Schulich
School of Business
York University

FACULTY COUNCIL
SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Schulich Faculty Council for the 2026-27 academic year will be held via Zoom on **Friday, November 13, 2026** from **11:30am – 1:00 pm**.

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

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Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Luke Zhu, Associate Dean Program
Date: October 21, 2026
Re: Major Modification to Add a New Delivery Location for the Master of Business Analytics Program

Motion: That Faculty Council approve the major modification to add Renmin University of China's Zhongguancun Campus in Beijing, China, as an additional delivery location for the Master of Business Analytics (MBAN) program.

Rationale: The proposed Beijing location will extend access to Schulich's established MBAN program within one of China's leading higher-education, technology, and innovation ecosystems. The program's focus on analytics, data management, predictive modelling, machine learning, data visualization, and evidence-informed decision-making is well aligned with the needs of Beijing's data-intensive and technology-enabled sectors. The proposal supports York's commitment to expanding global connections and Schulich's objective of providing globally relevant, industry-connected management education. The MBAN will remain a York University program, with York retaining authority over admissions, curriculum, instructor approval, assessment, academic standards, quality assurance, student support, academic records, and degree conferral. Faculty Council approval is an initial step that will allow Schulich and Renmin to prepare and submit the program for assessment and approval by China's Ministry of Education; the proposal is grounded in a detailed assessment of academic, operational, and financial feasibility. The approval and implementation process will take time, during which the detailed arrangements will continue to be refined; should material circumstances change, Schulich will retain the ability to reconsider proceeding.

Major Modifications Proposal

Faculty: Schulich School of Business

Department: N/A

Program: Master of Business Analytics

Degree Designation: Master of Business Analytics

Type of Modification:

Add a delivery location for Master of Business Analytics (MBAN);

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

Proposed: Renmin University's Zhongguancun Campus, Haidian District, Beijing, China

It is currently offered at the Keele Campus of York University

Effective Date: Fall 2027

Approval Date at Faculty Council:

1. Overview

1.1 Provide a brief summary of the proposed changes to the program.

This proposal seeks approval for a major modification to add an international delivery location for Schulich's existing Master of Business Analytics (MBAN) program. The modification would enable York University to deliver the MBAN through Renmin University's School of Information at its Zhongguancun Campus in Beijing, China, while the program continues to be offered at York University's Keele Campus.

Under the proposed modification, the MBAN remains a York University program. York University will retain responsibility for academic standards, admissions, curriculum, Program Learning Outcomes, assessment, academic progression, academic records, quality assurance, student experience, and degree conferral. Approximately 50% of the teaching load will be delivered by instructors nominated by Renmin University and approved by York University in accordance with York's applicable qualification, appointment, and quality-assurance requirements; the remaining teaching will be delivered by York-appointed instructors.

The intended start date for delivery at the new location is September 2027, subject to completion of York's internal governance approvals and any required external regulatory approvals. The addition of the Beijing delivery location is classified as a major modification because it represents a significant change to the program's delivery, including the physical resources and campus context in which the MBAN is delivered.

1.2 Provide the rationale for the proposed changes.

The proposed addition of a delivery location at Renmin University's Zhongguancun Campus in Haidian District, Beijing, will extend the geographic reach of Schulich's established Master of Business Analytics program to one of China's leading concentrations of universities, research institutions, technology enterprises, and innovation activity. The modification will enable qualified students to complete the existing York University MBAN in China while meeting the same program requirements, academic standards, and graduation requirements that apply at York's Keele Campus.

There is a strong labour-market rationale for extending the MBAN to Beijing. The Zhongguancun area is closely associated with Beijing's role as an international science and technology innovation centre and brings together higher education, research, technology development, entrepreneurship, and industry. Its ecosystem includes information technology, artificial intelligence, digital services, financial technology, consulting, and other data-intensive sectors that require graduates with advanced capabilities in business analytics, quantitative methods, data management, predictive modelling, and evidence-informed decision-making.

This labour-market rationale is supported by written assessments from six senior technology and industry advisers. Collectively, they identified a continuing need for leaders who can connect technology, artificial intelligence, data, and analytics to strategy, operations, responsible innovation, and measurable business value. They noted that graduates with these capabilities are well positioned to lead digital transformation, translate advanced analytical and AI methods into sound managerial decisions, govern AI responsibly, and bridge technical specialists and business leaders. The assessments also emphasized the reciprocal value of learning from China's rapidly evolving technology, digital-payments, consumer-technology, and innovation environments. Advisers noted that graduates able to understand both Chinese and Canadian approaches to innovation could contribute to new products, companies, and employment in Canada, while cross-campus cases, faculty engagement, and collaboration could extend the benefits to students at Keele.

Renmin University's Zhongguancun Campus is an appropriate delivery location because it places the MBAN within Haidian District's established higher-education and technology environment. The School of Information's location at No. 59 Zhongguancun Street connects the program directly to an ecosystem in which education, research, technological innovation, and talent development are closely integrated. The MBAN's existing emphasis on quantitative

analysis, data management, predictive modelling, machine learning, data visualization, and evidence-informed managerial decision-making is well aligned with this data-intensive and technology-enabled environment.

Renmin University of China is a comprehensive research university directly administered by China's Ministry of Education. It was designated under both Project 211 and Project 985, the national initiatives that preceded the Double First-Class initiative. Project 211 was established to strengthen approximately 100 priority universities for the 21st century, while Project 985 selected an elite subset of those institutions for intensified investment and development toward world-class standing. Renmin's inclusion in both initiatives, and its later selection among the first institutions in the national Double First-Class initiative, reflects its longstanding position among China's leading universities. The University has 14 disciplines included in the Double First-Class initiative. Its School of Information has a longstanding record of education and research in computer science, information systems, data science, software engineering, and information security. The School supports doctoral and postdoctoral training and hosts Ministry of Education research platforms in database and business intelligence and in data engineering and knowledge engineering.

The proposed delivery location at Renmin University's Zhongguancun Campus also responds to a large and established market for postgraduate education in China. China's Ministry of Education reported 4.10 million postgraduate students in 2024, including 3.42 million master's students, with 1.19 million new master's entrants that year. Beijing alone enrolled approximately 518,000 postgraduate students, including more than 355,000 master's students, and admitted approximately 130,000 new master's students. These figures do not by themselves establish demand for this specific program, but they demonstrate the scale of the relevant graduate-student market in the proposed city and the capacity of Beijing's higher-education ecosystem to support advanced professional study.

The proposed MBAN also aligns with evidence about what prospective students value. Recent research on student mobility in China identifies employability, skills development, and return on investment as central considerations and recommends digitally oriented, high-value skills that remain relevant to employers. The MBAN directly addresses these priorities through advanced analytics, data management, predictive modelling, machine learning, data visualization, responsible use of data, and the translation of analytical findings into managerial decisions. The program offers qualified students access to an established York credential and curriculum without requiring relocation abroad, while situating their study within Beijing's higher-education, technology, and employer ecosystem.

Program-specific demand will be validated before launch rather than inferred solely from national or city-level indicators. Schulich and Renmin will use a documented demand study that includes prospective-student expressions of interest, information-session registrations and attendance, inquiries from qualified candidates, conversion from inquiry to application, applicant academic profiles, and feedback from relevant universities, employers, and

professional communities. The analysis will also compare the proposed offering with relevant analytics and management programs available to students in Beijing and assess the appeal of a York degree delivered locally. The approved business case will establish the minimum viable cohort and other applicable launch criteria. Recruitment targets and the decision to admit the first cohort will be assessed against those criteria using the results of the demand study and will not rely on national or city-level market size, expressions of interest, or untested enrolment assumptions alone.

1.3 Comment on the alignment of the program changes with Faculty and/or University academic plans.[1]

The proposed addition of a delivery location for the MBAN in Beijing aligns with York University's 2026–2030 University Academic Plan, Sustainability, Collaboration, Community. In particular, the proposal supports the Plan's principle of Expanding Global Connections, which commits York to broadening and deepening its global relationships, awareness, and interdependence with communities and institutions around the world. Delivering an established York graduate program at a carefully selected international location advances this objective by extending York's academic presence and building sustained relationships with students, institutions, and professional communities in China.

The modification also aligns with the Plan's commitments to forward-looking teaching and learning and to pathways for student success. The MBAN is a professionally oriented graduate program designed to develop advanced analytical, managerial, and data-driven decision-making capabilities. Adding a delivery location at Renmin University's Zhongguancun Campus will make this established York program accessible to qualified students within a major higher-education, technology, and innovation ecosystem, while maintaining the program's existing academic standards, admissions requirements, curriculum, and degree expectations.

The proposal is also consistent with York's Global Engagement and Internationalization Strategy, which emphasizes inclusive global and intercultural learning, stronger international partnerships, and the development of strategic relationships that enhance York's global profile and impact. The delivery-location model advances these priorities through a structured institutional relationship that supports local program operations while York retains responsibility for academic standards, admissions, curriculum, quality assurance, student experience, and degree conferral.

At the Faculty level, the modification supports Schulich's objective of offering globally relevant, industry-connected management education. The MBAN extends Schulich's strengths in analytics, quantitative analysis, technology-enabled decision-making, and professional

[1] This can include the 2020-2025 University Academic Plan, the 2023-2028 Strategic Research Plan, the UN Sustainable Development Goals (SDGs), A Framework and Action Plan on Black Inclusion, the Indigenous Framework for York University, and other Faculty plans and frameworks.

graduate education. The proposed location at Renmin University's Zhongguancun Campus provides an opportunity to bring this established program to students and professional communities in Beijing's leading higher-education and technology district without duplicating programs at York or altering the academic requirements of the degree.

1.4 Provide a detailed outline of the changes to the program.
Also include an appendix of the side-by-side comparison of the existing and proposed program requirements as they will appear in the Undergraduate or Graduate Academic Calendar. Indicate deletions with strikethrough text and additions with underline in a contrasting colour.

The proposed modification is limited to the addition of an international delivery location for Schulich's existing Master of Business Analytics program. The MBAN will be delivered through Renmin University's School of Information at its Zhongguancun Campus in Beijing, China, while continuing to be offered at York University's Keele Campus.

The modification does not create a new program, degree, field, stream, specialization, or credential. It does not change the existing curriculum, course requirements, credit requirements, Program Learning Outcomes, admission requirements, assessment framework, degree requirements, or academic standards of the MBAN.

Students admitted at the Beijing delivery location will be admitted to York University's MBAN and will complete the same approved program requirements as students in the corresponding Keele-based program. York University will retain responsibility for academic standards, admissions, curriculum, Program Learning Outcomes, instructional delivery, assessment, quality assurance, student experience, academic progression, academic records, and degree conferral. The program will continue to be delivered through structured, in-person graduate instruction using York-approved course content, learning activities, course outlines, and assessment requirements.

York University will retain responsibility for instructional quality and academic oversight. In accordance with the approved staffing plan, approximately 50% of the teaching load will be delivered by instructors nominated by Renmin University and approved by York University in accordance with York's applicable qualification, appointment, and quality-assurance requirements. The remaining teaching will be delivered by York-appointed instructors. All instructors will teach York-approved courses and will be subject to the same approved course outlines, learning materials, assessment requirements, grading standards, academic-integrity expectations, and quality-assurance processes. Renmin University's School of Information will provide the physical delivery site and local logistical support necessary for delivery at the Zhongguancun Campus in Beijing. For clarity, all individuals teaching York MBAN courses at the Beijing location will require York approval through the applicable University and Schulich processes. References in this proposal to "Renmin-nominated instructors" identify the source

of nomination only and do not confer independent instructional authority on the host institution.

York University will maintain direct academic-quality oversight through its established academic governance and program-quality processes. The same York-approved curriculum, course requirements, Program Learning Outcomes, teaching expectations, assessment standards, grading practices, academic-integrity requirements, academic-progression requirements, and graduation requirements will apply to all students. York and Schulich will approve instructor assignments before delivery; provide instructors with the applicable York course, assessment, grading, and academic-integrity requirements; and monitor course delivery, student progression, academic performance, assessment outcomes, and student feedback.

Students at the Beijing location will have access to York University and Schulich academic and administrative processes through a documented service-delivery model rather than through a general assurance of identical access. Before recruitment begins, Schulich will identify, for each required service, the accountable York office, any local support role, hours and method of access, escalation route, and necessary location-specific adaptation. The model will cover academic advising, registration and records, accommodations, examination deferrals, academic integrity, grade-related processes, progression, appeals, library and database access, information technology, career services, wellbeing and emergency referrals, complaints, and graduation clearance. Renmin's designated on-site personnel may provide orientation, classroom information, logistical assistance, and referral to the appropriate York or Schulich office, but will not make academic or administrative determinations on York's behalf. Time-zone, language, accessibility, privacy, and local-service availability will be addressed in the implementation plan.

Renmin University will provide the physical delivery site through its School of Information at the Zhongguancun Campus, designated operational support, and instructors nominated for York's consideration under the approved staffing plan. York University will retain all decision-making authority over curriculum, admissions, instructor approval, assessment standards, academic standing, official records, appeals, quality assurance, and degree conferral. Before recruitment or admission begins, Schulich will complete a York-led host-site review of the proposed delivery location. The review will assess the local institutional and regulatory context; classrooms and instructional technology; administrative facilities; analytics-specific learning resources; accessibility arrangements; examination and assessment conditions; student-service access; and operational readiness. The review will document the methodology and evidence considered, findings, any conditions requiring resolution, and approval by the appropriate York authority.

The additional delivery location is intended to begin in September 2027, subject to completion of York University's internal governance approvals and any required external regulatory approvals. Because the modification pertains exclusively to delivery location, it does not

require substantive amendments to the existing Graduate Academic Calendar requirements for the MBAN. No changes to the existing MBAN program requirements in the Graduate Academic Calendar are proposed.

Implementation conditions. Approval of this major modification authorizes the addition of Beijing as a delivery location but does not, by itself, authorize recruitment, admission, or program delivery. Before recruitment and admission to the Beijing location begin, Schulich will confirm that all required University and external regulatory approvals have been obtained; the governing agreement with the host institution has been executed through the applicable University processes; any conditions arising from the host-site review have been resolved; the instructor appointment and oversight, academic-equivalence and assessment, student-service and escalation, experiential-learning, technology and data-governance, and student-continuity arrangements have been finalized; required instructional technologies, analytics software, computing resources, databases, and student-support arrangements have been tested and verified; and the final business case has received the required University and Faculty approvals. Program delivery will not commence unless these conditions have been satisfied.

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

The proposed modification will not affect students currently enrolled in the MBAN program at York University's Keele Campus. Those students will continue to complete the program requirements, courses, assessments, academic progression requirements, and graduation requirements in effect at the time of their admission, consistent with York University policies and the Graduate Academic Calendar.

The proposed change adds a delivery location only; it does not alter the existing curriculum, Program Learning Outcomes, credit requirements, admission requirements, assessment framework, degree requirements, or academic standards of the MBAN. Accordingly, no transition arrangements, substitutions, or changes to students' plans of study are required for currently enrolled students.

Students admitted to future cohorts at the Beijing delivery location will be admitted directly to York University's MBAN and will complete the same approved program requirements and meet the same academic standards as students in the corresponding Keele-based program. The addition of the Beijing location will therefore not displace, restrict, or otherwise adversely affect access to courses, academic supports, or progression for students currently enrolled at Keele.

2. Learning Outcomes and Program Requirements

2.1 List the current and/or updated Program Learning Outcomes for the proposed modified program.[2]

The proposed modification concerns the addition of a delivery location only. It does not change the existing Program Learning Outcomes of the Master of Business Analytics. Students admitted at the proposed Beijing location will be expected to achieve the same Program Learning Outcomes as students enrolled in the MBAN at York University's Keele Campus. York University will retain responsibility for the program's curriculum, Program Learning Outcomes, instructional delivery, assessment, academic standards, and degree conferral.

The current Program Learning Outcomes for the MBAN are therefore reproduced below without amendment. The Program Learning Outcomes will continue to be achieved and assessed through the existing approved program structures, courses, learning activities, and assessment practices.

Graduates of the MBAN will be able to:

- Apply advanced quantitative, statistical, and computational methods to identify, structure, analyze, and interpret complex business problems.
- Acquire, clean, manage, and analyze data using appropriate analytical tools, techniques, and technologies.
- Develop and evaluate predictive, descriptive, and prescriptive analytical models to support evidence-informed managerial decision-making.
- Assess the assumptions, limitations, ethical implications, and potential risks associated with data sources, analytical methods, models, and recommendations.
- Translate analytical findings into clear, actionable, and contextually appropriate business insights and recommendations.
- Communicate analytical processes, findings, visualizations, and recommendations effectively to technical and non-technical audiences.
- Collaborate effectively in diverse, interdisciplinary, and professional teams to complete data-informed business projects.
- Apply professional judgment and demonstrate responsible, ethical, and accountable practice in the use of data and analytics.
- Integrate business knowledge with analytical expertise to address organizational challenges in areas such as finance, marketing, operations, supply chains, and technology.

[2] 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.

- Demonstrate the capacity for independent learning and continued professional development in rapidly evolving analytical methods, technologies, and business contexts.

2.2 If applicable, describe and/or map how your Program Learning Outcomes map onto Ontario's Degree Level Expectations.
A suggested template for mapping can be found as an attached appendix.

Not applicable. The proposed modification adds a delivery location only and does not revise the existing Program Learning Outcomes for the MBAN. Accordingly, the program's existing alignment with the Ontario Degree Level Expectations remains unchanged, and no revised PLO-to-DLE mapping is required.

