritized Backlog
- Feature Recommendation (PRD)

Guidelines

- [Max 15 slides]
- 30 min presentation + 10 min Q&A
- Keep it short and succinct
- Drive towards insights and recommendations

Project Strategy

- Key Sections: Diagnosis, Guiding Policy, Coherent Actions
- Questions to answer:
  - Customer: Who is your ICP and what are their JTBDs? What is *not* the ICP and JTBD?
  - Company: How is the P&L doing? What are the business drivers?
  - Product: How is your product performing with the ICP and hired jobs? Assess PMF.
  - Competition: What is the competition doing?
- Tips
  - Clearly lay out the metric you are accountable for
  - Pick 1-2 frameworks to help organize your thoughts
  - Use qualitative and quantitative data (e.g. talk to >10 customers, look at customer feedback, NPS, CSAT, surveys, Sales/Customer Success feedback, online reviews)

Feature Pitch

- What is the problem?
- Why should we solve it?
- How will we know we are successful?
- What are the risks?
- What are the potential design directions and user stories?
- Tips
  - Pick a ICP and a specific user problem to solve
  - Use qualitative and quantitative data where possible
  - Clearly lay out the metric that you are trying to move
  - Address and acknowledge risks with mitigation plans

Venture (VC) Diagnostic Report

Due Date: Tue Jul 22, 2025 at 05:00pm EDT

Background

Review "VC Diagnostic - Opening Exercise" from the beginning of this class.

At that time, with limited knowledge of your assigned startup, you were asked to brainstorm, using theory from our course readings, both:

(a) the high-level categories that are evergreen across all stages and types of VC financing (e.g., every VC will look at: the Team, the TAM/SAM/SOM, etc.), and

(b) consider the specific stage, and other factors specific to the startup you've been assigned, that will be relevant to the types of VCs they'll wantto approach (e.g., customer acquisition costs (CAC) for a VC looking as SaaS startups).

At this stage you should have now been able to dive deep into your company and have a strong understanding of its

strategies, operations, product, and financial performance and forecast.

This assignment is meant to leverage some of your previous work as building blocks, and ultimately, diagnose whether your assigned startup isread y to raise venture capital, diagnose any gaps, and provide recommendations for improvement. Your group report needs to be fit for presentation to the startup, and be useful to them in charting their path forward in raising their next round of capital.

Deliverable:

1) Assessment of the Company Strategy and Business Model

2) Capital Raise: Strategy Proposal and Structure Recommendation

3) Investment Memorandum and Transaction Material (data room) Outline

Guidelines:

-Max 30 powerpoint slides

-Key things to address in your slides:

(a) diagnose whether your assigned startup is ready to raise venture capital;

(b) shine a light on any gaps;

(c) provide recommendations for improvement.

Key Components of the Deliverable:

1) VC-Centric Company Current State Assessment (40%): Take everything you've learned about how VCs think, what they want to see, and assemble this section from the perspective of a VC. This should be broken down into major areas of focus, eg. Market (TAP, SAM, market drivers), Business Model (revenue model, problem being solved), Competitiors, Product (current and road map), Technology, Management, Go To Market Strategy, Financial.

2) Pre-Raise Recommendation and Action Items Report (30%): Cross reference all your new insider knowledge of factors such as the company's product roadmap, runway, customer feedback, burn rate, etc. to provide a comprehensive pre-raise recommendation, including any actions the company needs to take to be fully ready to address in a fundraising discussion. This recommendation should leverage off all your readings and the stage your company is at, eg.Seed, Series A, and what a investor will be reviewing to determine why they should invest in this round.

3) “VC Tour” Analysis and Recommendations: Provide a complete analysis of different investors your company should consider approaching, Angel, VCs, government programs, etc. How will an investor make their required investment returns based upon the company market, profile, exit? Include an analysis on how your company should approach securring a "Lead Investor" for their round and the process and timline this would follow. *[Please remember, this is a separate assignment you have already completed. It will be graded on its own and then integrated into your VC Diagnostic report/presentation].*

4) Fundraising Assets Analysis (30%): Leverage the thinking you've already done when completing the term sheet negotiation assignment. With your respective company, what areas should the founder focus on that will help them secure funding on favourable terms. You should consider all types of frameworks, eg.

smaller/larger round, bridge round, SAFE/convertable debt/preferred equity, etc.

5) Data Room Analysis/Design: If your company has a data room, you should have already determined where some of the gaps are. If they do not, or it is old, what recommnedations should they consider to ensure they have a complete data

room.*[Please remember, this is a separate assignment you have already completed. It will be graded on its own and then integrated into your VC Diagnostic report/presentation].*

VC Readiness Pitch:

Keep your review tight. What are the salient points you need to review and have clear answers for as investors dig in?

Review company current status and state.

- How much cash runway do they have?

- What progress have they made since last raise?

What are key milestones for the new capital raise?

What are the key risks a investor will see with this company and what are the mitigants?

Why should a investor invest in this company?

Who are the investors what would have the most interest based upon company stage and investment returns profile?

Final Presentation

Due Date: Thu Jul 31, 2025 at 01:00pm EDT

This final assignment is meant to leverage your previous work as building blocks, and ultimately, diagnose whether your assigned startup is ready to raise venture capital, diagnose any gaps, and provide recommendations for improvement (across all categories of your VC/Product Diagnostic Assignments).You have two final categories of deliverables to submit:

1. Your final 45 minute summary presentation to your Instructors (graded). 30 minutes presentation with 15 minutes of Instructor questions. Timeclock will be strictly managed in this final presentation.

View this as your time-efficient summary of your analysis and key recommendations for both your VC and Product Diagnostic Reports.

Emphasis for your in-class presentation on your:

- Current State Assessment (Scoring Matrix & Summary Analysis)
- Pre-Raise Recommendation and Action Items Report
- Micro summaries of your Data Room and VC Tour Analysis

Slide Count: No more than twenty (20) slides

2. Your final amalgamated Startup VC Diagnostic Report

Your final report package for your assigned startup company

Important Note: Your founder (or their Advisors/BOD/Executive Team) should be able to review these documents on a go-forward basis without you being there to provide the insights and details verbally.

This is a collection of your reports/assignment that includes:

- VC-Centric Company Current State Assessment/Scorecard
- Pre-Raise Recommendation and Action Items Report

- Data Room Analysis and/or Design Recommendations
- Fundraising Assets Analysis
- “VC Tour” Analysis and Recommendations (should include potential VC’s/Investors you have identified for them)
- Product Strategy & Roadmap
- Key Product Feature Recommendation

Submission Requirements:

Current State Assessment/Scorecard

- Summarize (Instructor presentation) and outline (Startup Report):
  - Diagnose whether your assigned startup is ready to raise venture capital;
  - Note their strengths, but shine a light on key gaps
  - Take everything you've learned about how VCs think, what they want to see, and assemble this section from the perspective of a VC.
  - This should be broken down into major areas of focus, eg. Market (TAP, SAM, market drivers), Business Model (revenue model, problem being solved), Competitors, Product (current and road map), Technology, Management, Go To Market Strategy, Financial.

Pre-Raise Recommendation and Action Items Report

- Summarize (Instructor presentation) and outline (Startup Report):
  - Cross reference all your new insider knowledge of factors such as the company's product roadmap, runway, customer feedback, burn rate, etc. to provide a comprehensive pre-raise recommendation, including a list of any actions the company needs to take to be fully ready to address in a fundraising discussion.
  - These recommendations should leverage off all your readings, classes, interactions with the company and your independent research throughout the course.
  - What does your Startup need to do to successfully achieve its fundraising mission?
  - Include your Capital Raise Strategy and Structure Proposal
- In this section, you must also summarize (Instructor presentation) and outline (Startup Report):
  - “VC Tour” Analysis and Recommendations: Provide a complete analysis of different investors your company should consider approaching, Angel, VCs, government programs, etc. How will an investor make their required investment returns based upon the company market, profile, exit? Include an analysis on how your company should approach securing a "Lead Investor" for their round and the process and timeline this would follow.

Data Room Analysis/Design and Fundraising Assets Analysis:

- If your company has a data room, you should have already determined where some of the gaps are. If they do not, or it is old, what recommendations should they consider to ensure they have a complete data room.

Product Report

From a Product perspective you must summarize (Instructor presentation) outline (Startup Report):

- Your recommended product strategy
- Key Sections: Diagnosis, Guiding Policy, Coherent Actions
- An innovative product feature idea to capture more of the opportunity.
- What is the problem and why should we solve it?
- How will we know we are successful and what are the risks?
- What are the potential design directions and user stories?

VC Diagnostic - Opening Exercise

Due Date: Wed May 7, 2025 at 05:00pm EDT

- Working as one unit, and drawing on the specific readings provided for this exercise, as well as this week’s pre-reads, you will *suggest* the VC Diagnostic that we will use to score you in Class 11 of this course. This includes two pieces:

- Part 1: drawing on the pre-readings for Week 1 of this class, as well as a selection of additional articles (below), spend 15 minutes a group coming up with the high-level categories that are evergreen across all stages and types of VC financing (e.g., every VC will look at: the Team, the TAM/SAM/SOM, etc.). We will then come back into lecture to align on a baseline.
- Part 2: breaking into your assigned teams, and considering the specific stage, and other factors specific to the startup you've been assigned, add additional weights to the diagnostic that will be relevant to the types of VCs you'll want to approach (e.g., customer acquisition costs for a VC looking as SaaS startups). Present these to the class. *Your instructors will consider your suggestions and we will discuss them in the next class. This is strictly a participation grade, and meant to get you thinking and working in your team, there are no wrong answers at this stage!*

GRADING SCHEME

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

CLASS-BY-CLASS SYLLABUS

Class 1 - Welcome to MGMT 6110 Schulich Venture Studio

Overview: Class 1 - May 6 (all 3 instructors)

Class Format

Welcome & Introductions - 1 hour
- The vision of the Venture Studio - Chris
- What you'll learn in the course - Jack
- Introductions - Instructors & Students
- Discussing the class roadmap - Chris
- note that any discrepancies re: assignment due dates -- the due is based on the canvas submission guide. the master source of truth for the reading list is also the reading list attached as a standalone attachment in week 1 on canvas.

Break - 15 minutes

The Companies and Their Mission - 1 hour
- Introducing the Venture Studio startup companies - Jack & Matthew
  - Who are the companies? Why have they come to us? What is the company's time commitment?
  - Discuss confidentiality in a VC process
- The major deliverables (diagnostic reports + VC tour)
  - Product Readiness Report - Vincent
  - VC Diagnostic Creation Exercise - Jack & Matthew

Ask Me Anything & Other Business - 45 minutes
- Other Business - Chris
- Question Period - Instructors
- Wrap up - Chris

Post Class OneEleven Orientation - 30 minutes
- Orientation and tour of OneEleven - Simba Wakatama, Manager Operations and Member Services

Assigned Readings, Cases, etc.

- see attached reading list in week 1 of course.

Assigned work due

see canvas due dates.

Class 2 - So You've Decided to Raise Venture Capital...

Overview: Class 2 - May 8 with Jack

Class Format

The Decision to Raise Venture Capital - 1 hour - Jack
- Why do we take on Venture Capital? When should a firm take on Venture Capital?