2.3 If applicable, describe and/or map how courses map onto to the Program Learning Outcomes.
A suggested template for curriculum mapping can be found as an attached appendix.

Not applicable. The proposed modification does not change the approved curriculum, course requirements, or Program Learning Outcomes. Existing course-to-PLO curriculum maps therefore remain unchanged, and no revised curriculum mapping is required.

2.4 If applicable, describe how the proposed modifications will support the achievement of Program Learning Outcomes.

The proposed modification will support continued achievement of the existing MBAN Program Learning Outcomes by enabling delivery of the established York University program in an appropriate, in-person academic setting in Beijing. The modification does not change the program's curriculum, course requirements, credit requirements, Program Learning Outcomes, assessment framework, admission requirements, or academic standards. Students at the additional delivery location will therefore be expected to achieve the same Program Learning Outcomes as students enrolled in the MBAN at York's Keele Campus.

The Beijing delivery location will support the approved learning activities through which students develop and demonstrate the program's existing outcomes. These activities include faculty-led instruction, applied quantitative analysis, analytics and modelling exercises, case-based learning, individual and team assignments, presentations, collaborative problem solving, and course-level assessment. Students will also complete the existing experiential-learning component, which requires the application of analytical methods to a real organizational problem and the preparation and presentation of an experiential-learning report.

The experiential-learning component for the Beijing cohort will operate under a model approved by Schulich. Schulich will retain authority to approve project scope, learning objectives, supervision, assessment, confidentiality, data-use, intellectual-property, and academic-integrity requirements. Renmin's designated personnel may assist with identifying prospective client organizations and coordinating local logistics, but projects and clients will be vetted and approved through Schulich processes. Each project will have an identified academic supervisor, clear arrangements for access to data and technology, and agreements addressing confidentiality, ownership and permitted use of intellectual property, privacy, and permitted data storage and transfer. If a suitable external client project is unavailable, Schulich will provide an approved contingency project that permits students to meet the same learning outcomes and assessment requirements. Project quality and outcomes will be included in the annual cross-location review. The annual cross-location review will compare the scope, academic complexity, supervision, assessment outcomes, student experience, and evidence of Program Learning Outcomes associated with experiential projects at Beijing and Keele to identify and address material differences in academic quality.

York University will retain responsibility for the academic conditions necessary for achievement of the Program Learning Outcomes. The same York-approved curriculum, course outlines, instructional expectations, learning materials, assessment requirements, grading standards, academic-integrity requirements, and graduation requirements will apply at the Beijing location as at Keele. Instructors delivering the program, including instructors nominated by Renmin University, will be approved through York's applicable staffing and quality-assurance processes.

The York-led host-site review will assess whether the Beijing site has the instructional facilities, technology, learning resources, and student-access arrangements needed to support the approved delivery model. Any conditions identified through the review must be resolved, and final operational readiness confirmed by the appropriate York authority, before recruitment or admission begins. Schulich will monitor course delivery, student progress, academic performance, assessment outcomes, and student feedback as part of ongoing program oversight. Where concerns arise regarding instructional quality, assessment, student support, or local delivery conditions, York will address them through the appropriate academic and administrative processes.

The addition of the Beijing delivery location will therefore extend access to the existing MBAN program without altering the learning outcomes students must achieve or the academic standards through which those outcomes are attained and assessed.

2.5 If applicable, describe how the achievement of the Program Learning Outcomes will be assessed and how that assessment of the Program Learning Outcomes will be documented.

The proposed modification will not change how the MBAN assesses or documents achievement of its Program Learning Outcomes. Students at the Beijing delivery location will complete the same York-approved courses, learning activities, and assessment requirements as students in the MBAN at York's Keele Campus. Assessment methods will continue to be set out in approved course outlines and may include examinations, individual and team assignments, case analyses, applied projects, presentations, quantitative exercises, analytics and modelling exercises, and other forms of assessment aligned with relevant course learning outcomes and Program Learning Outcomes.

York University will retain responsibility for the integrity, consistency, and academic standards of assessment at both delivery locations. Each course offered in Beijing will have a designated York academic lead responsible for confirming the approved course outline, learning objectives, assessment design, grading rubric, academic-integrity controls, and grade-approval process. Assessments need not be identical in every instance, but they must be demonstrably comparable in scope, level, and alignment with the course and Program Learning Outcomes. Schulich will use assessment moderation, review of grade distributions and student outcomes, and, where appropriate, common rubrics, second review, or comparative sampling of assessed work to identify and address material differences across locations. Final grades and all determinations concerning academic integrity, progression, appeals, and graduation eligibility will remain subject to York authority and York policies. On-site personnel may facilitate communication or provide logistical assistance but will not make academic determinations on York's behalf.

Achievement of Program Learning Outcomes will continue to be documented through York University's established academic processes. These include course-level assessment records, final grades, academic-progress records, completion of program requirements, official transcripts, and graduation-clearance processes. York will retain responsibility for maintaining official academic records, determining whether students have met the academic requirements for progression and graduation, and confirming eligibility for degree conferral.

Program-level monitoring will include an annual cross-location quality report prepared under the authority of the MBAN Program Director and reviewed through Schulich's established academic quality-assurance processes. The report will compare admissions profiles, course delivery, instructor qualifications, technology and learning-resource issues, assessment outcomes and grade distributions, progression and attrition, academic-integrity cases, student feedback, experiential-learning quality and outcomes, evidence of Program Learning Outcome achievement, and corrective actions across Beijing and Keele. Significant differences between locations will be investigated to determine whether they reflect legitimate cohort or delivery differences or require academic or operational remediation. Material concerns will be documented and referred to the responsible York authority, which may require corrective action or pause admissions or delivery until the concern is resolved. The status of identified concerns and corrective actions will be documented in the subsequent annual report.

2.6 If applicable, describe changes to any admission requirements and the appropriateness of the revised requirements for the achievement of the Program Learning Outcomes.

No changes to admission requirements are proposed. Applicants to the MBAN at the Beijing location will be assessed against the applicable York University admission requirements and academic standards for the existing program. Maintaining common admissions requirements across locations ensures that all students enter the MBAN with the academic preparation necessary to achieve its established Program Learning Outcomes.

3. Teaching and Learning

3.1 If the proposed changes include a revision to mode(s) of delivery, comment on the appropriateness of the revised mode(s) of delivery for the achievement of the Program Learning Outcomes.
Note that when changing the mode of delivery for a program or a significant portion of a program from in person to online, the proposal should demonstrate the consideration of the program objectives[3] *and Program Learning Outcomes, as well as the adequacy of the technological platform and tools, sufficiency of the support services and training for teaching staff, sufficiency and type of support for students in the new learning environment, and access for students in the successful completion of their degree*.

The proposed modification adds an in-person delivery location for the existing MBAN program; it does not change the program's fundamental mode of delivery. The MBAN will continue to be delivered through structured, in-person graduate instruction using the same approved curriculum, course requirements, Program Learning Outcomes, assessment practices, and academic standards that apply at York University's Keele Campus.

The MBAN will be delivered through Renmin University's School of Information at its Zhongguancun Campus in Beijing. The location will provide the physical setting for faculty-led instruction, applied quantitative analysis, analytics and modelling exercises, case-based learning, collaborative work, presentations, and course-level assessment. As part of the York-led host-site review, Schulich will assess the classrooms, technology-enabled learning spaces, learning resources, accessibility arrangements, assessment conditions, and operational supports for the approved in-person delivery model. Before recruitment or admission begins, the appropriate York authority will confirm that any conditions identified through the review have been satisfied and that the site is operationally ready.

In-person delivery is appropriate for achievement of the existing MBAN Program Learning Outcomes because the program requires students to develop technical analytics expertise alongside professional capabilities strengthened through active participation, faculty

[3] See Quality Council's definition of "objectives" on their website.

interaction, collaborative learning, applied problem solving, and communication. The delivery model supports individual and team-based assignments, case analyses, presentations, modelling exercises, and other learning activities that require students to interpret evidence, exercise judgment, and communicate recommendations. In-person delivery will also support the existing experiential-learning component, through which students undertake a supervised business-analytics project and present their findings and recommendations.

In accordance with the VPA's direction and the Quality Council's expectations for delivery involving an international host institution, Schulich will complete a York-led review of the proposed site before recruitment or admission begins. The review will assess the suitability of the local institutional and regulatory context, facilities, instructional technology, learning resources, accessibility arrangements, assessment conditions, operational support, and student-access arrangements. It will document the methodology and evidence considered, findings, any conditions requiring resolution, and approval by the appropriate York authority. Academic quality assurance will remain under York University's direct control and will not be delegated to Renmin University.

York's verification of the local context will complement, rather than replace, York's continuing responsibility for the MBAN. York will retain responsibility for academic standards, admissions, curriculum, Program Learning Outcomes, instructional delivery, assessment, quality assurance, student experience, academic progression, academic records, and degree conferral. The same York-approved academic requirements, instructional expectations, assessment standards, and student-support expectations will apply across delivery locations.

3.2 If applicable, describe changes to program level assessment and the appropriateness of the revised forms of assessment as related to the Program Learning Outcomes.

No changes to program-level assessment are proposed. The addition of the Beijing delivery location does not alter the MBAN's existing assessment framework, course-level assessment methods, grading standards, academic-progression requirements, or graduation requirements.

Students at the Beijing delivery location will be assessed through the same approved course requirements and assessment methods that apply to the MBAN at York University's Keele Campus. Depending on the course, assessment may include examinations, individual and team assignments, case analyses, applied projects, presentations, quantitative, analytics, or modelling exercises, and other assessments aligned with the relevant course learning outcomes and Program Learning Outcomes.

The existing assessment framework remains appropriate because it evaluates both the technical and professional capabilities expected of graduates. Assessment continues to evaluate students' ability to apply quantitative and analytical methods, interpret evidence, develop business recommendations, communicate analytical findings, and work effectively in

applied and collaborative settings. The MBAN's experiential-learning component also provides an integrative assessment opportunity through a practice-based business-analytics project, written report, and presentation.

York University will retain responsibility for assessment standards, the integrity of assessment processes, grading, academic progression, and confirmation that students have satisfied all requirements for graduation and degree conferral. As a result, the addition of the Beijing delivery location will not affect the validity, consistency, or academic rigour of assessment in the MBAN program.

4. Resources

4.1 Describe any resource implications the proposed change may have and how they will be addressed. Attention should be paid to whether the proposed changes will be supported by a reallocation of existing resources or if new/additional resources will be required. If new/additional resources are required, provide a statement from the relevant Dean(s)/Principal confirming resources will be in place to implement the changes.

The proposed modification requires resources associated with operating the MBAN at an additional delivery location. These resource implications include local facilities, student support, instructional staffing for additional cohorts, and potential travel by faculty and staff. No new curriculum development or program infrastructure at York University is required because the MBAN, its courses, academic requirements, and governance structures already exist and remain unchanged.

The physical resources required for in-person delivery will be provided by Renmin University through its School of Information at the Zhongguancun Campus in Beijing. As part of the York-led host-site review, Schulich will assess the local classrooms, instructional technology, administrative facilities, learning resources, accessibility arrangements, assessment conditions, and student-access arrangements against the requirements of the approved MBAN delivery model. Before recruitment or admission begins, Schulich and the responsible York offices will confirm that any conditions identified through the review have been addressed and that the site is operationally ready.

A technology and learning-resources inventory will be completed and tested before approval to recruit the first cohort. The inventory will identify the analytics and AI software, cloud services, databases, library resources, learning-management systems, communication tools, computing capacity, classroom technology, data-storage arrangements, and examination-security measures required for each course. Testing will confirm that students and instructors can reliably access required York systems and curriculum-dependent tools from China and will identify local technical support, data-protection and cross-border transfer requirements, approved fallback arrangements if a platform or cloud service is unavailable, multi-factor

authentication requirements, and security-awareness expectations for York accounts. Faculty and staff travel protocols will address device and information security and provide a clear support and escalation path.

Where a technology, platform, database, cloud service, or other curriculum-dependent resource used in the Keele MBAN cannot reliably or lawfully be accessed at the Beijing location, Schulich will determine before delivery whether an approved alternative provides substantively equivalent functionality and supports achievement of the same course and Program Learning Outcomes. A course will not be delivered using a substitute technology that materially changes its approved learning objectives, academic standard, assessment requirements, or students' ability to achieve the applicable Program Learning Outcomes without approval through the applicable York academic processes.

The new delivery location will require an on-the-ground logistical support function. Renmin's designated program and administrative personnel may assist with local orientation, classroom information, facilities-related questions, communications, and referral to the appropriate York or Schulich office. York University and Schulich will retain responsibility for all formal academic and student-support functions, including academic advising, registration and academic records, accommodations, examination deferrals, academic-integrity matters, grade-related processes, academic progression, appeals, and graduation clearance.

Teaching the additional cohort will require staffing additional course sections. This need may be met through Schulich's existing roster of tenure-stream and adjunct or part-time faculty, subject to normal academic staffing and scheduling processes. If required to support the approved delivery model and projected enrolment, Schulich may also appoint additional tenure-track or adjunct faculty through the University's established academic hiring and appointment processes. York University will retain responsibility for instructional quality and academic oversight. Approximately 50% of the teaching load will be delivered by instructors nominated by Renmin University and approved by York University in accordance with York's applicable qualification, appointment, and quality-assurance requirements; the remaining teaching will be delivered by York-appointed instructors. Some travel by faculty and staff may be required to support instructional delivery, program implementation, site coordination, academic-quality monitoring, and the student experience.

Staffing and scheduling for the Beijing location will be planned to ensure that the delivery of the additional cohort does not reduce the availability of required courses, materially restrict approved curricular options, or compromise instructional quality for students enrolled at Keele. Faculty travel and teaching assignments associated with Beijing delivery will be incorporated into normal academic staffing and workload planning. Any incremental staffing, course coordination, assessment moderation, or replacement teaching requirements identified during implementation planning will be incorporated into the approved staffing and financial plans before the first cohort is admitted.

The associated financial requirements will be managed through the applicable University, Faculty, School, and program budget structures. Before final approval, Schulich will provide the appropriate governance bodies with a financial plan setting out projected cohort sizes, the minimum viable cohort, start-up and recurring costs, faculty and staff travel, instructional and local support costs, revenue distribution, currency and tax assumptions, downside scenarios, and funding for cancellation or teach-out. The plan will identify responsibility for financial losses if enrolment is below target and will assess any material effect on the Keele program. The Dean has confirmed that the proposed modification may proceed through academic governance, on the condition that implementation remains contingent upon approval of the final financial plan through the applicable University and Faculty processes. The first Beijing cohort will not be admitted unless the approved financial plan demonstrates that the projected cohort can be delivered without compromising the academic quality or financial sustainability of the existing MBAN.

The staffing plan will specify, by course or term, the anticipated source of instructors, the York academic lead, course-coordination and assessment-moderation responsibilities, workload recognition, travel expectations, and backup coverage. Renmin-nominated instructors will be reviewed against York-approved criteria concerning academic or professional qualifications, disciplinary expertise, teaching experience, and capacity to teach in the approved language of instruction. York will retain authority to approve or reject nominees. Approved instructors will complete required orientation and will be subject to course coordination, review of student feedback and assessment outcomes, annual performance monitoring, and replacement where York determines that academic or operational expectations are not being met.

5. Consultation

5.1 Summarize consultation undertaken with relevant academic units. Include in this summary a commentary on how the proposed changes could impact other programs. Provide individual statements from the relevant program(s) confirming consultation and support as appendices.

Consultation with relevant Schulich academic and administrative stakeholders confirmed support for the proposed delivery-location change and focused on maintaining the academic integrity and quality of the MBAN across locations. The consultation addressed curriculum and academic standards, instructor qualifications and oversight, assessment equivalence, experiential learning, technology and data access, staffing and resources, student services, market positioning, and operational implementation. Feedback informed the proposal's provisions concerning York's continuing academic authority, instructor approval and course leadership, assessment moderation, experiential-learning oversight, technology testing, student-service access, the host-site review, cross-location quality monitoring, and implementation safeguards. Because the modification adds a delivery location without

changing the curriculum, Program Learning Outcomes, academic requirements, or delivery of the existing Keele MBAN, no adverse impact on other Schulich programs is anticipated. Statements confirming consultation and support are included in the Consultation and Support Letters appendix.

5.2 Summarize the consultation of the proposed modifications undertaken with current students and/or recent graduates.

Consultation with recent MBAN graduates indicated support for the proposed Beijing delivery location and highlighted the importance of preserving the academic standards, student experience, and support services associated with the York degree. Feedback emphasized the value of providing qualified students in China with access to the established MBAN curriculum, while ensuring consistent instructional quality, assessment expectations, technology and learning resources, experiential-learning opportunities, and access to York and Schulich academic and administrative processes. These perspectives are reflected in the proposal's provisions for academic oversight, assessment equivalence, student-service delivery, technology testing, experiential-learning supervision, and cross-location quality monitoring. Statements confirming consultation and support are included in the Consultation and Support Letters appendix.

5.3 Summarize any other internal and/or external consultation that demonstrate alignment of proposed program modifications with best practices and current needs (e.g. consultation with the Office of Institutional Planning and Analysis (OIPA), Office of the Vice Provost Teaching and Learning, industry groups, accrediting bodies, etc.). Include as appendices statements/letters of support from the relevant units/groups confirming consultation and support.