Why do Venture Capital firms invest?
What defines a 'venture scale' company?
What do VC's expect as a return?
What consequential path does this put the startup on?
What is their process to source companies and choose investments?
What does Founder control look like on a VC path?
What does the payoff look like when it does/doesn't go well for the founder? For the VC?
Why choose the right investors is a game-changing decision that each Founder faces

Break - 15 minutes

Understanding the VC Landscape - 1 hour - Jack
What does the Canadian VC sector look like?
Where do U.S. and international VC's factor in?
Discussion on current context
Interactive Activity

Guest Lecture & Networking Opportunity - 45 minutes
tbc
Wrap up & networking

Assigned Readings, Cases, etc.

see attached reading list in week 1 of course.

Assigned work due

see canvas due dates.

Class 3 - Diving Deeper into Venture Capital Dynamics

Overview: Class 3 - May 13 Matthew and Jack

Class Format

A "Series" of Big Moments - 2 hours
A word on early days and angelic moments - Matthew
Understanding the series: Seed, Series A-B, Series C, Series D - Jack
Deep Dive: Phase Imperatives - Jack & Matthew
Case Discussion
Reno Run
Hubba

Break - 15 minutes

Instructor Time - 45 minutes
The VC perspective - Vincent
Instructor rotation
Wrap up

Assigned Readings, Cases, etc.

see attached reading list in week 1 of course.

Assigned work due

> see canvas due dates.

Class 4 - Introduction to Product Management & Crafting Product Strategy

> Overview: Class 4 - May 15 Vincent
>
> ### Class Format
>
> Introduction to Product Management - 90 minutes
> - What is product management?
> - A brief history of product management
> - Waterfall vs. agile
> - Typical project manager job description
> - What are the critical skills of a project manager
> - Organization structure
> - Why is product management so important?
> - Jobs to be done
>
> Break - 15 minutes
>
> Crafting Product Strategy - 75 minutes
> - Building the right thing, not the wrong thing
> - Product strategy
> - Laddering of strategy
> - The diagnosis
> - Guiding policy and coherent actions
>
> ### Assigned Readings, Cases, etc.
>
> - see attached reading list in week 1 of course.
>
> ### Assigned work due
>
> see canvas due dates.

Class 5 - Prioritizing a Roadmap & Product Development - Part 1

> Overview: Class 5 - May 22 with Vincent
>
> ### Class Format
>
> Prioritizing a Roadmap - 1 hour
> - Now, next, later
> - Impact vs. effort
> - RICE
>
> Break - 15 minutes
>
> Product Development Process - 1 hour
> - Risk Vectors
> - Stages of product development
> - Discovery - problem definition
>
> Guest Lecture - 45 minutes

tbc

Assigned Readings, Cases, etc.

see attached reading list in week 1 of course.

Assigned work due

see canvas due dates.

Class 6 - Product Development - Part 2 & Taking the Product to Market

Overview: Class 6 - May 27 with Vincent

Class Format

Product Development Process - 1 hour
- Product requirements document
- User stories
- Solution generation
- Solution validation
- Delivery

Break - 15 minutes

Product Development Process - 1 hour
- Go to market

Case Study - 45 minutes

Assigned Readings, Cases, etc.

see attached reading list in week 1 of course.

Assigned work due

see canvas due dates.

Class 7 - Diving Deeper into Venture Capital Dynamics (Continued)

Overview: Class 7 - May 29 with Matthew

Class Format

Understanding and Auditing the Data Room - 1 hour
- Assets and artifacts assessment framework

Break - 15 minutes

Designing the VC Tour - 1 hour
- The VC tour framework
- Understanding resources: Databases of VC's
- Creating a communications/traction framework for the tour
- The speed imperative
- How to choose the right VC for a company
- When/why to raise in Canada and when to go elsewhere

What do local VC's invest in and what don't they invest in?

Designing your Tour - 45 minutes
Group exercise
Wrap up

Assigned Readings, Cases, etc.

see attached reading list in week 1 of course.

Assigned work due

see canvas due dates.

Class 8 - Diving Deeper into Venture Capital Dynamics (Continued)

Overview: Class 8 - June 3 with Jack

Class Format

Understanding the VC Process: Deep Dive - 90 minutes
Who are the players in a fund? What are their roles?
What are some VC 'share language' terms we need to know?
Discussion on process elements
What does this process look like for the Founders on the other side?
Understanding legal
What do the numbers tell us about VC's investing in diverse founders?
What are some of the opportunities for diverse founders that are emerging?

Break - 15 minutes

Understanding the VC Process: Case Studies - 1 hour

Wrap Up - 15 minutes

Assigned Readings, Cases, etc.

see attached reading list in week 1 of course.

Assigned work due

see canvas due dates.

Class 9 - Time to Play the Game!!!!

Overview: Class 9 - June 12

Class Format

Special Guest (Raymond Luk, Founder of Hockeystick.co) - 3 hours
Meet a venture builder, investor, advisor, exited founder
Game Instructions for "Swagger"

Let's Play!

Assigned Readings, Cases, etc.

see attached reading list in week 1 of course.

Assigned work due

see canvas due dates.

Focused WIL Weeks

Overview: Focused WIL weeks (no in-person classes)

Focused WIL: Week June 17 - Work Integrated Learning
Focused WIL: Week June 24 - Work Integrated Learning
Focused WIL: Week July 1 - Work Integrated Learning

Class 10 - Review - Product Diagnostic with Instructor/Expert Feedback

Overview: Class 10 - July 15

Class Format

Review diagnostic and final questions
Key takeaways with Vincent Liu
One external reviewer (CPO)

Assigned Readings, Cases, etc.

None

Assigned work due

see canvas

Class 11 - Review - VC Diagnostic with Instructor/Expert Feedback

Overview: Class 11 - July 22

Class Format

Review diagnostic and final questions
Key takeaways with Matthew Lombardi
One external reviewer (Founder/VC)

Assigned Readings, Cases, etc.

None

Assigned work due

VC Diagnostic Report - due July 18th at 10am

Focused WIL Week: Students Present to Startup Teams

Overview: Focused WIL Week - Week of July 22nd

Students present work to startup teams for feedback and discussion (without Instructors present)

Class 12 - Final Class Presentations

Overview: Class 12 - July 31

Class Format

Report presentation
- Venture readiness (company) SWOT analysis
- Venture readiness (product) SWOT analysis
- Data room review
- Venture tour recommendations

Assigned Readings, Cases, etc.

None

Assigned work due

Final Presentations

Class Celebration

Overview: Class Celebration

- Evening of August 1st at OneEleven.
- All Instructors, students, companies (invited), plus special guests
- Opportunity to celebrate the conclusion of Schulich Venture Studio - cohort 1

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

Preparation

You are expected to be in class and participate in the discussions. You must show that you have prepared yourself for class by having seriously thought about the materials and subject matter and read the bios of guest speakers, prepared questions for guest lecturers, and made any other recommended preparations based on the course outline.

You should be prepared to make contributions from your own background. The innovative nature of this course requires that you be creative and think outside the box.

The mentor evaluation grade will be a combined evaluation from both team mentors on the quality and quantity of your individual contributions to the team meetings with each mentor.

Class Participation (contribution)

An individual's class participation grade will be the instructor's evaluation of the quality and quantity of your individual contributions to class discussions both verbally and through the chat. The class participation grade will be significantly lower for those who repeatedly show up late to class or do not attend. Active participation through commenting and replying on Canvas and LinkedIn posts related to this class will also contribute to participation grades.

GENERAL SCHULICH ACADEMIC POLICIES

Grading

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1. Elective courses are expected to have a mean grade between 5.2 and 6.2.
The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor.
For more details on the index, grading policy, and grade point average (GPA) requirements, consult your student handbook.

Academic Honesty

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

Accommodations

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

Exams (Absence from)

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

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

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

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

Visiting Campus

All York community members share in the responsibility of keeping others safe on campuses, and to uphold professional and respectful interactions with one another. In this class, as elsewhere on campus, students must comply with all University health and safety regulations or protocols, including the following:

- Do not attend in-person activities at any of York University's campuses/locations when you are feeling unwell. Please complete a self-assessment on YU Screen to receive support from a member of the University's case and contact management team.
- Wear a high quality, snugly fitting mask that completely covers the mouth, nose, and chin in all indoor spaces on campus
- Do not eat or drink in instructional spaces, including research and shared spaces (e.g., Libraries), unless for urgent health reasons.

More Information about COVID-19 health and safety measures can be found on the **Better Together (https://www.yorku.ca/bettertogether/)** website.

Encouraging a Community of Care

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

Student Rights and Responsibilities

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

The Schulich School of Business strongly supports and adheres to the **Code of Student Rights and Responsibilities (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)** . All students have rights and responsibilities as outlined in this document and are expected to uphold the identified values for the benefit of the entire community.

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

Take time to fully review the Code of Student Rights and Responsibilities: https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/ (https://schulich.yorku.ca/code-of-student-rights-and-responsibilities/)

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

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

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

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Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Adam Diamant, OMIS Area Faculty and Area Coordinator
Date: October 23, 2025
Re: Motion Regarding Course Name Change and Credit Changes for Courses in the Tech MBA

Motion: Rename OMIS 6640 from *Realizing Value from AI and Analytics in Organizations* to *Leveraging AI in Organizations.*

Ratione: The decision to rename OMIS 6640 is intended to provide a clearer title that better reflects the primary focus of the content. The new title aligns with contemporary terminology in industry, making the course more recognizable and accessible to students and employers.

Motion: Change the following course from 3.00 credits (current) to 1.50 credits (proposed):
Leveraging AI in Organizations (OMIS 6640)

Rationale: The decision to reduce the credit value of this course is aligned with the redesign of the Tech MBA curriculum. While the above course provides important, practice-oriented knowledge, its intended learning outcomes can be achieved through shorter time frame through a more focused delivery. By resizing this course, we ensure that students continue to gain essential exposure to core competencies while creating capacity for new content areas that reflect the evolving demands of technology-focused management education. The new outline for the above course is attached, and this motion has full support from both the OMIS area and the Tech MBA program director. The specified change is planned to take effect starting Fall 2026.

Schulich
School of Business
York University

Course Change Proposal Form
Schulich School of Business

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

1. **Responsible Program:**
   Schulich Tech MBA

2. **Responsible Unit:**
   OMIS

3. **Subject Code (Rubric) and Course Number:**
   OMIS 6640

4. **Credit Value:**
   3.0

5. **Long Course Title:**
   Realizing Value from AI and Analytics in Organizations

6. **Short Course Title:**
   Realizing Value from AI & Analytics

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

	in course number
X	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):**

Summer 2027

9. Rationale:

This is a required course in the Tech MBA Program.

The decision to rename OMIS 6640 is intended to provide a clearer title that better reflects the primary focus of the content. The new title aligns with contemporary terminology in industry, making the course more recognizable and accessible to students and employers.

The decision to reduce the credit value of this course is aligned with the redesign of the Tech MBA curriculum. While the above course provides important, practice-oriented knowledge, its intended learning outcomes can be achieved through shorter time frame through a more focused delivery. By resizing this course, we ensure that students continue to gain essential exposure to core competencies while creating capacity for new content areas that reflect the evolving demands of technology-focused management education. The new outline for the above course is attached, and this motion has full support from both the OMIS area and the Tech MBA program director. The specified change is planned to take effect starting Fall 2026.