External industry consultation included written assessments from six senior technology and industry advisers. All six supported adding the Beijing delivery location for the MBAN. Their assessments emphasized the need for graduates who can connect analytics, AI, data, and technology to strategy, operations, responsible innovation, and measurable business value; lead digital transformation and blended technical-business teams; and apply analytics and AI responsibly across sectors. The additional assessments reinforced the value of reciprocal learning between China and Canada, including exposure to China's rapid technology deployment, digital-payments and consumer-technology ecosystems, and entrepreneurial environment. They noted the potential for graduates to combine this speed and market experience with Canadian standards of validation and rigour, and to bring knowledge back to Canada through new products, companies, employment, cases, and wider academic and industry collaboration. One adviser also stressed that AI literacy, governance, ethics, security,

and risk are becoming essential capabilities for leaders across business functions. The assessments supported York's retention of control over admissions, curriculum, academic standards, quality assurance, student experience, and degree conferral, while also recommending explicit safeguards concerning technology access, AI and data governance, cybersecurity, research security, government relations, faculty and staff travel, student incident response, locally sensitive academic content, instructor standards, continuity planning, data protection, and intellectual property. These recommendations are reflected in the proposal's technology testing, data-protection, instructor-oversight, risk-management, academic-freedom, student-support, travel-security, experiential-learning, and continuity provisions. The six full assessments are included in the Consultation and Support Letters appendix.

Internal consultation: The Vice-Provost Academic authorized development of the major-modification proposal following review of the Notice of Intent. The response noted that the proposed additional delivery location aligns with York's commitment to expanding global connections and maintaining the currency and relevance of its academic programs. It also confirmed the expectation that the MBAN remain fully a York University program, with York retaining responsibility for academic standards, instructional delivery, admissions, curriculum, and degree conferral. In developing the proposal, Schulich was asked to provide sufficient detail on the academic and operational arrangements at the Renmin location, explain how York will maintain oversight of academic quality and the student experience, address the Quality Council's expectation regarding the host institution's quality-assurance environment, and provide evidence of student and labour-market demand for delivery in China. These matters are addressed throughout the proposal and will continue to guide implementation planning.

As part of implementation planning, Schulich will continue to engage the appropriate York offices on matters relevant to an international delivery location, including quality assurance, international partnerships, legal and regulatory considerations, privacy and cybersecurity, information technology, library resources, accessibility, risk management, student services, and financial planning. The scope and form of these consultations will follow the University's established processes, and any required confirmations will be obtained through the normal course of implementation.

Applicable Canadian and Chinese regulatory, institutional, and partnership requirements will be confirmed through the relevant York University and host-institution processes. Schulich will maintain an implementation record identifying the approval or agreement required, the responsible University or partner office, its status, and the stage of implementation to which it applies. Recruitment, admission, financial commitments to students, and delivery will proceed only when the approvals required for the relevant stage have been obtained. No student will be admitted to the Beijing delivery location at Renmin University's Zhongguancun Campus unless York University has confirmed that the approvals and institutional arrangements necessary to deliver the program to that cohort are in place.

The governing agreement will set out the respective academic and operational responsibilities of York University, Schulich, and the host institution. Consistent with University requirements, the agreement will address matters such as academic authority, instructional responsibilities, curriculum and assessment, recruitment and communications, student administration and protections, information management, use of institutional names, and arrangements for changes to or discontinuation of delivery.

Before students are admitted, Schulich will establish a student-continuity and teach-out framework for circumstances in which the partnership, regulatory environment, delivery site, technology environment, or operation of a cohort is materially disrupted. The framework will identify academic and administrative responsibilities for currently enrolled students; arrangements for completing outstanding program and experiential learning requirements; continued access to required technology and academic resources; access to academic records and student services; communications with affected students; and responsibility for costs associated with approved continuity or teach-out measures. These arrangements will be reflected, as appropriate, in the governing agreement and student-facing communications.

Program descriptions, recruitment materials, and admissions communications for the Beijing delivery location will be reviewed through the applicable York and Schulich processes. Communications will accurately describe the location and nature of the program and distinguish study in Beijing from physical study in Canada, including any implications for Canadian work authorization or immigration-related benefits. These matters will be addressed through normal implementation and partnership processes and do not alter the academic substance of the proposed delivery-location change.

Appendix: Consultation and Support Letters (5.1)

Tuesday, September 29, 2026 at 3:39:09 PM Eastern Daylight Time

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Subject: Re: Support for new delivery locations
Date: Tuesday, September 29, 2026 at 15:38:36 Eastern Daylight Time
From: Adam Diamant <adiamant@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Hi Luke,
I am supportive of the MFIN proposal.

Regards, Adam

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: Tuesday, September 29, 2026 2:17 PM
To: Adam Diamant <adiamant@schulich.yorku.ca>
Subject: Support for new delivery locations

Hi Adam,
I'm reaching out to seek your support for two proposals that will be considered separately: adding a new delivery location for the MBAN program at Renmin University's Beijing campus and a new delivery location for the MFin program at Renmin University's Shenzhen campus. The proposals are attached for your review. If you are supportive, could you please indicate your support for each proposal separately, as they will be advanced independently?
Thank you for your consideration.

Best,
Luke

Thursday, September 24, 2026 at 5:44:13 PM Eastern Daylight Time

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Subject: Support for proposed new delivery location of MBAN at Renming
Date: Thursday, September 24, 2026 at 16:08:57 Eastern Daylight Time
From: Chris Bell <cbell@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Hi Luke

I have reviewed and fully support the proposal for the new delivery location at Renmin University's Beijing campus for the MBAN program. This is an exceptionally detailed and well thought out strategy. I do believe and agree that this will be a valuable program for Schulich and York, raising our global profile. Having the option for students to attend the program in China is an important consideration, and is one that will no doubt help ensure the program's success. There are so many western universities partnering with schools in China that the proposal to deliver on site in China is essential to remaining competitive in that market.

Thank you for all the hard work and effort you and others have done to secure this program, and our foothold in a valuable market.

Best
Chris

Dr. Chris M. Bell, Professor, Organization Studies

N303E Schulich School of Business, York University
4700 Keele Street
Toronto, Ontario CANADA
M3J 1P3

Wednesday, September 30, 2026 at 2:08:32 PM Eastern Daylight Time

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Subject: RE: Support for new delivery locations
Date: Wednesday, September 30, 2026 at 13:24:04 Eastern Daylight Time
From: David Elsner <delsner@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Hi Luke. I support both proposals.

Regards,
David

David Elsner, MBA, BA, BASc
Program Director, Master of Business Analytics (MBAN)
Adjunct Professor, Operations Management & Information Systems
Schulich School of Business, York University
delsner@schulich.yorku.ca | 647-998-1587

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: September 29, 2026 11:55 AM
To: David Elsner <delsner@schulich.yorku.ca>
Subject: Support for new delivery locations

Hi David,
Hope the Fall semester is off to a great start! I'm reaching out to seek your support for two proposals that will be considered separately: adding a new delivery location for the MBAN program at Renmin University's Beijing campus and a new delivery location for the MFin program at Renmin University's Shenzhen campus. The proposals are attached for your review.
If you are supportive, could you please indicate your support for each proposal separately, as they will be advanced independently?
Thank you for your consideration.

Best,
Luke

Thursday, September 24, 2026 at 8:56:38 AM Eastern Daylight Time

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Subject: Re: support for new delivery location
Date: Thursday, September 24, 2026 at 07:34:46 Eastern Daylight Time
From: Kiridaran Kanagaretnam <kkanagaretnam@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Hi Luke,
No need. I support both proposals.
Regards,
Giri

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From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: Thursday, 24 September 2026 07:32:49
To: Kiridaran Kanagaretnam <kkanagaretnam@schulich.yorku.ca>
Subject: support for new delivery location

Hi Giri,
Kathryn just told me that the new delivery location proposal for mban and mfin should be separate. Can I send you the proposals for your support again? Thanks a lot!

Luke

Thursday, September 24, 2026 at 9:31:30 AM Eastern Daylight Time

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Subject: RE: Support for new delivery locations
Date: Thursday, September 24, 2026 at 09:13:11 Eastern Daylight Time
From: Maxim Voronov <mvoronov@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>
Attachments: image001.jpg

Hi Luke,

Re: Beijing campus proposal – it is excellent. I support it fully.

Re: Shenzhen campus proposal – it is excellent. I support it fully.

Best,
Maxim

Maxim Voronov, Ph.D. (he/him)
Professor of Sustainability and Organization

Senior Editor, *Organization Studies*

Schulich School of Business, York University
Room G 327 | 4700 Keele Street
Toronto, Ontario
Canada M3J 1P3
Email: mvoronov@schulich.yorku.ca | http://maximvoronov.net

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: September 24, 2026 7:27 AM
To: Maxim Voronov <mvoronov@schulich.yorku.ca>
Subject: FW: Support for new delivery locations

Hi Maxim,
Hope the Fall semester is off to a great start! I'm reaching out to seek your support for two proposals that will be considered separately: adding a new delivery location for the MBAN program at Renmin University's Beijing campus and a new delivery location for the MFin program at Renmin University's Shenzhen campus. The proposals are attached for your review.
If you are supportive, could you please indicate your support for each proposal separately, as they will be advanced independently?
Thank you for your consideration.

Best,
Luke

Thursday, September 24, 2026 at 9:28:41 AM Eastern Daylight Time

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Subject: RE: Support for new delivery locations
Date: Thursday, September 24, 2026 at 09:20:16 Eastern Daylight Time
From: Melanie Cao <mcao@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>
Attachments: 2026 Sept MFIN new delivery location proposal.docx, 2026 Sept MBAN new delivery location proposal.docx

Luke,

You have my full support. I have signed the two documents.

Melanie Cao
Professor of Finance
Director of Master of Finance
Schulich School of Business
York University

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: September 24, 2026 8:56 AM
To: Melanie Cao <mcao@schulich.yorku.ca>
Subject: Support for new delivery locations

Hi Melanie,
Hope the Fall semester is off to a great start! I'm reaching out to seek your support for two proposals that will be considered separately: adding a new delivery location for the MBAN program at Renmin University's Beijing campus and a new delivery location for the MFin program at Renmin University's Shenzhen campus. The proposals are attached for your review.
If you are supportive, could you please indicate your support for each proposal separately, as they will be advanced independently?
Thank you for your consideration. Sincerely,

Best,
Luke

Monday, September 28, 2026 at 1:56:01 PM Eastern Daylight Time

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Subject: RE: Support for new delivery locations
Date: Monday, September 28, 2026 at 10:41:54 Eastern Daylight Time
From: Ming Dong <mdong@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Hi Luke,

You have my support for the new delivery location for the MBAN program at Renmin University, Beijing.

I already gave support to Melanie for the new delivery location for the MFIN program in Shenzhen.

Best regards,
Ming

Ming Dong
Professor of Finance / Area Coordinator, Finance
Schulich School of Business
York University
Toronto, Canada

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: September 25, 2026 6:24 AM
To: Ming Dong <mdong@schulich.yorku.ca>
Subject: Support for new delivery locations

Hi Ming,
Hope the Fall semester is off to a great start! I'm reaching out to seek your support for two proposals that will be considered separately: adding a new delivery location for the MBAN program at Renmin University's Beijing campus and a new delivery location for the MFin program at Renmin University's Shenzhen campus. The proposals are attached for your review.
If you are supportive, could you please indicate your support for each proposal separately, as they will be advanced independently?
Thank you for your consideration.

Best,
Luke

Tuesday, September 29, 2026 at 9:03:16 AM Eastern Daylight Time

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Subject: Re: Support for new delivery locations
Date: Tuesday, September 29, 2026 at 09:02:35 Eastern Daylight Time
From: Mehmet Murat Kristal <mkristal@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Hi Luke:

Likewise. I support both of the proposals. Good luck!!!

Best,

Murat

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Date: Tuesday, September 29, 2026 at 8:50 AM
To: Mehmet Murat Kristal <mkristal@schulich.yorku.ca>
Subject: Support for new delivery locations

Hi Murat,
It was great connecting with you yesterday! I'm reaching out to seek your support for two proposals that will be considered separately: adding a new delivery location for the MBAN program at Renmin University's Beijing campus and a new delivery location for the MFin program at Renmin University's Shenzhen campus. The proposals are attached for your review.
If you are supportive, could you please indicate your support for each proposal separately, as they will be advanced independently?
To clarify, these two proposals are for offering MBAN and MFin with Renmin University in Beijing and Shenzhen. I am still putting together the proposals for MMAI and TechMBA.
Thank you for your consideration.

Best,
Luke

Thursday, September 24, 2026 at 8:56:19 AM Eastern Daylight Time

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Subject: Re: Support for new delivery location for mban and mfin
Date: Thursday, September 24, 2026 at 07:50:53 Eastern Daylight Time
From: Ruodan Shao <rshao@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Yes, of course! Happy to support both proposals!

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From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: Thursday, 24 September 2026 07:33:13
To: Ruodan Shao <rshao@schulich.yorku.ca>
Subject: Support for new delivery location for mban and mfin

Hi Ruodan,
Kathryn just told me that the new delivery location proposal for mban and mfin should be separate. Can I send you the proposals for your support again? Thanks a lot!

Luke

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Luke Zhu, Associate Dean Program
Date: October 21, 2026
Re: Major Modification to Add a New Delivery Location for the Master of Finance Program

Motion: That Faculty Council approve the major modification to add Renmin University of China's Zhongguancun Campus in Beijing, China, as an additional delivery location for the Master of Finance (MFin) program.

Rationale: The proposed Beijing location will extend access to Schulich's established MFin program in China's capital and national financial management centre, which is also a leading centre of technology and innovation. The program's focus on advanced finance, quantitative methods, financial analysis, valuation, risk management, financial modelling, and professional decision-making is well aligned with Beijing's financial-services, regulatory, and technology-enabled business environment. The proposal supports York's commitment to expanding global connections and Schulich's objective of providing globally relevant, industry-connected management education. The MFin will remain a York University program, with York retaining authority over admissions, curriculum, instructor approval, assessment, academic standards, quality assurance, student support, academic records, and degree conferral. Faculty Council approval is an initial step that will allow Schulich and Renmin to prepare and submit the program for assessment and approval by China's Ministry of Education; the proposal is grounded in a detailed assessment of academic, operational, and financial feasibility. The approval and implementation process will take time, during which the detailed arrangements will continue to be refined; should material circumstances change, Schulich will retain the ability to reconsider proceeding.

York University

Major Modifications to Existing Programs

TEMPLATE

Major Modifications to Existing Programs fall under Section 5 of the York University Quality Assurance Procedures (YUQAP).

Full YUQAP can be found here: https://www.yorku.ca/unit/yuqap/

MAJOR MODIFICATIONS TYPICALLY INCLUDE ONE OR MORE OF THE FOLLOWING FEATURES:

- Substantive changes to learning outcomes and/or approved requirements that comprise up to approximately one-third of the program
- Major changes to courses comprising a significant proportion of the program and making an important contribution to meeting program learning outcomes (approximately one-third of courses)
- The addition of a new major (undergraduate) where a similar major exists
- Change in program name and/or degree nomenclature when this results in a change in learning outcomes. (Note: New degree types require a separate Motion to Senate)
- Addition or deletion of streams
- Establishment of undergraduate certificates
- The merger of two or more programs
- The creation of combined degrees (existing programs), either undergraduate, graduate, or undergraduate/graduate
- Establishment of a dual credential arrangement (degree/degree or degree/diploma).
- Establishment of a minor program or option.
- The addition of new options or significant changes to a program's delivery, including to the program's faculty and/or to the essential physical resources as may occur, for example, where there have been changes to the existing mode(s) of delivery (e.g., different campus, part-time to full-time (or vice-versa) and/or online/hybrid delivery)
- At the master's level, the introduction or deletion of a major research paper or thesis, or a course-only, co-op, placement, internship, or practicum option
- In a graduate program, addition or deletion of an allowable dissertation / thesis format.
- The introduction or deletion of a required co-op, course-based placement, practicum, internship, or other work-integrated learning option
- A new specialization at the graduate level
- The introduction or deletion of a field in a graduate program
- The creation of a collaborative specialization at the graduate level
- The creation of a new Type 1 graduate diploma

- Significant change to graduate degree requirements, including comprehensive exams and thesis requirements, that result in a significant change to the learning outcomes (see first point above).

Major Modifications Proposal

Faculty: Schulich School of Business

Department: N/A

Program: Master of Finance

Degree Designation: Master of Finance

Type of Modification:

Add a delivery location for the Master of Finance (MFin)

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

Proposed: Renmin University of China's Zhongguancun Campus, Beijing, China

It is currently offered at the Keele Campus of York University

Effective Date: September 2027

Approval Date at Faculty Council:

1. Overview

1.1 Provide a brief summary of the proposed changes to the program.

This proposal seeks approval for a major modification to add an international delivery location for Schulich's existing Master of Finance (MFin) program. The modification would enable York University to deliver the MFin at Renmin University of China's Zhongguancun Campus in Beijing, China, while the program continues to be offered at York University's Keele Campus.

Under the proposed modification, the MFin remains a York University program. York University will retain responsibility for academic standards, admissions, curriculum, Program Learning Outcomes, assessment, academic progression, academic records, quality assurance, student experience, and degree conferral. Approximately 50% of the teaching load will be delivered by instructors nominated by Renmin University and approved by York University in accordance with York's applicable qualification, appointment, and quality-assurance requirements; the remaining teaching will be delivered by York-appointed instructors.

The intended start date for delivery at the new location is September 2027, subject to completion of York's internal governance approvals and any required external regulatory approvals. The addition of the Beijing delivery location is classified as a major modification because it represents a significant change to the program's delivery, including the physical resources and campus context in which the MFin is delivered.

1.2 Provide the rationale for the proposed changes.

The proposed addition of a delivery location at Renmin University of China's Zhongguancun Campus in Beijing will extend the geographic reach of Schulich's established Master of Finance program to Beijing, China's capital and a major centre of finance, technology, innovation, and higher education. The modification will enable qualified students to complete the existing York University MFin in China while meeting the same program requirements, academic standards, and graduation requirements that apply at York's Keele Campus.

Renmin University of China is a nationally prominent research university directly administered by China's Ministry of Education. It was selected for both Project 211 and Project 985, two major national initiatives established to strengthen leading Chinese universities: Project 211 supported approximately 100 institutions in developing advanced teaching and research capacity for the twenty-first century, while Project 985 identified a smaller group of top-tier universities for intensive investment aimed at achieving world-class standing. Renmin is also included in the successor national Double First-Class initiative, which supports the development of world-class universities and academic disciplines. Together, these designations reflect Renmin's longstanding position within the leading tier of China's higher-education system.

There is a strong labour-market rationale for extending the MFin to Beijing. As China's national financial management centre, the city is home to the country's principal financial regulators, many of its largest financial institutions, and the Beijing Stock Exchange. Its financial ecosystem includes banking, securities, asset management, insurance, financial technology, corporate finance, and related professional services. These sectors require graduates with advanced knowledge of finance, quantitative methods, financial analysis, valuation, risk management, and evidence-informed decision-making.

Beijing is an appropriate delivery location because it combines a highly concentrated financial-services sector with a strong technology and innovation ecosystem. Beijing's Financial Street, located in Xicheng District, is the centre of the city's financial sector: according to the Financial Street Development Report (2026), the district's financial sector generated value added of 298.36 billion yuan in 2025, accounting for 34.4 percent of Beijing's total financial-sector value added. The Financial Industry Development Plan of Beijing Municipality for the 15th Five-Year Plan Period (2026–2030) aims to markedly enhance Beijing's overall strength as the national financial management centre by 2035 and includes deepening reforms at the Beijing Stock Exchange. In addition, the Global FinTech Hub Report released at the 2026 Financial

Street Forum identified Beijing as one of China's comprehensive global fintech hubs, noting the city's role in linking scientific research, financial institutions, and regulatory technology applications.

The MFin's existing focus on advanced finance, financial analysis, quantitative methods, financial modelling, and professional decision-making is well aligned with the capabilities required in Beijing's financial and technology-enabled business environment. The program is designed to prepare graduates to analyze financial information, evaluate investment and corporate-finance decisions, assess risk, develop financial models and recommendations, and communicate complex financial analyses to professional audiences.

External industry consultation supports the value of adding a China-based delivery location. The industry experts consulted identified China as a compelling setting in which to broaden access to internationally oriented graduate finance education. They also identified China's substantial student population, continued interest in finance education, and developing financial markets as creating a meaningful opportunity for a locally delivered Schulich MFin. Their assessments support the strategic fit of a China-based location for the existing program.

Evidence of market demand comes from Schulich's recruitment experience, consultation with recent MFin graduates, and the presence of comparable international graduate business programs in China. The Recruitment and Communication Coordinator responsible for the MFin reports that applications and enrolments from Chinese students have declined since the 2025 intake, while enquiries and recruitment conversations continue to show interest in internationally recognized qualifications. Prospective students increasingly identify the cost of studying abroad, family commitments, visa and mobility uncertainty, and a desire to remain connected to the Chinese employment market as reasons for preferring a locally delivered international degree.

Consultation with recent MFin graduates provides consistent supporting evidence. Graduates with experience in both China and Canada identified a distinct group of students who value Schulich's curriculum, academic standards, and international perspective but intend to build their careers in China and may be unable or unwilling to relocate to Canada. They distinguished this group from students who choose the Keele program partly for the experience of living in Canada, developing Canadian professional networks, and pursuing Canadian employment opportunities. This distinction suggests that a China-based offering could broaden access to a different segment of qualified students rather than simply redirecting existing Keele applicants.

The viability of this delivery model is also supported by comparable offerings in the Chinese market, including the UBC International MBA in Shanghai and the University of Alberta–Tongji University Master of Management Analytics program in Shanghai. These programs demonstrate an established market for internationally developed graduate business education delivered in China. Together with Schulich's recruitment observations and graduate

consultations, this evidence supports a reasonable expectation of demand for a Beijing-based MFin, subject to cohort targets and continued monitoring of applications, offers, conversions, enrolment, pricing, student origin, and potential effects on Keele enrolment.

The MFin already attracts students at York's Keele Campus, demonstrating established demand for its professionally oriented curriculum and learning outcomes. Actual enrolment at the Beijing location will remain subject to York University's admission standards, applicable regulatory approvals, and the viability of each proposed cohort.

Before a Beijing cohort is admitted, Schulich will assess demand against the enrolment and financial assumptions established in the approved business case. This assessment will consider applications, offers, acceptance and conversion patterns, expected cohort size, student origin, recruitment-channel performance, pricing, and potential effects on enrolment at the Keele location. Schulich will not proceed with a cohort that does not satisfy the academic, operational, and financial conditions established for viable delivery.

1.3 Comment on the alignment of the program changes with Faculty and/or University academic plans.[1]

The proposed addition of a delivery location for the MFin in Beijing aligns with York University's 2026–2030 University Academic Plan, Sustainability, Collaboration, Community. In particular, the proposal supports the Plan's principle of Expanding Global Connections, which commits York to broadening and deepening its global relationships, awareness, and interdependence with communities and institutions around the world. Delivering an established York graduate program at a carefully selected international location advances this objective by extending York's academic presence and building sustained relationships with students, institutions, and professional communities in China.

The modification also aligns with the Plan's commitments to forward-looking teaching and learning and to pathways for student success. The MFin is a professionally oriented graduate program designed to develop advanced financial, quantitative, analytical, and decision-making capabilities. Adding a delivery location in Beijing will make this established York program accessible to qualified students in China's national financial management centre and a major technology-oriented ecosystem, while maintaining the program's existing academic standards, admissions requirements, curriculum, and degree expectations.

The proposal is also consistent with York's Global Engagement and Internationalization Strategy, which emphasizes inclusive global and intercultural learning, stronger international partnerships, and strategic relationships that enhance York's global profile and impact. The

[1] This can include the 2020-2025 University Academic Plan, the 2023-2028 Strategic Research Plan, the UN Sustainable Development Goals (SDGs), A Framework and Action Plan on Black Inclusion, the Indigenous Framework for York University, and other Faculty plans and frameworks.

delivery-location model advances these priorities through a structured institutional relationship that supports local program operations while York retains responsibility for academic standards, admissions, curriculum, quality assurance, student experience, and degree conferral.

At the Faculty level, the modification supports Schulich's objective of offering globally relevant, industry-connected management education. The MFin extends Schulich's strengths in finance, quantitative analysis, technology-enabled decision-making, and professional graduate education. The proposed Beijing location provides an opportunity to bring this established program to students and professional communities in China without duplicating programs at York or altering the academic requirements of the degree.

1.4 Provide a detailed outline of the changes to the program.

The proposed modification is limited to the addition of an international delivery location for Schulich's existing Master of Finance program. The MFin will be delivered at Renmin University of China's Zhongguancun Campus in Beijing, China, while continuing to be offered at York University's Keele Campus.

The modification does not create a new program, degree, field, stream, specialization, or credential. It does not change the existing curriculum, course requirements, credit requirements, Program Learning Outcomes, admission requirements, assessment framework, degree requirements, or academic standards of the MFin.

Students admitted at the Beijing delivery location will be admitted to York University's MFin and will complete the same approved program requirements as students in the corresponding Keele-based program. York University will retain responsibility for academic standards, admissions, curriculum, Program Learning Outcomes, instructional delivery, assessment, quality assurance, student experience, academic progression, academic records, and degree conferral. The program will continue to be delivered through structured, in-person graduate instruction using York-approved course content, learning activities, course outlines, and assessment requirements.

York University will retain responsibility for instructional quality and academic oversight. In accordance with the approved staffing plan, approximately 50% of the teaching load will be delivered by instructors nominated by Renmin University and approved by York University in accordance with York's applicable qualification, appointment, and quality-assurance requirements. The remaining teaching will be delivered by York-appointed instructors. All instructors will teach York-approved courses and will be subject to the same approved course outlines, learning materials, assessment requirements, grading standards, academic-integrity expectations, and quality-assurance processes. Renmin University will provide the physical delivery site and local logistical support necessary for delivery in Beijing.

Before recruitment or admission begins, Schulich will complete a York-led host-site review of the proposed delivery location. The review will assess the local institutional and regulatory context; classrooms and instructional technology; administrative facilities; finance-specific learning resources; accessibility arrangements; examination and assessment conditions; student-service access; and operational readiness. The review will document the methodology and evidence considered, findings, any conditions requiring resolution, and approval by the appropriate York authority.

Schulich will establish written operating protocols before the first cohort is admitted. These protocols will identify the responsible York or Schulich office, the role of on-site personnel, communication procedures, and escalation pathways for course scheduling; classroom operations; academic and administrative communications; enrolment-related enquiries; academic advising; accommodations; examination deferrals; academic-integrity matters; grade-related questions; appeals; access to student-support services; and operational incidents affecting the student experience.

Designated Renmin personnel may provide local logistical assistance and communications support. They will not make determinations regarding admissions, registration, academic accommodations, assessment, grades, academic integrity, academic progression, appeals, or degree requirements. These determinations will be made through the applicable York University and Schulich processes.

York University will maintain direct academic-quality oversight through its established academic governance and program-quality processes. The same York-approved curriculum, course requirements, Program Learning Outcomes, teaching expectations, assessment standards, grading practices, academic-integrity requirements, academic-progression requirements, and graduation requirements will apply to all students.

York and Schulich will approve instructor assignments before delivery under a documented instructor appointment and oversight protocol. The protocol will specify required qualifications, English-language instructional capacity, appointment authority and category, review of credentials and teaching evidence, orientation, course coordination, teaching evaluation, renewal, replacement, and escalation. Each course will have a designated York academic lead. Schulich may reject or replace a nominated instructor, and any material change to an instructor assignment, course content, learning activity, assessment, teaching material, or delivery arrangement will require prior approval through the applicable York and Schulich processes.

Concerns relating to instructional quality, assessment, student support, academic integrity, local operating conditions, or the student experience will be documented, referred to the responsible York or Schulich office, and addressed through the applicable York academic and administrative processes.

Students at the Beijing location will receive substantively equivalent access to York academic processes, student services, and student protections through documented arrangements appropriate to the international location. York University and Schulich will retain responsibility for academic advising, registration and academic records, academic accommodations, examination deferrals, academic-integrity matters, grade-related processes, academic progression, appeals, and graduation clearance. The operating protocol will identify the accountable York office, local point of contact, route of access, expected response standard, confidential-document process, and escalation route for each service.

Renmin's designated on-site personnel may provide local logistical assistance, orientation support, classroom information, and referral to the appropriate York or Schulich office. On-site personnel will not make academic or administrative determinations on York's behalf. The written operating protocols will specify how students submit requests, how matters are escalated, and how York and Schulich communicate decisions and follow-up actions to students.

Renmin University will make a material instructional and operational contribution by providing the physical delivery site, local logistical support, and nominated instructional personnel in accordance with a York-approved staffing plan. York University will retain exclusive academic decision-making authority over admissions, curriculum, Program Learning Outcomes, instructor approval, course outlines, assessment standards, grading, academic standing, academic integrity, academic records, student appeals, quality assurance, and degree conferral. Schulich may reject or require replacement of a nominated instructor or suspend a delivery arrangement that does not meet York's approved requirements.

York recognizes the Quality Council's expectation that universities consider the quality-assurance environment applicable to an international delivery location. Because academic quality assurance for the York program will not be delegated to Renmin University, York's due diligence will assess the suitability of the local institutional and regulatory context to host the delivery arrangement; the adequacy of the physical site, learning resources, instructional technology, and local operating conditions; and the qualifications and York-approval process for instructional personnel.

Schulich will complete the York-led host-site review and identify any conditions requiring resolution before recruitment or admission begins. The review will assess the local institutional and regulatory context; facilities; finance-specific databases, software, and licensing; instructional technology; accessibility; examination security; student-service access; and operational readiness. Schulich will finalize written operating protocols that identify accountable offices, service standards, escalation routes, and approval points for academic delivery, assessment, academic integrity, student support, and quality assurance.

The local host-site review will complement, rather than replace, York's ongoing academic oversight. The program will remain governed by York University's academic policies, academic

governance processes, and quality-assurance procedures. Students will therefore be taught, assessed, supported, and evaluated through York-governed processes and against the same academic requirements that apply at Keele.

The additional delivery location is intended to begin in September 2027, subject to completion of York University's internal governance approvals and any required external regulatory approvals. Because the modification pertains exclusively to delivery location, it does not require substantive amendments to the existing Graduate Academic Calendar requirements for the MFin. No changes to the existing MFin program requirements in the Graduate Academic Calendar are proposed.

Implementation conditions. Approval of this major modification authorizes the addition of Beijing as a delivery location but does not, by itself, authorize recruitment, admission, or program delivery. Before recruitment and admission to the Beijing location begin, Schulich will confirm that all required University and external regulatory approvals have been obtained; the governing agreement with the host institution has been executed through the applicable University processes; any conditions arising from the host-site review have been resolved; the instructor appointment and oversight, academic-equivalence and assessment, student-service and escalation, and student-continuity protocols have been finalized; required instructional technologies, finance-specific learning resources, and student-support arrangements have been verified; and the final business case has received the required University and Faculty approvals. Program delivery will not commence unless these conditions have been satisfied.

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

The proposed modification will not affect students currently enrolled in the MFin at York University's Keele Campus. Those students will continue to complete the program requirements, courses, assessments, academic progression requirements, and graduation requirements in effect at the time of their admission, consistent with York University policies and the Graduate Academic Calendar.

The proposed change adds a delivery location only; it does not alter the existing curriculum, Program Learning Outcomes, credit requirements, admission requirements, assessment framework, degree requirements, or academic standards of the MFin. Accordingly, no transition arrangements, substitutions, or changes to students' plans of study are required for currently enrolled students.

Students admitted to future cohorts at the Beijing delivery location will be admitted directly to York University's MFin and will complete the same approved program requirements and meet the same academic standards as students in the corresponding Keele-based program. The addition of the Beijing location will therefore not displace, restrict, or otherwise adversely affect access to courses, academic supports, or progression for students currently enrolled at Keele.

2. Learning Outcomes and Program Requirements

2.1 List the current and/or updated Program Learning Outcomes for the proposed modified program.[2]

The proposed modification concerns the addition of a delivery location only. It does not change the existing Program Learning Outcomes of the Master of Finance. Students admitted at the proposed Beijing location will be expected to achieve the same Program Learning Outcomes as students enrolled in the MFin at York University's Keele Campus. York University will retain responsibility for the program's curriculum, Program Learning Outcomes, instructional delivery, assessment, academic standards, and degree conferral.

The current Program Learning Outcomes for the MFin are therefore reproduced below without amendment. The Program Learning Outcomes will continue to be achieved and assessed through the existing approved program structure, courses, learning activities, and assessment practices.

Graduates of the MFin will be able to:

- Apply advanced financial theories, concepts, and analytical frameworks to evaluate financial decisions and complex financial problems.
- Analyze financial data and market information using appropriate quantitative, statistical, and financial-modelling techniques.
- Evaluate investment, corporate-finance, risk-management, and financial-market decisions using evidence-based analysis and professional judgment.
- Develop, assess, and communicate financial models, valuations, forecasts, and recommendations appropriate to organizational and market contexts.
- Critically assess the assumptions, limitations, uncertainties, ethical implications, and risks associated with financial data, models, and decisions.
- Integrate financial knowledge with economic, regulatory, technological, and organizational considerations in evaluating financial issues.
- Communicate complex financial analyses, judgments, and recommendations clearly and persuasively to specialist and non-specialist audiences.
- Work effectively and responsibly in professional and collaborative settings characterized by diverse perspectives, interests, and expertise.

[2] 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.

- Demonstrate ethical conduct, professional responsibility, and sound judgment in financial analysis, decision-making, and communication.
- Demonstrate the capacity for independent learning and ongoing professional development in response to changes in financial markets, methods, regulation, and practice.

2.2 If applicable, describe and/or map how your Program Learning Outcomes map onto Ontario's Degree Level Expectations.

Not applicable. The proposed modification adds a delivery location only and does not revise the existing Program Learning Outcomes for the MFin. Accordingly, the program's existing alignment with the Ontario Degree Level Expectations remains unchanged, and no revised PLO-to-DLE mapping is required.

2.3 If applicable, describe and/or map how courses map onto to the Program Learning Outcomes.

Not applicable. The proposed modification does not change the approved curriculum, course requirements, or Program Learning Outcomes. Existing course-to-PLO curriculum maps therefore remain unchanged, and no revised curriculum mapping is required.

2.4 If applicable, describe how the proposed modifications will support the achievement of Program Learning Outcomes.

The proposed modification will support continued achievement of the existing MFin Program Learning Outcomes by enabling delivery of the established York University program in an appropriate, in-person academic setting in Beijing. The modification does not change the program's curriculum, course requirements, credit requirements, Program Learning Outcomes, assessment framework, admission requirements, or academic standards. Students at the additional delivery location will therefore be expected to achieve the same Program Learning Outcomes as students enrolled in the MFin at York's Keele Campus.