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):
OMIS 6640 ~~3.0 Realizing Value from AI and Analytics in Organizations~~ ~~Technology is at the heart of all business. There is very little that goes on in any organization that does not rely on technology to run well or drive the business forward, you might say that more and more "technology is the business". As a key emerging technology, Artificial Intelligence (in particular GenAI) is becoming more and more important to enable the business strategy. Companies that excel in this discipline thrive and create new value for their organization and customers.~~ ~~The course makes the link between the practice of data science and the value delivered to organizations. The course will provide the tools and frameworks to lead informed, strategic decision-making processes, and augment business performance by integrating key AI management and leadership insights into the way your organization operates. This course will bridge the divide between the data scientists and the senior management of the organization, enabling data scientists to develop and sell their ideas into the organization, change the way the organization does business, and enable their organization to realize value for their investments in data and AI.~~	OMIS 6640 1.5 Leveraging AI in Organizations Technology now powers nearly every aspect of organizational success—today, **technology *is* the business**. Among emerging technologies, Artificial Intelligence, especially Generative AI, has become a critical driver of strategy, innovation, and value creation. This course connects the practice of data science to strategic business outcomes. Participants will learn frameworks and leadership approaches to make informed, data-driven decisions, unlock performance improvements, and integrate AI effectively into organizational strategy. The course also bridges the gap between data teams and senior leadership, equipping participants to champion AI initiatives, influence decision-makers, and ensure organizations realize meaningful value from data and AI investments.

11. Enrolment Notes:

Tech MBA Students and potentially MBA students.

***12.* Consultation:**

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

taken place.

Originator:

Signature	Date
Murat Kristal	MBAT
Name	Area or Specialization

Approvals:

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

Signature	Date
Murat Kristal	MBAT
Name	Area or Specialization

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

Signature	Date

Schulich
School of Business
York University

Name of Program Director	Program

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

Kevin Tasa	November 20, 2025
Signature	Date
Kevin Tasa	Master Programs Committee
Name of Committee Chair	Committee

OMIS 6640 1.50: Leveraging AI in Organizations

Course Outline
Summer 2027 – Section M - Semester 3 of Tech MBA

Time: Tuesday – 6:30-9:30pm

In Person at:
The Miles Nadal Management Centre (Downtown Toronto), East Tower Toronto Dominion Centre, Suite 500 – 222 Bay St Toronto ON M5K 1K2.

Instructor
Name: Dr. David Markwell
Mobile Phone #: 1.416.571.9708
Email:david.markwell@loblaw.ca (preferred) &
dm163@schulich.yorku.ca

Course Overview

Technology is at the heart of all business. There is very little that goes on in any organization that does not rely on technology to run well or drive the business forward, you might say that more and more "technology is the business". As a key emerging technology, Artificial Intelligence (in particular GenAI) is becoming more and more important to enable the business strategy. Companies that excel in this discipline thrive and create new value for their organization and customers.

The course makes the link between the practice of data science and the value delivered to organizations. The course will provide the tools and frameworks to lead informed, strategic decision-making processes, and augment business performance by integrating key AI management and leadership insights into the way your organization operates. This course will bridge the divide between the data scientists and the senior management of the organization, enabling data scientists to develop and sell their ideas into the organization, change the way the organization does business, and enable their organization to realize value for their investments in data and AI.

This is my nineth time teaching this course, so you will have the benefits of my test and learn strategies from the preview sessions to have an even more beneficial experience. Some of the previous sessions were also virtual on Zoom, so we will work together to make this summer term even more engaging as we are together in the classroom for three hours a week on a Tuesday evening. The change this year is that the course has been compressed to 6-weeks, so we will

have an intense but rewarding 6 weeks as we dig into creating value for organizations through AI and Analytics.
Prerequisite(s): NONE

Course Learning Outcomes

After completing this course, students should be able to:

- Explain how to gain strategic advantage using Artificial Intelligence
- Explain the categories of business problems and the appropriateness of each class of AI techniques
- Craft a story to sell your ideas
- Explain the enablement processes: pilots, business cases, data acquisition and delivery of AI projects
- Demonstrate the Financial Management require to enable AI projects and teams
- Develop Change management strategies that reflect the impact of AI on the organization
- Design Data Privacy, Security and Consent into your AI projects
- Develop a strategic AI roadmap for your organization

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
Assignments	1	20	20	Individual
Group Projects	2	20	40	Group
Final Exam	1	40	40	Individual
			100%	

For details, see "Written Assignments/Projects and Exam[s]: Descriptions"

Course Material

Required Materials:

All required articles will be posted on the course website.

Textbooks – for background reading only:

Human and Machine: Reimagining Work in the Age of AI, P. Daugherty & J. Wilson, HBR Press (2018).

The Course Materials Database (CMD) has been created within Schulich's Canvas learning environment. It contains general information for Schulich students and information and materials specific to this course. Check it frequently.

Student Preparation for Class and Class Participation: Expectations

Preparation. Students should come prepared to class having read the assigned materials and with any pre-work completed as indicated in the Course Materials Database (CMD) - Canvas and are expected to contribute throughout the term during in-class discussions and presentations; however, there are no participation marks.

Class-by-Class Syllabus

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

Note: If any changes in this schedule become necessary, notifications will be posted in the Announcements section on the course CMD, and when changes need to be announced between classes, an email will be sent to students' yorku email accounts, notifying them of the change.

WEEK	TOPIC(S)/ASSIGNED READING(S)/ASSIGNED WORK DUE
Week #1	Overview of the syllabus, expectations for the course. Group formation - Each week a group will present an analysis of an AI use case in use in industry (the first time - one they find described in use, the second time - one they propose for an organization) and submit a two-page summary. These two assignments will constitute part of the group assessment of the course. Schedule to be published during week 1 class. Lecture - Strategy and AI as an Enabler – Defining Internal and External Value in Organization and Human and Machine – Which work is best suited for each, and where they can collaborate (like a co-pilot).
Week #2	Group Presentation. Lecture – Types of business problems and how Analytics and AI can help solve them Part 2 of Lecture – Storytelling as it relates to framing a problem
Week #3	Group Presentation. Written Group Assignment Due at the start of class. Lecture – Data Acquisition, Cleansing and Operational Data Governance
Week #4	Group Presentation.