The Beijing delivery location will support the approved learning activities through which students develop and demonstrate the program's existing outcomes. These activities include faculty-led instruction, applied financial analysis, quantitative and financial-modelling exercises, case-based learning, individual and team assignments, presentations, collaborative problem solving, and course-level assessment. These activities enable students to apply financial theories and analytical frameworks, evaluate financial decisions, exercise professional judgment, and communicate financial analyses and recommendations effectively.

The external industry consultation also supports the appropriateness of delivering the existing MFin in China without changing its approved learning outcomes. Both experts viewed a China-based location as a way to make Schulich's established finance education accessible to

students who wish to remain connected to China's financial sector, technology ecosystem, employers, and professional networks. Their letters therefore support the delivery-location change itself rather than any change to the program's name, curriculum, or academic requirements.

York University will retain responsibility for the academic conditions necessary for achievement of the Program Learning Outcomes. The same York-approved curriculum, course outlines, instructional expectations, learning materials, assessment requirements, grading standards, academic-integrity requirements, and graduation requirements will apply at the Beijing location as at Keele. Instructors delivering the program, including instructors nominated by Renmin University, will be approved through York's applicable staffing and quality-assurance processes. York and Schulich will ensure that instructors receive the relevant course outlines, learning-outcome expectations, teaching materials, assessment requirements, grading standards, and academic-integrity procedures before delivery. York's oversight will include review of course delivery, student progress, assessment outcomes, and student feedback, with concerns addressed through established York academic and administrative processes.

York University will retain responsibility for instructional quality and academic oversight. Approximately 50% of the teaching load will be delivered by instructors nominated by Renmin University and approved by York University in accordance with York's applicable qualification, appointment, and quality-assurance requirements; the remaining teaching will be delivered by York-appointed instructors. Before recruitment or admission begins, the host-site review will confirm that the instructional facilities, technology, learning resources, and student-access arrangements at the Beijing site are suitable for the approved delivery model.

Schulich will monitor course delivery, student progress, academic performance, assessment outcomes, and student feedback as part of ongoing program oversight. Where concerns arise regarding instructional quality, assessment, student support, or local delivery conditions, York will address them through the appropriate academic and administrative processes.

The addition of the Beijing delivery location will therefore extend access to the existing MFin program without altering the learning outcomes students must achieve or the academic standards through which those outcomes are attained and assessed.

2.5 If applicable, describe how the achievement of the Program Learning Outcomes will be assessed and how that assessment of the Program Learning Outcomes will be documented.

The proposed modification will not change how the MFin assesses or documents achievement of its Program Learning Outcomes. Students at the Beijing delivery location will complete the same York-approved courses, learning activities, and assessment requirements as students in

the MFin at York's Keele Campus. Assessment methods will continue to be set out in approved course outlines and may include examinations, individual and team assignments, case analyses, applied projects, presentations, quantitative exercises, financial-modelling exercises, and other forms of assessment aligned with relevant course learning outcomes and Program Learning Outcomes.

York University will retain responsibility for the integrity, consistency, and academic standards of assessment at all delivery locations. The same York-approved assessment requirements, grading standards, academic-integrity requirements, procedures for academic accommodation where applicable, and academic-progression requirements will apply to students in Beijing and at Keele. Faculty teaching the courses will assess student work in accordance with York's approved course requirements and grading practices. Academic concerns, including questions related to grading, academic integrity, progression, or student appeals, will be addressed through the applicable York academic policies and procedures. York will retain the authority to determine and administer outcomes in academic matters. On-site personnel may facilitate communication or provide logistical assistance, but they will not make determinations regarding assessment, grades, academic integrity, progression, appeals, or graduation eligibility. This distinction will be reflected in the operating protocols established before the first cohort is admitted.

Achievement of the MFin Program Learning Outcomes will continue to be documented through York University's established academic processes. These include course-level assessment records, final grades, academic-progress records, completion of program requirements, official transcripts, and graduation-clearance processes. York will retain responsibility for maintaining official academic records, determining whether students have met the academic requirements for progression and graduation, and confirming eligibility for degree conferral.

Program-level monitoring will include an annual cross-location quality report prepared under the authority of the MFin Program Director and reviewed through Schulich's established academic quality-assurance processes. The report will compare admissions profiles, course delivery, instructor qualifications, grade patterns, progression and attrition, academic-integrity cases, student feedback, service issues, evidence of Program Learning Outcome achievement, and corrective actions across Beijing and Keele. Significant differences between locations will be examined to determine whether they reflect legitimate cohort or delivery differences or require academic or operational remediation. Material concerns will be documented and referred to the responsible York authority, which may require corrective action and may pause admissions or delivery until the concern is resolved. The status of identified concerns and corrective actions will be documented in the subsequent annual report.

2.6 If applicable, describe changes to any admission requirements and the appropriateness of the revised requirements for the achievement of the Program Learning Outcomes.

No changes to admission requirements are proposed. Applicants to the MFin at the Beijing location will be assessed against the applicable York University admission requirements and academic standards for the existing program. Maintaining common admissions requirements across locations ensures that all students enter the MFin with the academic preparation necessary to achieve its established Program Learning Outcomes.

3. Teaching and Learning

3.1 If the proposed changes include a revision to mode(s) of delivery, comment on the appropriateness of the revised mode(s) of delivery for the achievement of the Program Learning Outcomes.

The proposed modification adds an in-person delivery location for the existing MFin program; it does not change the program's fundamental mode of delivery. The MFin will continue to be delivered through structured, in-person graduate instruction using the same approved curriculum, course requirements, Program Learning Outcomes, assessment practices, and academic standards that apply at York University's Keele Campus.

The MFin will be delivered at Renmin University of China's Zhongguancun Campus in Beijing. Before recruitment or admission begins, the host-site review will assess whether the proposed location provides an appropriate physical setting for faculty-led instruction, applied financial analysis, quantitative and financial-modelling exercises, case-based learning, collaborative work, presentations, and course-level assessment. It will also assess the suitability of the instructional facilities, technology-enabled classrooms, learning-space access, and operational supports for the approved in-person delivery model.

In-person delivery is appropriate for achievement of the existing MFin Program Learning Outcomes because the program requires students to develop technical finance expertise alongside professional capabilities strengthened through active participation, faculty interaction, collaborative learning, applied problem solving, and communication. The delivery model supports individual and team-based assignments, case analyses, presentations, modelling exercises, and other learning activities that require students to interpret financial evidence, exercise professional judgment, and communicate recommendations.

In accordance with the Vice-Provost Academic's direction and the Quality Council's expectations for delivery involving an international host institution, Schulich will complete a York-led host-site review of the proposed site before recruitment or admission begins. The review will assess the suitability of the local institutional and regulatory context, facilities,

instructional technology, finance-specific learning resources, accessibility arrangements, assessment conditions, operational support, and student-access arrangements. Any conditions identified through the review must be resolved and approved by the appropriate York authority before recruitment or admission begins.

Academic quality assurance will remain under York University's direct control and will not be delegated to Renmin University. The review will also assess the processes through which instructors will be approved and oriented; York course requirements and assessment standards will be implemented; academic and student-support matters will be referred and resolved; and instructional-quality, student-experience, or operational concerns will be documented, escalated, and addressed. Any conditions identified through the review will be resolved before delivery begins.

York's planned verification of the local context will complement, rather than replace, York's continuing responsibility for the MFin. York will retain responsibility for academic standards, admissions, curriculum, Program Learning Outcomes, instructional quality, assessment, quality assurance, student experience, academic progression, academic records, and degree conferral. Approximately 50% of the teaching load will be delivered by instructors nominated by Renmin University and approved by York under York's applicable qualification, appointment, and quality-assurance requirements. The same York-approved academic requirements, instructional expectations, assessment standards, and student-support expectations will apply at both delivery locations.

3.2 If applicable, describe changes to program level assessment and the appropriateness of the revised forms of assessment as related to the Program Learning Outcomes.

No changes to program-level assessment are proposed. The addition of the Beijing delivery location does not alter the MFin's existing assessment framework, course-level assessment methods, grading standards, academic-progression requirements, or graduation requirements.

Students at the Beijing delivery location will be assessed through York-approved course requirements and assessment methods equivalent to those used at Keele. A documented academic-equivalence protocol will identify the York course lead; common major-assessment and rubric expectations; permitted local discretion; approval of assessment changes; examination security; moderation and grade approval; review of samples of student work; and annual comparison of grade distributions, failure rates, academic-integrity matters, and Program Learning Outcome evidence across locations.

4. Resources

4.1 Describe any resource implications the proposed change may have and how they will be addressed. Attention should be paid to whether the proposed changes will be supported by a reallocation of existing resources or if new/additional resources will be required. If new/additional resources are required, provide a statement from the relevant Dean(s)/Principal confirming resources will be in place to implement the changes.

The proposed modification requires resources associated with operating the MFin at an additional delivery location. These resource implications include local facilities, student support, instructional staffing for an additional cohort, and potential travel by faculty and staff. No new curriculum development or program infrastructure at York University is required because the MFin, its courses, academic requirements, and governance structures already exist and remain unchanged.

The physical resources required for in-person delivery will be provided at Renmin University of China's Zhongguancun Campus in Beijing. Before recruitment or admission begins, the host-site review will confirm that the local classrooms, instructional technology, administrative facilities, learning resources, and student-access arrangements are appropriate for the approved in-person delivery model and the academic requirements of the MFin.

The new delivery location will require an on-the-ground logistical support function. Renmin's designated program and administrative personnel may assist with local orientation, classroom information, facilities-related questions, communications, and referral to the appropriate York or Schulich office. York University and Schulich will retain responsibility for all formal academic and student-support functions, including academic advising, registration and academic records, accommodations, examination deferrals, academic-integrity matters, grade-related processes, academic progression, appeals, and graduation clearance.

Before implementation, Schulich will establish a written student-service and escalation protocol. The protocol will identify the York or Schulich office responsible for each category of student matter, the limited role of on-site personnel, the channels for submitting requests, and the process for communicating decisions and follow-up actions to students. Student-support needs, feedback, and service issues will be monitored through York's and Schulich's established program and administrative processes.

Teaching the additional cohort will require staffing additional course sections. This need may be met through Schulich's existing roster of tenure-stream and adjunct or part-time faculty, subject to normal academic staffing and scheduling processes. If required to support the approved delivery model and projected enrolment, Schulich may also appoint additional tenure-stream or adjunct faculty through the University's established academic hiring and appointment processes. York University will retain responsibility for instructional quality and academic oversight. Approximately 50% of the teaching load will be delivered by instructors

nominated by Renmin University and approved by York University in accordance with York's applicable qualification, appointment, and quality-assurance requirements; the remaining teaching will be delivered by York-appointed instructors.

Staffing and scheduling for the Beijing location will be planned so that delivery of the additional cohort does not reduce the availability of required courses, materially restrict approved curricular options, or compromise instructional quality for students enrolled at Keele. Faculty travel and teaching assignments associated with Beijing delivery will be incorporated into normal academic staffing and workload planning. Any incremental staffing or replacement-teaching requirements identified through implementation planning will be incorporated into the final business case and resource plan before the first cohort is admitted.

The associated financial requirements will be managed through the applicable University, Faculty, School, and program budget structures. Before implementation, Schulich will complete a confidential business case identifying cohort targets, minimum viable enrolment, tuition and revenue arrangements, start-up and recurring costs, travel and replacement-teaching costs, currency and tax assumptions, downside scenarios, and financial responsibility for teach-out. The Dean has confirmed that the proposed modification may proceed through academic governance, on the condition that implementation remains contingent upon approval of the final business case through the applicable University and Faculty processes. The first Beijing cohort will not be admitted unless the approved business case demonstrates that the projected cohort can be delivered without compromising the academic quality or financial sustainability of the existing MFin.

5. Consultation

5.1 Summarize consultation undertaken with relevant academic units. Include in this summary a commentary on how the proposed changes could impact other programs. Provide individual statements from the relevant program(s) confirming consultation and support as appendices.

Consultation was undertaken with relevant Schulich academic and administrative stakeholders regarding the proposed addition of the Beijing delivery location. The consultation considered the academic rationale for the modification, its potential implications for the existing Keele-based MFin and other Schulich programs, maintenance of common curriculum and academic standards across locations, instructor qualifications and oversight, assessment equivalence, staffing and resource requirements, student services, market positioning, and operational implementation. Particular attention was given to ensuring that the additional location would remain fully integrated within York's academic governance and quality-assurance framework and would not reduce course access, instructional capacity, or student support at Keele. The feedback supported proceeding with the proposed delivery-location change and informed the provisions in this proposal concerning York's continuing academic authority, instructor

approval and course leadership, assessment moderation, student-service escalation, host-site review, cross-location quality monitoring, and implementation safeguards. It also reinforced the importance of clear accountability between York, Schulich, and the host institution before recruitment and delivery begin. Because the modification does not change the curriculum, Program Learning Outcomes, academic requirements, or delivery of the existing Keele MFin, no adverse impact on other programs is anticipated.

5.2 Summarize the consultation of the proposed modifications undertaken with current students and/or recent graduates.

Consultation with recent MFin graduates explored the attractiveness of a China-based delivery option, the factors that may lead prospective students to prefer studying in China or in Toronto, the importance of maintaining common academic standards and student supports, and the potential career value of a Schulich MFin delivered in China. The discussion also considered the influence of tuition and living costs, family and mobility considerations, access to employers and professional networks, and students' intended country of employment after graduation. The feedback identified a prospective student segment interested in an internationally oriented graduate finance credential while remaining connected to the Chinese employment market, as well as a distinct segment that continues to value studying in Canada, experiencing the Canadian academic environment, and developing Canadian professional networks. Graduates emphasized that the credibility of a China-based offering would depend on consistent academic standards, qualified instructors, effective student support, and a clear connection between the program and regional career opportunities. This consultation supports the view that a China-based location could broaden access without simply redirecting existing Keele applicants. The feedback has been used as qualitative evidence of student interest and market differentiation and is not treated as a substitute for enrolment and financial analysis.

5.2.1 Summarize any other internal and/or external consultation that demonstrate alignment of proposed program modifications with best practices and current needs (e.g. consultation with the Office of Institutional Planning and Analysis (OIPA), Office of the Vice Provost Teaching and Learning, industry groups, accrediting bodies, etc.). Include as appendices statements/letters of support from the relevant units/groups confirming consultation and support.

External consultation was undertaken with two Schulich MFin alumni who hold senior risk-management roles in the financial-services industry. They assessed the proposed addition of a China-based delivery location and provided letters of support in a personal capacity. Their consultation focused on the value of making the existing Schulich MFin available in China while preserving York's curriculum, learning outcomes, academic standards, and oversight.

The industry consultation identified China's position as a major financial and technology economy as a strong basis for the additional location. The assessments indicate that offering the MFin in China would broaden access to internationally oriented graduate finance

education, serve students who may not pursue study in Canada, and connect the program to the continuing development of China's financial sector. The consultation also identified opportunities to build relationships with regional students, alumni, industry practitioners, and employers; strengthen Schulich's visibility in China; and provide a platform for longer-term engagement in China. The addition of a China-based delivery location was viewed as valuable provided that Schulich maintains academic quality and demonstrates clear career value for students. The consultation letters are included in the Consultation and Support Letters appendix.

The Vice-Provost Academic authorized development of the major-modification proposal following review of the Notice of Intent. The response noted that the proposed additional delivery location aligns with York's commitment to expanding global connections and maintaining the currency and relevance of its academic programs. It also confirmed the expectation that the MFin remain fully a York University program, with York retaining responsibility for academic standards, instructional delivery, admissions, curriculum, and degree conferral. In developing the proposal, Schulich was asked to provide sufficient detail on the academic and operational arrangements at the proposed location in China, explain how York will maintain oversight of academic quality and the student experience, address the Quality Council's expectation regarding the host institution's quality-assurance environment, and provide evidence of student and labour-market demand for delivery in China. These matters are addressed throughout the proposal and will continue to guide implementation planning.

As part of implementation planning, Schulich will continue to engage the appropriate York offices on matters relevant to an international delivery location, including quality assurance, international partnerships, legal and regulatory considerations, privacy and cybersecurity, information technology, library resources, accessibility, risk management, student services, and financial planning. The scope and form of these consultations will follow the University's established processes, and any required confirmations will be obtained through the normal course of implementation.

Applicable Canadian and Chinese regulatory, institutional, and partnership requirements will be confirmed through the relevant York University and host-institution processes. Schulich will maintain an implementation record identifying the approval or agreement required, the responsible University or partner office, its status, and the stage of implementation to which it applies. Recruitment, admission, financial commitments to students, and delivery will proceed only when the approvals required for the relevant stage have been obtained. No student will be admitted to the Beijing location unless York University has confirmed that the approvals and institutional arrangements necessary to deliver the program to that cohort are in place.

Before recruitment or admission begins, an institutional agreement governing delivery at the Beijing location will be completed through the applicable York University approval processes. The agreement will define the respective responsibilities of York University, Schulich, and the

host institution and will preserve York University's authority over admissions, curriculum, Program Learning Outcomes, instructor approval, academic standards, assessment and grading, academic integrity, academic standing, appeals, academic records, quality assurance, and degree conferral. It will also address instructional and operational responsibilities, student administration and support, recruitment and communications, use of institutional names and intellectual property, information management and privacy, financial responsibilities, risk and insurance where applicable, dispute resolution, changes to the delivery arrangement, termination, and obligations to currently enrolled students.

Implementation planning will also consider appropriate continuity arrangements for students if circumstances affecting the partnership, regulatory environment, or delivery of a cohort change. Any such arrangements will be developed in accordance with York's established academic and administrative processes, with the objective of protecting students' ability to complete the approved program requirements.

Program descriptions, recruitment materials, and admissions communications for the Beijing location will be reviewed through the applicable York and Schulich processes. Communications will accurately describe the location and nature of the program and distinguish study in Beijing from physical study in Canada, including any implications for Canadian work authorization or immigration-related benefits. These matters will be addressed through normal implementation and partnership processes and do not alter the academic substance of the proposed delivery-location change.

Appendix: Consultation and Support Letters (5.1)

Subject: RE: Support for new delivery locations
Date: Wednesday, September 30, 2026 at 13:24:04 Eastern Daylight Time
From: David Elsner <delsner@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Hi Luke. I support both proposals.

Regards,
David

David Elsner, MBA, BA, BASc
Program Director, Master of Business Analytics (MBAN)
Adjunct Professor, Operations Management & Information Systems
Schulich School of Business, York University
delsner@schulich.yorku.ca | 647-998-1587

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: September 29, 2026 11:55 AM
To: David Elsner <delsner@schulich.yorku.ca>
Subject: Support for new delivery locations

Hi David,
Hope the Fall semester is off to a great start! I'm reaching out to seek your support for two proposals that will be considered separately: adding a new delivery location for the MBAN program at Renmin University's Beijing campus and a new delivery location for the MFin program at Renmin University's Shenzhen campus. The proposals are attached for your review.
If you are supportive, could you please indicate your support for each proposal separately, as they will be advanced independently?
Thank you for your consideration.

Best,
Luke

Subject: Re: Support for new delivery locations
Date: Tuesday, September 29, 2026 at 09:02:35 Eastern Daylight Time
From: Mehmet Murat Kristal <mkristal@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Hi Luke:

Likewise. I support both of the proposals. Good luck!!!

Best,

Murat

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Date: Tuesday, September 29, 2026 at 8:50 AM
To: Mehmet Murat Kristal <mkristal@schulich.yorku.ca>
Subject: Support for new delivery locations

Hi Murat,
It was great connecting with you yesterday! I'm reaching out to seek your support for two proposals that will be considered separately: adding a new delivery location for the MBAN program at Renmin University's Beijing campus and a new delivery location for the MFin program at Renmin University's Shenzhen campus. The proposals are attached for your review.
If you are supportive, could you please indicate your support for each proposal separately, as they will be advanced independently?
To clarify, these two proposals are for offering MBAN and MFin with Renmin University in Beijing and Shenzhen. I am still putting together the proposals for MMAI and TechMBA.
Thank you for your consideration.

Best,
Luke

Monday, September 28, 2026 at 1:56:01 PM Eastern Daylight Time

Subject: RE: Support for new delivery locations
Date: Monday, September 28, 2026 at 10:41:54 Eastern Daylight Time
From: Ming Dong <mdong@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Hi Luke,

You have my support for the new delivery location for the MBAN program at Renmin University, Beijing.

I already gave support to Melanie for the new delivery location for the MFIN program in Shenzhen.

Best regards,
Ming

Ming Dong
Professor of Finance / Area Coordinator, Finance
Schulich School of Business
York University
Toronto, Canada

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: September 25, 2026 6:24 AM
To: Ming Dong <mdong@schulich.yorku.ca>
Subject: Support for new delivery locations

Hi Ming,
Hope the Fall semester is off to a great start! I'm reaching out to seek your support for two proposals that will be considered separately: adding a new delivery location for the MBAN program at Renmin University's Beijing campus and a new delivery location for the MFin program at Renmin University's Shenzhen campus. The proposals are attached for your review.
If you are supportive, could you please indicate your support for each proposal separately, as they will be advanced independently?
Thank you for your consideration.

Best,
Luke

Subject: Support for proposed new delivery location of MFIN at Renming
Date: Thursday, September 24, 2026 at 16:28:51 Eastern Daylight Time
From: Chris Bell <cbell@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Hi Luke

I have reviewed and fully support the proposal for the new delivery location at Renmin University's Shenzhen campus for the MFIN program. This is an exceptionally detailed and well thought out strategy. I do believe and agree that this will be a valuable program for Schulich and York, raising our global profile. Having the option for students to attend the program in China is an important consideration, and is one that will no doubt help ensure the program's success. There are so many western universities partnering with schools in China that the proposal to deliver on site in China is essential to remaining competitive in that market.

Thank you for all the hard work and effort you and others have done to secure this program, and our foothold in a valuable market.

Best
Chris

_____

Dr. Chris M. Bell, Professor, Organization Studies

N303E Schulich School of Business, York University
4700 Keele Street
Toronto, Ontario CANADA
M3J 1P3

Thursday, September 24, 2026 at 9:31:30 AM Eastern Daylight Time

Subject: RE: Support for new delivery locations
Date: Thursday, September 24, 2026 at 09:13:11 Eastern Daylight Time
From: Maxim Voronov <mvoronov@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>
Attachments: image001.jpg

Hi Luke,

Re: Beijing campus proposal – it is excellent. I support it fully.

Re: Shenzhen campus proposal – it is excellent. I support it fully.

Best,
Maxim

Maxim Voronov, Ph.D. (he/him)
Professor of Sustainability and Organization

Senior Editor, *Organization Studies*

Schulich School of Business, York University
Room G 327 | 4700 Keele Street
Toronto, Ontario
Canada M3J 1P3
Email: mvoronov@schulich.yorku.ca | http://maximvoronov.net



From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: September 24, 2026 7:27 AM
To: Maxim Voronov <mvoronov@schulich.yorku.ca>
Subject: FW: Support for new delivery locations

Hi Maxim,
Hope the Fall semester is off to a great start! I'm reaching out to seek your support for two proposals that will be considered separately: adding a new delivery location for the MBAN program at Renmin University's Beijing campus and a new delivery location for the MFin program at Renmin University's Shenzhen campus. The proposals are attached for your review.
If you are supportive, could you please indicate your support for each proposal separately, as they will be advanced independently?
Thank you for your consideration.

Subject: RE: Support for new delivery locations
Date: Thursday, September 24, 2026 at 09:20:16 Eastern Daylight Time
From: Melanie Cao <mcao@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>
Attachments: 2026 Sept MFIN new delivery location proposal.docx, 2026 Sept MBAN new delivery location proposal.docx

Luke,

You have my full support. I have signed the two documents.

Melanie Cao
Professor of Finance
Director of Master of Finance
Schulich School of Business
York University

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: September 24, 2026 8:56 AM
To: Melanie Cao <mcao@schulich.yorku.ca>
Subject: Support for new delivery locations

Hi Melanie,
Hope the Fall semester is off to a great start! I'm reaching out to seek your support for two proposals that will be considered separately: adding a new delivery location for the MBAN program at Renmin University's Beijing campus and a new delivery location for the MFin program at Renmin University's Shenzhen campus. The proposals are attached for your review.
If you are supportive, could you please indicate your support for each proposal separately, as they will be advanced independently?
Thank you for your consideration. Sincerely,

Best,
Luke

Subject: Re: support for new delivery location
Date: Thursday, September 24, 2026 at 07:34:46 Eastern Daylight Time
From: Kiridaran Kanagaretnam <kkanagaretnam@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Hi Luke,
No need. I support both proposals.
Regards,
Giri

Get Outlook for Android

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: Thursday, 24 September 2026 07:32:49
To: Kiridaran Kanagaretnam <kkanagaretnam@schulich.yorku.ca>
Subject: support for new delivery location

Hi Giri,
Kathryn just told me that the new delivery location proposal for mban and mfin should be separate. Can I send you the proposals for your support again? Thanks a lot!

Luke

Subject: Re: Support for new delivery location for mban and mfin
Date: Thursday, September 24, 2026 at 07:50:53 Eastern Daylight Time
From: Ruodan Shao <rshao@schulich.yorku.ca>
To: Luke Zhu <lukezhu@schulich.yorku.ca>

Yes, of course! Happy to support both proposals!

Get Outlook for iOS

From: Luke Zhu <lukezhu@schulich.yorku.ca>
Sent: Thursday, 24 September 2026 07:33:13
To: Ruodan Shao <rshao@schulich.yorku.ca>
Subject: Support for new delivery location for mban and mfin

Hi Ruodan,
Kathryn just told me that the new delivery location proposal for mban and mfin should be separate. Can I send you the proposals for your support again? Thanks a lot!

Luke

The Senate of York University

Meeting Synopsis

The 731st Meeting of Senate held on Thursday, 22 October 2026

Remarks

The Chair welcomed new and returning members to the 731st meeting of Senate. Senators were advised that an organizational chart illustrating Senate within the bicameral governance structure will be added to the orientation materials and presented as a reference at the next meeting. An update on the Presidential search was provided, noting that community consultation has concluded and the position profile is being finalized.

Consent agenda items were deemed approved, with a minor correction to the attendance list in the minutes of the 24 September 2026 meeting.

President

Lisa Philipps, Interim President and Vice-Chancellor, highlighted the launch of the new University Academic Plan, the start of work to refresh York's brand and communication strategy, and the School of Medicine's accreditation site visits, with provisional accreditation being sought by 1 June 2027. She reported on her advocacy in Ottawa, where York's focus on ethical applications of AI is generating government interest, and on upcoming travel to the Falling Walls Science Summit in Germany and to India. She also noted $10 million in new Wellcome Trust funding for the Global Strategy Lab and York's selection to chair a COU working group on combating hate on campuses.

Inquiries & Communications

A report from the Academic Colleague to the Council of Ontario Universities (COU) was received for information. A synopsis of the 29 September 2026 meeting of the Board of Governors was received for information.

Approvals

On the recommendation of the Senate Executive Committee, Senate approved:

- candidates for election to Senate committees and sub-committees (non-designated seats) for the term of 1 July 2026 - 30 June 2029.
- revisions to the Senate Policy on Academic Implications of Disruptions or Cessation of University Business Due to Labour Disputes or Other Causes, including its renaming as the Senate Policy on Managing the Impact of Disruptions on Academic Activities, effective 23 October 2026.

The Senate of York University Synopsis

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

- a Pass/Fail grading scheme for the three-term Bachelor of Education (BEd) degree program, housed in the Faculty of Education, effective May 2027.
- changes to the degree requirements for the Master of Accounting (MAcc) program, housed in the Schulich School of Business, effective May 2027.

Referrals

A recommendation for Senate to approve the Undergraduate Degree Framework was referred back to the Academic Standards, Curriculum and Pedagogy Committee to consider reflections and suggestions from Senate.

Notice of Statutory Motions

Executive Committee

The Senate Executive Committee provided Notice of Statutory Motion for Senate to approve a minor revision to the Rules of Senate to remove the now former Vice-Provost Teaching & Learning position from the composition of the Academic Standards, Curriculum and Pedagogy Committee.

Committee Information Items

Executive Committee

Information items included the following:

- Approval of student members to Senate committees for the 2026-2027 governance year, as nominated by the student senator caucus.
- Executive Committee's priorities for 2026-2027, as set out in an appendix to the report.
- Approval of changes to the Faculty Council Rules and Procedures of the Faculty of Health.
- The Committee has begun its review of Senators' survey input to identify actions to enhance Senate governance.
- Call for expressions of interest to fill the remaining vacancies on ASCP and the Senate Tenure and Promotions Appeals Committee.

The Senate of York University Synopsis

Academic Policy, Planning and Research Committee (APPRC)

Information items included the following:

- The Committee's continuing discussion of its priorities for 2026-2027, including support for a strategic academic planning initiative for the Markham campus and, possibly in collaboration with ASCP, an assessment of the impact of AI on research, teaching and learning.
- A briefing from the Deputy Provost Markham on programming, enrolments and forward-looking plans for the Markham campus.
- The start of the 2027-2028 budget consultation process, for which the Committee provided input on the form and substance of the presentation to Faculty Councils.
- A report from the Vice-President Research & Innovation on major research funding activities this fall, including the 2027 Canada Foundation for Innovation Fund competition and the allocation of four additional Canada Research Chairs to the University.
- Senators' questions from the September meeting on the Y-Bridge program and defence-related research, with APPRC to report back to Senate in November.

Academic Standards, Curriculum and Pedagogy Committee (ASCP)

Information items included:

- Minor modifications to degree requirements for programs housed in Education, Lassonde, LA&PS, and Osgoode, and Faculty regulations in FGS and Lassonde.
- Confirmation of Professor Marlene Bernholtz as Chair of ASCP for 2026-2027, with thanks to Professor Jeffrey Harris for his service as Acting Chair.
- The addition of Professors Jeffrey Harris (Lassonde) and Karin Page-Cutrara (Health) to the Coordinating & Planning Subcommittee.
- The Committee's continuing discussion of its priorities for the year, which will include the review of several academic policies, moving forward the Senate approved conversion to the 4.0 grade scale for undergraduate degree programs, generative AI, and modes of course delivery.
- The Committee's review of the Pass/Fail and Credit/No-Credit Grades Policy, in effect since 1 September 2026, with revisions to follow that recognize the program-level grading approach in the BEd and address issues identified in the first term of implementation.

The Senate of York University Synopsis

Academic Policy, Planning and Research Committee (APPRC) & Academic Standards, Curriculum and Pedagogy Committee (ASCP)

Senate received the June 2026 Report of the Joint Sub-Committee on Quality Assurance.

Additional Information about this Meeting

Please refer to the full Senate agenda of **22 October 2026** for further details on the items reported.

The next regular meeting of Senate will be held in-person in the Dr Robert Everett Senate Chamber at **2:30pm on Thursday, 26 November 2026.**

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: David Johnston , Director, Master of Supply Chain Management program
Date: October 14 2026
Re: Changes to Subject Code (Rubric), Course Number, Title and Description for MSTM 5000 Business Communication and Team Dynamics

Motion: That Faculty Council approves that the Subject Code (Rubric), Course Number and Title for MSTM 5000 Business Communication and Team Dynamics be changed to OMIS 5050 Managing Communication and Team Dynamics and the Academic Calander Description Be Updated

Rationale: MSTM 5000 was originally developed for the Master of Management program and under the supervision and staffing of the Organization Studies area at SSB. The course was subsequently adopted as a component of the Master of Supply Chain Management program (MSCM). The course has continued to evolve and be customized for the professionalization of students in the MSCM. In structors have been sourced by the Director of the MSCM program under the supervision of the Op erations Management and Information Systems (OMIS) area coordinator. The change of prefix ac knowledges that line of responsibility for this course. In addition, we have changed the title and the academic calendar description to better capture the essence of the course. This course is taken exclu sively by MSCM students but reflects changes elsewhere in SSB to increase the experiential and ca reer skill building across programs. The overall learning objectives expressed in the course outline re main unchanged.

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

Schulich School of Business

Program: Master of Supply Chain Management

Degree Designation: Graduate degree

Type of Modification: Minor Modification

Location: York University, Keele Campus

Effective Date: Summer 2027

Approval Date at Faculty Council:

---

1. Describe the proposed modifications to the program.

Revision of the program handbook copy to reflect a change in the course code to a term 1 core course, from MSTM 5000 to OMIS 5050.

2. Provide a rationale for the proposed modifications.

The course is to be assumed under the management of the Operations Management and Information Systems area at Schulich School of Business, York University. That requires a change of Subject Code (Rubric), Course Number from MSTM 5000 to OMIS 5050.

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

The program learning outcomes will be maintained. The course learning outcomes remain unchanged, so the course's role in preparing students to meet the program learning outcomes is consistent.

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

There is no need to accommodate current students. A course credit exclusion has been added between MSTM 5000 and OMIS 5050 so that students who have already completed the course as MSTM 5000 will not be able to enrol in OMIS 5050.

(Revised: December 17, 2024)

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.

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

The area coordinator of Operations Management and Information Systems (OMIS) and the Associate Dean Academic have been consulted and are supportive of the change. Schulich administrative offices that are affected by the change have been informed. Program directors of master's programs at Schulich are consulted through the program committee approving the proposals.