WEEK	TOPIC(S)/ASSIGNED READING(S)/ASSIGNED WORK DUE
	Lecture – Enabling AI Projects: pilots, business cases, delivery of AI projects, and, Financial Management of AI Projects and Benefits Tracking
Week #5	**Group Presentation.** **Lecture –** Preparing the Organization for AI and the Future of Work, and, Developing an Analytics and AI roadmap for your organization
Week #6	**Written Individual Assignment Due at the start of class.** **Lecture –** Data Privacy, Security and Consent + Ethical use of AI and checking models for bias.
	Final Exam

Written Assignments/Projects and Exam[s]: Descriptions

Due Date	
Week 6	Individual Assignment The individual assignment requires students to leverage the frameworks discussed in the class and apply them to an organizational context to achieve a strategic outcome. The readings and prior lectures provide all the information students need to complete the assignments. Students must submit assignments at the beginning of the lecture session on the due date. ***Value: 1 x 20% = 20%***
Weeks 2-5	Group Projects Students need to form project teams – 8 groups Each week two groups will present an analysis of an AI use case in use in industry to the class and submit a two-page summary in their assigned weeks. Presentation – Find an AI use case from industry and describe it ***Value: 2 x 20% = 40%***
Week 3	Each group will research an example of a Human and Machine AI interaction and discuss why this relationship is effective. How can AI be our co-pilot? Requirement is to submit a two-page report. ***Value: 1 x 20% = 20%***

Due Date	
Final Exam Schedule	Final Exam The material for the final exam incorporates all the materials discussed in the course and will involve an open-book case analysis. The exam will take place at a time and place to be announced. **Value: 40%**

Evaluation of Written Assignments/Projects and Exams

Mark breakdowns for individual assignment are as indicated with the assignments themselves.

Late Delivery: The students will lose 5% of their assignment grade for every day an assignment is delayed.

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

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1

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

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

http://www.schulich.yorku.ca/client/schulich/schulich_lp4w_lnd_webstation.nsf/page/Enrolment+Grades+and+Convocation!OpenDocument#tabs-2

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

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

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

Exams (Absence from)

Final. Within 24 hours of missing a final examination, students must contact the Director of Student Services at (416) 736-5060 and must also contact their course instructor. Formal, original documentation regarding the reason for missing the exam must be submitted to the Director of Student Services (SSB Room W262) within 48 hours of missing the final exam. Students who miss a final exam due to illness must have their doctor complete an "Attending Physician's Statement." For more details, see:

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

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Viswanath (Shanker) Trivedi, Program Director MAcc Program
Date: November 7, 2025
Re: Add a Blended Format of Course Delivery

Motion:

That Faculty Council approves the proposal to add a blended format of course delivery for the following courses in the Master program: ACTG 5101 3.0, ACTG 5211 3.0, ACTG 6120 3.0, ACTG 6140 3.0, ACTG 6710 3.0.

Rationale:

The graduate accounting courses have been delivered, with permission, in a blended format in Summer 2025/Fall 2025. This was in response to students' requests, particularly for the lab component of the courses, which compromises 1/3 of the course delivery to be delivered online. We asked for feedback from students and instructors, and all were overwhelmingly positive, as evidenced by the increase in class attendance that is now over 95%. The change in teaching mode has been facilitated by consideration of the content taught in the online versus in the in-person components of the course, which is in in recognition of the appropriateness of the delivery mode for different types of content, and also, we have slightly revised our course evaluations to encourage and motivate students to attend and participate in the online delivery mode. Learning outcomes have not been altered.

We are requesting formal adoption of the revision of the teaching mode to add a blended format, as given the feedback from students and instructors, we believe we can teach a more valuable course by combining in-person instruction with synchronous and asynchronous delivery. Although we are still gaining insight into the best use of the respective modes, we believe that an integration of online and in-person teaching facilitates the use of the most appropriate mode of delivery for different types of content and interaction. Firstly, what we have learned is that interactive components, such as case study discussions, are better delivered in person, as is the primary delivery of many of the foundational theoretical content. However, the technical accounting applications appear to be better absorbed by students through synchronous online sessions that better facilitate the absorption of material by students than in traditional in-class settings.

In conclusion, taking the course forward in a blended[1] format will allow us to provide the students with the best possible learning experience and to further experiment with different contents, formats, and techniques for students' engagement. It also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

[1] Blended learning is defined by York University as follows: "At least a third of the course will be delivered online and a third face-to-face, the remaining third may be any combination of online or face-to-face."

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Course Change Proposal Form

Schulich School of Business

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

1. **Responsible Program:**
   Schulich Graduate Program

2. **Responsible Unit:**
   ACTG

3. **Subject Code (Rubric) and Course Number:**
   ACTG 5101
   ACTG 5211
   ACTG 6120
   ACTG 6140
   ACTG 6710

4. **Credit Value:**
   3.00

5. **Long Course Title:**
   Financial Accounting Fundamentals
   Management Accounting Fundamentals
   Intermediate Financial Accounting I
   Intermediate Financial Accounting II
   Introduction to Income Taxation

6. **Short Course Title:**
   Financial Accounting Fundamentals
   Management Accounting Fundamentals
   Intermediate Financial Accounting I
   Intermediate Financial Accounting II
   Introduction to Income Taxation

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

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

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

Fall 2026

9.

Rationale:

The graduate accounting courses have been delivered, with permission, in a blended format in Summer 2025/Fall 2025. This was in response to students' requests, particularly for the lab component of the courses, which compromises 1/3 of the course delivery to be delivered online. We asked for feedback from students and instructors, and all were overwhelmingly positive, as evidenced by the increase in class attendance that is now over 95%. The change in teaching mode has been facilitated by consideration of the content taught in the online versus in the in-person components of the course, which is in in recognition of the appropriateness of the delivery mode for different types of content, and also, we have slightly revised our course evaluations to encourage and motivate students to attend and participate in the online delivery mode. Learning outcomes have not been altered.

We are requesting formal adoption of the revision of the teaching mode to add a blended format, as given the feedback from students and instructors, we believe we can teach a more valuable course by combining in-person instruction with synchronous and asynchronous delivery. Although we are still gaining insight into the best use of the respective modes, we believe that an integration of online and in-person teaching facilitates the use of the most appropriate mode of delivery for different types of content and interaction. Firstly, what we have learned is that interactive components, such as case study discussions, are better delivered in person, as is the primary delivery of many of the foundational theoretical content. However, the technical accounting applications appear to be better absorbed by students through synchronous online sessions that better facilitate the absorption of material by students than in traditional in-class settings.

In conclusion, taking the course forward in a blended1 format will allow us to provide the students with the best possible learning experience and to further experiment with different contents, formats, and techniques for students' engagement. It also conforms to a call by York's Associate Vice President Teaching and Learning for blended course to "become a common and accepted approach for course delivery at York."

10. Proposed Course Information:

Existing Course Information (Change From):	Proposed Course Information (Change To):
Mode of delivery: in person	Mode of delivery: in person, blended

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

11. Enrolment Notes:

n/a

12. Consultation:

n/a

Originator:

Signature	October 29, 2025 Date
Shanker Trivedi Name	ACTG Area or Specialization

[1] Blended learning is defined by York University as follows: "At least a third of the course will be delivered online and a third face-to-face, the remaining third may be any combination of online or face-to-face."

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Approvals:

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

Signature	October 29, 2025 Date
Linda Thorne Name	ACTG 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	Program

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

Kevin Tasa Signature	November 20, 2025 Date
Kevin Tasa Name of Committee Chair	Master Programs Committee Committee

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, November 14, 2025** from **11:30am – 1:00 pm**.

MINUTES

In Attendance:

Chair: W. Shen

Vice-Chair: vacant

Secretary: K. Doyle

Assistant: S. Hyde (absent)

Voting Members of Faculty Council Present:

Senior Admin	D. Zwick, K. Tasa, A. Joshi,
ACTG	M. Bamber, S. Hsu, K. Kanagaretnam, A. Mawani, L. Thorne, V. Trivedi
ARTM	
ECON	A. Bhanich-Supapol
ENTR	
FINE	M. Dong, P. Foroughi, M. Kamstra, Y. Larkin, A. Rzeznik, Y. Tian
MKTG	A. Joshi, T. Noseworthy, G. Packard, M. Veresiu, D. Zwick
MREI	
ORGS	C. Bell, I. Hideg, W. Shen, K. Tasa, L. Zhu
OMIS	I. Bicer, A. Diamant, D. Johnston, H. Kim, M. Levesque, G. Li, D. Oppong-Tawiah
PLCY	P. Aulakh, M. Kipping, C. McMillan, T. Peridis, W. Sheremata, O. Weber
PROP	
SUST	C. Cho, B. Eberlein, G. Kistruck, M. Valente
Voting CPM's & Director of 601	I. Holzinger, J. Yeung Do
Student Reps	N. Nandal (GBC), R. Nguyen (UBS), S. Pimenta (UBS)

Voting Members of Faculty Council Absent:

M. Annisette	D. Dimick (ret.)	P. Laycock (Alum)	R. Phillips	L. Wright (ret.)
E. Auster	J. Everett	F. Lazar	E. Prisman	J.S. Yeomans

K-H. Bae	M. Farjoun	A. Liann (Lib. Rep.)	A. Rahaman	J. Zemans (ret.)
T. Beechy (ret.)	E. Fischer	B. Lyons	M. Rice	
R. Belk	B. Gainer	I. Macdonald (ret.)	L. Rolheiser	
M. Biehl	M. Giesler	A. Madhok	H. Rosin (ret.)	
A. Campbell	C. Graham	A. Majzoubi	G. Saxton	
M. Cao	T. Gupta (GBC)	D. Matten	R. Shao	
M. Chowdhury (UBS)	I. Henriques	J. McKellar	D. Sikri (UBS)	
J. Clayton	D. Horvath (ret.)	R. McLean	X. Su	
W. Cook (ret.)	C. Huang (PH.D)	M. Milevsky	J. Tan	
A. Coutts	M. Hussain (GBC)	G. Morgan (ret.)	T. Tandon (GBC)	
P. Darke	R. Imanirad	D. Neu	M. Voronov	
J. Darroch	R. Irving (ret.)	L. Ng	S. Weiss	
A. DeCarufel (ret.)	R. Karambayya (ret.)	C. Oliver (ret.)	T. Wesson (ret.)	
Y. Deutsch	A. Kecskes	L. Pan	E. Westney (ret.)	
A. Devine	M. Kristal	Y. Pan	B. Wolf (ret.)	

Leaves and Sabbaticals:

	M. Farjoun	J. Rungtusanatham		

Non-Voting Members of Faculty Council Present

C. Carder	C. Hardman	D. Mak	C. Sicoli
K. Doyle	I. Holzinger	Y. Massop	N. Sutherland
S. Friedman	B. Kha	C. Niederwanger	F. Zandi
C. Gray	S. Kerr	L. Pan	M. Zelver

Non-Voting Members of Faculty Council Absent:

B. Abtan	D. Elsner	L. Lee	G. Pau	A. Visram
W. Al-Hussaini	J. Fayt	D. Lennox	S. Penwarden	A. Volodina
N. Alexandrian	A. Ferreira	R. Lynn	J. Pinto	P. Walker
S. Babra	A. Fisher	P. Macdonald	P. Pivato	M. Waxman
D. Barret	B. Gallagher	N. Machado	J. Pokrajac	A. Welsh
M. Bhutani	A. Garber	J. Mapa	S. Pulver	D. Woticky
S. Browne	S. Gargaro	D. Mak	C. Sachs	R. Young

K. Butzek-Morris	T. Gosse	R. Mayer	G. Sanchez Cuevas	W. Zhang
S. Calahan	J. Guo	T. McQueen	V. Shanmuganathan	C. Zhuang
M. Cernea	A. Harris	T. Medcof	C. Sicoli	
J.M. Clark	B. Hrehoruk	G. Milavsky	H. Sinker	
M. Collyer	C. Hui	M. Morriello	A. Sriharan	
M. De Luca	S. Hussain	C. Mueller	T. Stubbs	
L. De Wilde	V. Ivankine	K.R. Na	S. Thomas	
G. Deans	K. Kim	Z. Necas	A. Thomson	
P. Dillon	A. Konson	L. Pan	T. Tolias	
K. Elliot	H. Koren-Cohen	C. Partland	H. Turesson	
K. Ellis	L. Lakats	B. Pasquali	K. Vandezande	

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

Chair calls the meeting to order at 11:32 am and reads the land acknowledgement. Provides overview of the agenda.