APPENDIX

Attach a Side-by-Side Academic Calendar Copy Comparison

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

Existing Program/ Diploma/Certificate Information (Change From):	Proposed Program/ Diploma/Certificate Information (Change To):
Title Master of Supply Chain Management Program Requirements Group 1: Foundational Courses • ~~MSTM 5000 3.00 BUSINESS COMMUNICATION AND TEAM DYNAMICS~~ • MSTM 5060 3.00 MANAGERIAL DECISION ANALYSIS	Title Master of Supply Chain Management Program Requirements Group 1: Foundational Courses • OMIS 5050 3.00 MANAGING COMMUNICATION AND TEAM DYNAMICS • MSTM 5060 3.00 MANAGERIAL DECISION ANALYSIS

(Revised: December 17, 2024)

• ACTG 5200 3.00 FINANCIAL DECISIONS FOR MANAGERS • MKTG 5200 3.00 MARKETING MANAGEMENT • OMIS 5212 3.00 DESIGN AND MANAGEMENT OF ORGANIZATIONAL PROCESSES *OMIS 5212 3.00 previously known as MSTM 5210 3.00* Group 2: Functional Courses • OMIS 6200 3.00 SUSTAINABLE SUPPLY CHAIN STRATEGIES • OMIS 6210 3.00 TRANSPORTATION AND LOGISTICS MANAGEMENT • OMIS 6220 3.00 SUPPLY RELATIONSHIP MANAGEMENT • OMIS 6230 3.00 COORDINATING DEMAND AND SUPPLY Group 3: Applied Learning Courses • OMIS 6300 1.50 MANAGING CHANGE IN SUPPLY CHAINS • OMIS 6310 3.00 MANAGING INTERNATIONAL TRADE IN SUPPLY CHAINS • OMIS 6320 3.00 MANAGING DIGITAL SUPPLY CHAIN TECHNOLOGY • OMIS 6400 4.50 SUPPLY CHAIN CONSULTING PROJECT	• ACTG 5200 3.00 FINANCIAL DECISIONS FOR MANAGERS • MKTG 5200 3.00 MARKETING MANAGEMENT • OMIS 5212 3.00 DESIGN AND MANAGEMENT OF ORGANIZATIONAL PROCESSES *OMIS 5212 3.00 previously known as MSTM 5210 3.00* Group 2: Functional Courses • OMIS 6200 3.00 SUSTAINABLE SUPPLY CHAIN STRATEGIES • OMIS 6210 3.00 TRANSPORTATION AND LOGISTICS MANAGEMENT • OMIS 6220 3.00 SUPPLY RELATIONSHIP MANAGEMENT • OMIS 6230 3.00 COORDINATING DEMAND AND SUPPLY Group 3: Applied Learning Courses • OMIS 6300 1.50 MANAGING CHANGE IN SUPPLY CHAINS • OMIS 6310 3.00 MANAGING INTERNATIONAL TRADE IN SUPPLY CHAINS • OMIS 6320 3.00 MANAGING DIGITAL SUPPLY CHAIN TECHNOLOGY • OMIS 6400 4.50 SUPPLY CHAIN CONSULTING PROJECT

(Revised: December 17, 2024)

Schulich
School of Business
York University

Course Change Proposal Form
Schulich School of Business

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

1. Responsible Program: Master of Supply Chain Management

2. Responsible Unit: Organization Studies

3. Subject Code (Rubric) and Course Number: MSTM 5000

4. Credit Value: 3.00

5. Long Course Title: Business Communication and Team Dynamics

6. Short Course Title: Business Communication and Team Dynamics

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

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

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

9. Rationale: MSTM 5000 was originally developed for the Master of Management program and under the supervision and staffing of the Organization Studies area at SSB. The course was subsequently adopted as a component of the Master of Supply Chain Management program (MSCM). The course has continued to evolve and be

customized for the professionalization of students in the MSCM. Instructors have been sourced by the Director of the MSCM program under the supervision of the Operations Management and Information Systems (OMIS) area coordinator. The change of prefix acknowledges that line of responsibility for this course. In addition, we have changed the title and the academic calendar description to better capture the essence of the course. This course is taken exclusively by MSCM students but reflects changes elsewhere in SSB to increase the experiential and career skill building across programs. The overall learning objectives as expressed in the course outline remain unchanged.

10. Proposed Course Information:

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

Existing Course Information (Change From):	Proposed Course Information (Change To):
~~MSTM 5000 Business~~ Communication and Team Dynamics ~~This course provides students with the opportunity to hone important management and leadership competencies in the areas of communication and team building. Since contemporary business environments have moved to flatter, team-based structures, managers must be able to communicate clearly and persuasively to facilitate creative collaboration. The ability to think strategically about all forms of communication with diverse audiences is essential for professional advancement. As well, the ability to understand how groups and teams function, and the factors causing team success or failure, is essential in the modern workplace. Therefore, the aim of this course is to develop knowledge of effective oral and written communication techniques and to demonstrate how such communication skills intersect with positive team strategies and practices, such as problem-solving and decision-making. The course uses a workshop format that relies heavily on in-class experiential learning, including small group exploration, class discussions, self-~~	OMIS 5050 Managing Communication and Team Dynamics This course prepares students for successful careers in Supply Chain Management by strengthening oral and written communication skills, career planning strategies, and team effectiveness. Using interactive lectures, experiential learning, simulations, group exploration, discussions, and strengths-based feedback, students develop techniques for effective workplace communication, collaboration, and managing team dynamics.

~~assessments and peer feedback, to develop skills in communication and the management of team dynamics.~~	

11. Enrolment Notes: This course is limited to students enrolled in the MSCM program.
Is the course limited to a specific group of students; closed to a specific group of students; and/or if there is any additional information necessary for the student to know before enrolling.

12. Consultation: Requested by the Associate Dean Academic in consultation with the Operations Management and Information Systems area coordinator.
For changes in integrations and cross-listings, as well as changes to courses that are integrated and/or cross-listed, please provide evidence that appropriate consultation has taken place.

Originator:

David Johnston	October 14 2026
Signature	Date
David Johnston	OMIS area
Name	Area or Specialization

Approvals:

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

Adam Diamant	October 14, 2026
Signature	Date
Adam Diamant	Operations Management and Information Systems
Name	Area or Specialization

Schulich
School of Business
York University

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

David A. Johnston	October 14 2026
Signature	Date
David Johnston	Master of Supply Chain Management
Name of Program Director	Program

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

Signature	Date
Kevin Tasa	Master Programs Committee
Name of Committee Chair	Committee

Schulich School of Business York University

Schulich School of Business

COURSE DIRECTOR ADMIN

OMIS 5050 S2026 CREDITS: 3.00

OMIS 5050 - MANAGING COMMUNICATION & TEAM DYNAMICS

TUE 18:30 - 21:20 SSB N108

TUE 18:30 - 21:20 SSB N108

Office Hours
By appointment

This course is intended for Schulich students enrolled in the MSCM program.

ANTHONY FERREIRA - INSTRUCTOR

Anthony Ferreira is the Associate Director of the George Weston Ltd. Centre for Sustainable Supply Chains. He brings more than 8 years of experience at Schulich advancing supply chain education and research initiatives through collaboration with faculty, students, alumni, and corporate partners. His background in education spans over a decade and includes curriculum development, program design, and instructional experience at the secondary and post-secondary levels. He holds a M.A., English, from the University of Guelph and a B.A., English Literature, from York University.

MARK FEDERMAN - INSTRUCTOR

Mark's passion is understanding the dynamics at the intersection of organizations and their people, and discovering ways to bring out the best in both. He employs a unique mix of art and science to quickly and efficiently guide teams, working groups, and entire organizations to discover new ideas, insights, and innovation—what they haven't thought of after they've thought of everything they can think of. His unique approaches to team and group dynamics draw from reading between the lines and picking up patterns in the way people talk and think that reveal deep underlying truths. And he can align disparate factions from all over an organization to help them string together a story to explain and understand their current situation, and set a course for a desired future.
Mark brings to this work a toolkit full of techniques, methods, and practices, many of which he invented or modified. His skill has been honed through more than three decades of facilitation, coaching, in-the-field management and leadership, and formal post-secondary teaching.
His experience comes from 20 years in the IT industry, 6 years doing Masters and Doctoral work at OISE (University of Toronto) and 15 years of coaching executives and organizations to become their best selves. Over the years, some of his clients include: Green Mountain/Keurig, Brinks Security, Economical Mutual Insurance, Coffee Bean Technology,

Schulich School of Business York University

Blommer Chocolate, Elizabeth Lauder, Ketchum Communications, Unit 7 Marketing, Miles Nadel JCC, Ministry of Health, Novo Nordisk, Novartis, Audi, Fairmont Hotels and Resorts, Raffles Hotels and Resorts, Rogers Communications, Women in Film and Television, Lakeridge Health, Ontario Shores, Centre for Training in Psychotherapy, UNESCO, Ars Electronica, Government of Canada National Managers Community, City of Brampton, Durham College, Ontario University Institute of Technology.
Previously, Mark had a senior academic leadership role and was faculty at Adler Graduate Professional School. Prior to that, he was Chief Strategist at the McLuhan Program in Culture and Technology at University of Toronto. He currently teaches Persuasion and Facilitation in the Psychology program at University of Guelph-Humber as well as Case Studies and Qualitative Methods. Mark also teaches Qualitative Research at OISE/University of Toronto. And he is a member of the inaugural faculty for the Master of Supply Chain Management at Schulich School of Business at York University, teaching the Business Communication and Team Dynamics course.

BRIEF DESCRIPTION

This course prepares students for successful careers in Supply Chain Management by strengthening oral and written communication skills, career planning strategies, and team effectiveness. Using interactive lectures, experiential learning, simulations, group exploration, discussions, and strengths-based feedback, students develop techniques for effective workplace communication, collaboration, and managing team dynamics.

COURSE LEARNING OUTCOMES

This course focuses on two distinct, yet related skills: 1) the ability to communicate strategically in a business context and 2) the ability to design and contribute to effective teams. At the completion of this course, you should be able to:

1. Think strategically about the various forms of communication needed to interact successfully with others in the business world and communicate your written and verbal ideas clearly and concisely.
2. Create a variety of business documents (memoranda, letters, emails and reports) with logical and persuasive reasoning adapted for the specific audience.
3. Confidently deliver professional presentations.
4. Understand the consequences of team formation and development processes.
5. Engage in effective teamwork behaviors and conflict resolution through increased self-awareness and interpersonal problem-solving.
6. Access thorough knowledge of key team processes and outcomes.

COURSE MATERIAL

A number of additional reading materials have been prepared and are posted on CANVAS. Students are expected to have read the assigned readings before attending each class session. Harvard Business Review no longer allows us to post links to articles on the e-

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

Finding Harvard Business Review Articles from a Citation

Harvard Business Review articles can be found using the library web site. Click on this URL: http://researchguides.library.yorku.ca/HBR (http://researchguides.library.yorku.ca/HBR)
Type the article's title in the top left search box and you will then be able to access a PDF version of the article in the EBSCOhost database.

This course requires readings from a variety of sources, the links to which will be posted on the course Canvas site.

COURSE GEN-AI STATEMENT

Please refer to York's GenAI Policy (https://www.yorku.ca/teachingandlearning/gen-ai/for-students/#policy) .

Schulich School of Business
York University

ASSIGNMENT SUMMARY

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Course Module - Professional Communication and Career Development (Weeks 1 -3) 15%			
Assignment: Résumé & LinkedIn Profile	Individual	2%	Mon May 11, 2026 at 11:59pm EDT
Graded Reflection: Supply Chain Simulation	Individual	1%	Wed May 6, 2026 at 11:59pm EDT
Graded Reflection: Industry Guest Speaker	Individual	1%	Mon May 18, 2026 at 11:59pm EDT
Graded Reflection: Positioning Statement (Elevator Pitch)	Individual	1%	Mon May 18, 2026 at 11:59pm EDT
Assignment: Career Development Roadmap	Individual	5%	Mon May 25, 2026 at 11:59pm EDT
Assignment: Final Résumé	Individual	5%	Mon May 25, 2026 at 11:59pm EDT
Article Reflections 5%			
Article Reflection	Individual	5%	Tue Jun 30, 2026 at 11:59pm EDT
Teknosport Case 10%			
Teknosport Case - Presentation to the Board (10%); Group - PowerPoint Submission	Group	10%	Tue Jun 9, 2026 at 06:00pm EDT
The Impossible Case Team Challenge 25%			
The Impossible Case Team Challenge - Part 1: Presentation (PowerPoint Submission)	Group	14.81%	Tue Jul 7, 2026 at 07:50pm EDT
The Impossible Case Team Challenge - Part 2: Reflection	Individual	10.19%	Tue Jul 14, 2026 at 11:59pm EDT
Real Workplace Case Study 30%			
Real Workplace Case Study - Part 1: Presentation (10%; PowerPoint Submission)	Group	10%	Tue Jul 14, 2026 at 06:00pm EDT
Real Workplace Case Study - Part 2: Briefing Summary (10%)	Group	10%	Tue Jul 14, 2026 at 06:00pm EDT
Real Workplace Case Study - Part 3: Process Reflection (10%)	Individual	10%	Tue Jul 21, 2026 at 11:59pm EDT

Assignment | Task	Group | Individual	Total % of Final Grade	Due Date
Session Responses and Contributions 15%			
Presentation Style and Storytelling Discussion	Individual	1%	Mon Jun 1, 2026 at 11:59pm EDT
Leo Burnett Case Presentation - PowerPoint Submission	Group	3%	Tue Jun 16, 2026 at 06:00pm EDT
Leo Burnett Case Briefing Summary - Document Submission	Group	3%	Tue Jun 16, 2026 at 06:00pm EDT
Live Coaching Practice	Individual	3%	Tue Jun 9, 2026 at 06:30pm EDT
Bohm Dialogue Practice	Group	3%	Tue Jun 30, 2026 at 11:59pm EDT
RWCS Groups Acknowledgements	Individual	2%	Tue Jul 21, 2026 at 11:59pm EDT

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%

WRITTEN ASSIGNMENTS: DESCRIPTIONS

Assignment: Résumé & LinkedIn Profile .

Due Date: Mon May 11, 2026 at 11:59pm EDT

Submit the following two items by the due date listed. Submitting both items is a prerequisite for receiving instructor feedback. A passing grade requires a complete, thoroughly proofread, good-faith attempt at each deliverable.

1. Updated LinkedIn Profile — Update your LinkedIn profile in line with the recommendations provided, ensuring all sections are up to date (professional photo, work history, and education). Submit your profile URL. Please test the URL to ensure it is your correct profile link before submitting. If you don't know where to find your profile URL, see this

link. (https://www.linkedin.com/help/linkedin/answer/a522735)

2. Updated Résumé - Using the Schulich résumé template (provided below), create a *NEW* résumé which best highlights your skills, experiences, and accomplishments. When your résumé is complete, up to date, and thoroughly proofread, upload it in Word format (.doc, .docx).

Submissions that do not use the Schulich résumé template will receive a grade of zero on this assignment.

Required Template - Schulich Résumé Template
(https://schulich.instructure.com/courses/14294/files/1683053?location=course_syllabus_14294&verifier=vA7h96qbkFzYJyCiGt2qk057td0jV0Oj6V66izfV&wrap=1)
(https://schulich.instructure.com/courses/14294/files/1683053/download?location=course_syllabus_14294&verifier=vA7h96qbkFzYJyCiGt2qk057td0jV0Oj6V66izfV&download_frd=1)

Additional resources

- (https://schulich.instructure.com/courses/14294/files/1683053?location=course_syllabus_14294&verifier=vA7h96qbkFzYJyCiGt2qk057td0jV0Oj6V66izfV&wrap=1) CCD Résumé Guidelines (https://schulich.instructure.com/courses/14294/files/1683054?location=course_syllabus_14294&verifier=WKdF1ZuQEzg52M7jdpciDHLBV4yCo9po5OMyhxBy&wrap=1) (https://schulich.instructure.com/courses/14294/files/1683054/download?location=course_syllabus_14294&verifier=WKdF1ZuQEzg52M7jdpciDHLBV4yCo9po5OMyhxBy&download_frd=1)
- (https://schulich.instructure.com/courses/14294/files/1683054?location=course_syllabus_14294&verifier=WKdF1ZuQEzg52M7jdpciDHLBV4yCo9po5OMyhxBy&wrap=1) Developing a Résumé (MSCM Information Hub) (https://schulich.instructure.com/courses/14325/pages/developing-a-resume?module_item_id=649456)
- MSCM Résumé Tips (MSCM Information Hub) (https://schulich.instructure.com/courses/14325/pages/developing-a-resume-resume-tips?module_item_id=649457)
- LinkedIn Tips (MSCM Information Hub) (https://schulich.instructure.com/courses/14325/pages/developing-a-linkedin-profile?module_item_id=649458)

Graded Reflection: Supply Chain Simulation.

Due Date: Wed May 6, 2026 at 11:59pm EDT

The Beer Game simulation introduces you to the dynamics that define supply chain work. This reflection asks you to connect what you observed to your own development as a supply chain professional.

Submit a ~150-200 word reflection to the discussion thread below using the provided prompts as a guide. You may write in paragraphs or bullets. There are no correct answers. I am interested in your genuine observations and what they mean for you. After posting, read at least two classmates' responses.

Reflect on any of the following:

- What did you observe about how supply chain dynamics work and what surprised you?
- What kinds of decision-making tendencies did you notice in yourself when playing the game?
- How did information sharing (or the lack of it) shape outcomes? What does this suggest about the communication skills supply chain professionals need?
- For students with supply chain work experience: How did the game dynamics mirror or differ from

your own professional experience? What would have been different if this was a real-life scenario?

If you were absent or unable to participate in the Beer Game:

Based on your understanding of supply chain management, why is the efficient flow of information so important to ensure good decisions get made across the supply chain? What are the potential consequences when communication is poor or lacking? If possible, share an example from your own experience or from the news.

Graded Reflection: Industry Guest Speaker.

Due Date: Mon May 18, 2026 at 11:59pm EDT

Submit a ~150-200 word reflection to the discussion thread below, identifying your key insights from the Week 2 industry guest speaker session and connecting them to your career direction or job search strategy. After submitting your post, read at least two classmates' posts to advance your own understanding. (Note: You are welcome and encouraged to respond to your classmates' posts, but this is not required or considered for grading purposes.)

Reflect on any of the following:

- What was your biggest takeaway from the session?
- Was there a particular comment, story, or observation that resonated with you, and why?
- Did the session prompt any new thinking about your career direction, positioning, or next steps? If so, how?
- What will you do differently, or what will you look into further, based on what you heard (for example, adjusting your approach, taking actions, performing further research, etc.).

Graded Reflection: Positioning Statement (Elevator Pitch).