2. **UBS, GBC, PhD Student Remarks** (10 minutes)

S. Pimenta provides an update on behalf of UBS. Students are preparing for final exams. The wellness team will be hosting an event with therapy dogs on November 26.

3. **Dean's Remarks** (10 minutes)

Dean Zwick provides remarks on:

- meeting with alumni network chapters in Dubai and India
- meeting with India Advisory Council while on a trip there with President Lenton recently
- a successful Schulich Giving Day thanks to the Advancement and Alumni Engagement team
- EMBA's achievement of #32 in the global rankings (with thanks to AD Matthias Kipping)
- Corporate Knights' ranking of Schulich's MBA as #1 in Canada in the area of sustainability (with thanks to Mike Valente for his work as program director)
- Isik's Bicer for his forthcoming book launch
- a team of Schulich MMAI students came first at a women in AI case competition for the project Mind Bloom

- Students will be competing at Copenhagen business school in a case competition
- Eva Lau received the honorary doctorate at our recent convocation
- The Alumni Recognition Awards
- Rick Waugh's book launch
- The signing of the dual degree with Esade in October, thanks to SSIR on their work on the dual degree proposals
- YSpace Network, an initiative to bring together various entrepreneurship hubs around the University and promote collaboration (congratulations to Chris Carder, the founder of the network)
- Experience Schulich coming up on November 15—prospective students like to speak with faculty. Please join if you can. Domestic student numbers continue to climb over the last three years—the program directors have been pivotal in the work they do to renew and expand their programs.
- Upcoming event to announce the 10 million dollar gift from the Krembil Foundation for the Robert Krembil Scholarship of Merit.
- Update on federal foreign student policy, amid a flurry of updates and announcements: federal government has a foreign student visa cap which will decrease again for undergraduate students. For graduate students, the federal government is implementing an expedited visa processing. We have had students not be able to join our programs because of slow visa processing considering the timing of our program intakes. Master's and PhD students are excluded from the caps. Graduate students will no longer require the provincial attestation letter. Federal government is committing to process visas within 14 business days.

4. **Question Period with the Dean** (20 minutes)

Council members ask questions regarding: what the Dean is most excited about for the School in the coming months, updates on the university budget, whether development of new master's programs is an option again in light of the changes to the international study permit caps.

5. **Update on Accreditation and Rankings Activity** (*M. Biehl*) (20 minutes)

M. Biehl provides an update on the activities of the ARU. Slides are included in the agenda package.

6. **Other Business**

7. **Adjournment**

Motion to adjourn M: K. Tasa s: M. Kamstra
Motion carries. Meeting adjourned at 12:50 pm

EXECUTIVE COMMITTEE
SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Executive Committee of Faculty Council for the 2024-25 academic year was held remotely (via Zoom) on Friday, October 31 at 11:30 am.

MINUTES

In Attendance:

Chair: W. Shen

Vice-Chair: TBD

Secretary: K. Doyle

Assistant: S. Hyde

Members of Executive Committee Present:

X. L. Busani (President, PhD)	**K. Tasa** (Associate Dean Academic; Chair, Master Programs Committee & Programs Coordinating Committee & EMBA Committee)
B. Eberlein (Director, BBA/iBBA; Chair, BBA/iBBA Committee)	**V. Trivedi** (Director, MAcc)
I. Hideg (Co-Chair, Community & Equity Committee)	**M. Valente** (Director, MBA)
A. Joshi (Associate Dean Programs, Nominating Committee)	**J. Yeomans** (Director, MBAN and MMAI)
M. Kipping (Associate Dean, EMBA; Director, EMBA)	**J. Yeung Do** (Executive Officer)
G. Packard (Director, MMKG)	**L. Zhu** (Chair, Community and Equity Committee; Director, MMgt)
S. Pimenta (President, UBS)	

Members of Executive Committee Absent/Regrets:

T. Arora (President, GBC)	**D. Johnston** (Director, MSCM)
M. Cao (Director, MF)	**K. Kanagaretnam** (Associate Dean Students; Chair, Masters Admissions Committee)
C. Cho (Co-Chair, Community & Equity Committee)	**M. Kristal** (Director, MBAt)
J. Clayton (Director, MREI)	**A. Mawani** (Director, MHIA)
P. Darke (PhD Program; Chair, PhD Committee)	**T. Noseworthy** (Associate Dean External Relations)

E. Fischer (Chair, Tenure & Promotions Committee) (Associate Dean Research; Chair, Research & Library Committee)	**D. Zwick** (Dean)
S. Hsu (Chair, Student Affairs Committee)	

1. Welcome & Chair's Remarks

Chair calls the meeting to order at 11:34 am.

2. Review of November Faculty Council Agenda and Documentation

Committee agrees by consensus on the proposed agenda.

3. Other Business

G. Packard raises issue for discussion of business schools relying on piecemeal/part-time instruction because of the number of complications it raises.

Committee discusses part-time instruction and the pedagogical and operational issues it creates.

The Chair adjourns the meeting at 11:52 am.