Due Date: Mon May 18, 2026 at 11:59pm EDT

Submit a ~150-200 word positioning statement (elevator pitch) to the discussion thread below. Your statement should read as a natural, confident self-introduction - the kind you might deliver at a networking event or recruitment fair, and should align with the career direction outlined in your Career Development Roadmap. After submitting your post, read at least two classmates' posts to advance your own understanding. (Note: You are welcome and encouraged to respond to your classmates' posts, but this is not required or considered for grading purposes.)
Keep it concise and highlight only the most relevant details. A strong positioning statement communicates:

- **Who you are** - your name, current program, and brief summary of the educational and work experiences relevant to your desired direction.
- **Where you want to go** - your desired next step including target function, role, industry, and/or employer as well as any relevant context about what you're pursuing.
- **What you bring** — a few relevant strengths, experiences, or skills that support your direction and make a compelling case for the next step you are pursuing.

- **What you are seeking** - a conversation, advice, information, or a specific opportunity.

Before submitting, proofread your statement to ensure it presents a clear, coherent narrative that would make sense to someone hearing it for the first time.

Assignment: Career Development Roadmap.

Due Date: Mon May 25, 2026 at 11:59pm EDT

Throughout weeks 1 - 3, students will complete a personalized Career Development Roadmap, a structured planning document that supports reflection on career direction, self-assessment of skills, and identification of concrete next steps toward their career goals. Upload the completed Career Development Roadmap (https://schulich.instructure.com/courses/14294/files/1693028?location=course_syllabus_14294&verifier=xejzYWwqFSWONS4pBAHLshM5FX3Jpd9xvZqcwK8y&wrap=1) (https://schulich.instructure.com/courses/14294/files/1693028/download?location=course_syllabus_14294&verifier=xejzYWwqFSWONS4pBAHLshM5FX3Jpd9xvZqcwK8y&download_frd=1) document ensuring that all sections have been completed. Submit the document in Word format (.doc/docx). This assignment is graded for completion and demonstrated good-faith effort.

Assignment: Final Résumé.

Due Date: Mon May 25, 2026 at 11:59pm EDT

Revise your résumé based on the instructor feedback you've received and make any other adjustments needed.
Your final résumé should be thoroughly error-free, and where appropriate, tailored to your target role and desired career direction as defined in your Career Development Roadmap.
When your résumé is complete, up to date, and thoroughly proofread, upload it in Word format (.doc, .docx). Submissions that do not use the Schulich résumé template will receive a grade of zero on this assignment.
Required Template - Schulich Résumé Template (https://schulich.instructure.com/courses/14294/files/1683053?location=course_syllabus_14294&verifier=vA7h96qbkFzYJyCiGt2qk057td0jV0Oj6V66izfV&wrap=1) (https://schulich.instructure.com/courses/14294/files/1683053/download?location=course_syllabus_14294&verifier=vA7h96qbkFzYJyCiGt2qk057td0jV0Oj6V66izfV&download_frd=1)

Additional resources

- (https://schulich.instructure.com/courses/14294/files/1683053?location=course_syllabus_14294&verifier=vA7h96qbkFzYJyCiGt2qk057td0jV0Oj6V66izfV&wrap=1) CCD Résumé Guidelines (https://schulich.instructure.com/courses/14294/files/1683054?location=course_syllabus_14294&verifier=WKdF1ZuQEzg52M7jdpciDHLBV4yCo9po5OMyhxBy&wrap=1) (https://schulich.instructure.com/courses/14294/files/1683054/download?location=course_syllabus_14294&verifier=WKdF1ZuQEzg52M7jdpciDHLBV4yCo9po5OMyhxBy&download_frd=1)
- (https://schulich.instructure.com/courses/14294/files/1683054?location=course_syllabus_14294&verifier=WKdF1ZuQEzg52M7jdpciDHLBV4yCo9po5OMyhxBy&wrap=1) Developing a Résumé (MSCM Information Hub) (https://schulich.instructure.com/courses/14325/pages/developing-a-resume?module_item_id=649456)
- MSCM Résumé Tips (MSCM Information Hub)

(https://schulich.instructure.com/courses/14325/pages/developing-a-resume-resume-tips?module_item_id=649457)

- LinkedIn Tips (MSCM Information Hub) (https://schulich.instructure.com/courses/14325/pages/developing-a-linkedin-profile?module_item_id=649458)

Article Reflection.

Due Date: Tue Jun 23, 2026 at 11:59pm EDT

Article Reflections (5%); Due: Any time up to Session 8

Through the course of the semester, students will submit one 150-word reflection on a specific article from the reading list from sessions 1 through 8 (not including Teknosport or Leo Burnett). Please ensure you select ONE article only from the appropriate set of readings for each Article Reflection assignment.
The reflection must be structured as follows: No more than 50 words in each of three paragraphs (without subheadings) on:
(a) the key idea(s) of the article, that is, what the author wants you to know or takeaway from the article; (b) your personal reflective response to the key idea(s) from your life and/or experience; and
(c) how the key idea(s) integrate with your growing knowledge of Business Communication and Team Dynamics from the course overall.
Please remember to include the name of the article on which you are writing. Yes, the specified word count is strict. You are allowed no more than plus-or-minus 5 words leeway for any paragraph and no more than plus-or-minus 10 words overall.
The intention of this assignment is to practice the business communication skills of summarizing and integrating non-trivial information into a concise report according to specification.
Please note that the use of any Large Language Model AI system such as ChatGPT, Claude, Gemini, Grok, or any other is PROHIBITED and will result in you receiving a zero on the assignment, a review of all your other work in the course, and a referral to the Academic Integrity Committee for further sanction.

Teknosport Case - Presentation to the Board (10%); Group - PowerPoint Submission.

Due Date: Tue Jun 9, 2026 at 06:00pm EDT

Harri Karvinen and the Teknosport Board of Directors agrees to hear your case for retaining the Sales Training Program. Prepare a team presentation with visual aids to persuade the Board to accept your intentions for the STP. Your team must be strategic and persuasive in creating an argument that will tip the scales in favour of your recommendation, and integrates the team members' ideas. Your team has been given exactly 5 minutes on the Board's agenda. Use specific details from the case in support of your position that you may augment based on your own knowledge and experience of the efficacy of sales training programs. Remember that any claims or assertions must be

supported by documented fact (i.e. derived from the case); do not invent information or facts. You should draw on ideas from the persuasive frameworks discussed in Session 5. The deck will be uploaded for scoring. The presentation will be delivered live in class during Session 6. All team members are to speak as part of the presentation.
For all presentation decks throughout the course, please include a slide with the team members' current pictures and names as the second slide immediately after your title slide. Please remember to introduce your team members live while that slide is displayed.

The Impossible Case Team Challenge - Part 1: Presentation (PowerPoint Submission).

Due Date: Tue Jul 7, 2026 at 07:50pm EDT

Students will be assigned to teams and, using all the techniques, methods, frameworks, and theories learned throughout the semester, collaboratively create an approach to analyzing and collectively deciding on an “impossible” case, that is, one with no right answer. Part 1: Team Analysis and Presentation (15%); Group; During Class 10
Students will be randomly distributed into teams of approximately 5 members (depending on total enrolment). The intention is to create a team approach, analyzing a complex situation and collectively deciding on a course of action and recommended in a situation with no one right answer. During the approximately 80-minute collaboration time, the teams will create and subsequently deliver a presentation using visual aids to present their recommendation and reasoning. Presentations will be no fewer than 6 and no more than 8 minutes maximum with all members equally participating in the presentation; that is, speaking for equal time without notes.
Please upload your PowerPoint deck for scoring, ensuring that your team members' names and pictures are on either the title slide or second slide.

The Impossible Case Team Challenge - Part 2: Reflection.

Due Date: Tue Jul 14, 2026 at 11:59pm EDT

Students will be placed into ad-hoc teams and, using all the techniques, methods, frameworks, and theories learned throughout the semester, collaboratively create an approach to analyzing and collectively deciding on an “impossible” case, that is, one with no right answer.

Part 2: Personal Reflection; Individual (10%); Due: One week after the Challenge (i.e., Session 11)

Students will write a personal reflection on the team dynamics that occurred during The Impossible Case challenge. You will want to consider what worked, what didn’t work as well as it might have, and what learning from the class sessions were and were not useful to resolve challenges your team may have faced. The intention of this reflection paper is both to practice the skills of critical reflection and to serve as future guidance for creating effective teams. There are no specific minimum or maximum word limits; you should target roughly 800 words or so as a good length. Please remember to contextualize your

experience in terms of specific course constructs, frameworks, and theories (i.e., you have to both name the construct and show how it applied or should have applied if you didn't think of using it at the time).

Real Workplace Case Study - Part 1: Presentation (10%; PowerPoint Submission) .

Due Date: Tue Jul 14, 2026 at 06:00pm EDT

Part 1: Presentation (10%)

Applying the frameworks and methods discussed in class, augmented by research into current practices that address the specifics of the situation, students will create a formal presentation that describes the situation, reviews possible alternative communication and/or team dynamics interventions, and makes appropriate recommendations for strategic and tactical approaches. This is to be a 20-minute formal presentation with visual aids during which all team members will speak for equal time (without using notes or simply reading from slides). Once the presentations are posted, the rest of the class will be invited to offer responses that engage with the material and authentic acknowledgements for several of the other groups.
This submission is for the PowerPoint deck.

Real Workplace Case Study - Part 2: Briefing Summary (10%).

Due Date: Tue Jul 14, 2026 at 06:00pm EDT

Part 2: Briefing Summary (10%)

The Briefing Report complements the presentation with a briefing summary highlighting the key elements of the situation. This document would be the takeaway summary for members of an executive committee to whom you would be presenting. You MUST use the template provided (https://schulich.instructure.com/courses/14294/files/1721731?location=course_syllabus_14294&verifier=joFrTOlU6BXDWx2wicOifdmnBrjuPI4prhbLVGPe&wrap=1) (https://schulich.instructure.com/courses/14294/files/1721731/download?location=course_syllabus_14294&verifier=joFrTOlU6BXDWx2wicOifdmnBrjuPI4prhbLVGPe&download_frd=1) to cover the following aspects in bullet point form:

1. Minto structure items: Situation, Complication, Question, Recommendation/Answer (#ProTip: Make sure the Question you are working from is an analytic question. You may indicate both an analytic and a business question in your briefing.)
2. Intended effects or outcome resulting from the recommendation
3. Highlights/breakdown of the key complicating issues (i.e., Why do the complicating issues create a deviation from the baseline Situation? What is problematic about the Complication?)
4. Outline of the analysis logic used to arrive at the recommendation/answer (#ProTip: Follow the reasoning chain from Complication through to the desired effects that is used to derive the recommended intervention or change that will enable those desired effects.)

5. Outline of specifically how the Recommendation will create the intended outcome/effects.
6. Compose an Executive Summary based on the template example provided.

The Briefing Summary is restricted to the 2 pages of the template. I will not read beyond 2 pages. After you upload your assignment, you may want to verify that it downloads and opens as 2 pages only.

Real Workplace Case Study - Part 3: Process Reflection (10%).

Due Date: Tue Jul 21, 2026 at 11:59pm EDT

Part 3: Process Reflection (10%)

The Process Reflection considers the team process of completing this project, reflecting on the challenges, responses, resolutions, and overall dynamics of the team collaboration. (It should go without saying that…) Specific references to the materials, frameworks, and ideas from the course are highly recommended (read: mandatory, because I will be assessing your submission largely on how well you can apply the course material to your actual experiences in the group). The reflection's target length is no more than 1000 words.
Note: This part of the assignment is NOT intended to paint a rosy picture of everything going perfectly well (because it never does). Nor will it be taken as throwing any member of your team "under the bus" so you can be specific with naming other team members. (Doing so will keep everyone honest in their reflections; no one will be penalized for admitting less-than-ideal behaviour.) Rather, it is to be an honest narrative of what and how you experienced the team dynamics while working together, what you or other team members attempted to resolve problems and encourage success, a reflection on the relative success of those efforts, and your personal learning for the future.

Presentation Style and Storytelling Discussion .

Due Date: Mon Jun 1, 2026 at 11:59pm EDT
What have you noticed about my presentation style?
What have you noticed about the design of my slides?
What contributes to great storytelling in presentations (aside from the AMORE structure and Minto Pyramid)?

Leo Burnett Case Presentation - PowerPoint Submission.

Due Date: Tue Jun 16, 2026 at 06:00pm EDT

*The Leo Burnett Case (*https://www.iveypublishing.ca/s/product/the-leo-burnett-company-ltd-virtual-team-management/01t5c00000CwrApAAJ*) comprises in-group discussions and the just-in-time development of a formal recommendation presentation as if you were a consulting team. You will undertake the analysis and develop a recommendation presentation to be given during the class meeting. Please ensure that you submit the presentation BEFORE CLASS. Presentations will begin at 18:30 with the order selected by lottery. Target the presentation to be between 7 and 10 minutes with all team members speaking as is the norm for this course.*

Likewise, please ensure that you include a slide with the names and pictures of your team members, and introduce your team members, again, as is the norm for all presentations in this course.
Members of your group will likely possess multiple intelligences including those beyond verbal/linguistic and logical/mathematical. Your team would be wise to seek out the additional intelligences and put them to productive purpose during the thinking and development of your project. Also important to note: Performing your analysis and constructing your presentation according to the Minto Pyramid method and framework is strongly advised! One more thing: Your team members may want to consider and act on the guidance each person received from the Teknosport presentation so that you can all build on those ideas to enhance the quality of this presentation. This would be a great opportunity to practice speaking without notes as all future presentation assignments will require no notes while speaking.
Learning Note: This collaborative case work involved in this assignment is intended for students to develop and exercise skills that will be required for Session 10's "Impossible Case Challenge" that is worth 25% of your final mark. The value of participating in this assignment is not so much the few participation points for Leo Burnett, but rather the invaluable real-world skill and technique of coordinating a team with a challenging assignment under a strict time limitation.

The questions to be answered in the group's presentation:

1. Discuss whether the Canadian team should be given autonomy or should control be maintained centrally in London?

2a. If control remains centralized, how will team dynamics be improved? OR...
2b. If control is decentralized (i.e. local autonomy in Canada) how should the brand team be led and managed given key personnel resignations?
3. What is most important in terms of knowledge for brand success, and where does/should it reside?

Remember: The Minto Pyramid is your friend!

Leo Burnett Case Briefing Summary - Document Submission.

Due Date: Tue Jun 16, 2026 at 06:00pm EDT

Part 2: Briefing Summary

The Briefing Report complements the presentation with a briefing summary highlighting the key elements of the situation. This document would be the takeaway summary for members of an executive committee to whom you would be presenting. You MUST use the template provided (https://schulich.instructure.com/courses/14294/files/1721731?location=course_syllabus_14294&verifier=joFrTOlU6BXDWx2wicOifdmnBrjuPI4prhbLVGPe&wrap=1) (https://schulich.instructure.com/courses/14294/files/1721731/download?location=course_syllabus_14294&verifier=joFrTOlU6BXDWx2wicOifdmnBrjuPI4prhbLVGPe&download_frd=1) to cover the following aspects in bullet point form:

1. Minto structure items: Situation, Complication, Question, Recommendation/Answer (#ProTip: Make sure the Question you are working from is an analytic question. You may indicate both an analytic and a business question in your briefing.)
2. Intended effects or outcome resulting from the recommendation
3. Highlights/breakdown of the key complicating issues (i.e., Why do the complicating issues create a deviation from the baseline Situation? What is problematic about the Complication?)
4. Outline of the analysis logic used to arrive at the recommendation/answer (#ProTip: Follow the reasoning chain from Complication through to the desired effects that is used to derive the recommended intervention or change that will enable those desired effects.)
5. Outline of specifically how the Recommendation will create the intended outcome/effects.
6. Compose an Executive Summary as outlined in the template

Note that none of these sections should be written as a repeat of a prior section.
The Briefing Summary is restricted to the 2 pages of the template. I will not read beyond 2 pages. After you upload your assignment, you may want to verify that it downloads and opens as 2 pages only.

Live Coaching Practice.

Due Date: Tue Jun 9, 2026 at 06:30pm EDT

Live coaching practice in small groups for the Request-Promise dialogue and Coaching for All Occasions.
Learning Note: These scripts will be very useful during both the Impossible Case Challenge and your group work for the Real Workplace Case Study. Having an opportunity to practice them in a controlled, safe, low-stakes environment will enable you to use them when the stakes are higher.

Bohm Dialogue Practice.

Due Date: Tue Jun 30, 2026 at 11:59pm EDT

In-Class: Bohm Dialogue Exercise
Preparation before class: Students should do the following:
1. Review the videos on the content page (https://schulich.instructure.com/courses/14294/pages/week-8-content-how-teams-learn) for this week.
2. Listen to the example Dialogue on Facebook (linked on the Week 9 Module).
3. Select one of the Bohm Dialogue Polarities
   (https://schulich.instructure.com/courses/14294/files/1665775?location=course_syllabus_14294&verifier=yf4ZkRIDVjtG1MQBpZ8JaJ3vngXbMr7pr5rsm43c&wrap=1)
   (https://schulich.instructure.com/courses/14294/files/1665775/download?location=course_syllabus_14294&verifi

er=yf4ZkRIDVjtG1MQBpZ8JaJ3vngXbMr7pr5rsm43c&download_frd=1) and choose which side they want to advocate for.

4. Sign up for the Group associated with the Polarity and the side.
5. Connect with your group to coordinate, strategize, and prepare the case for your side.

Learning Note: Once again, this session is intended to develop key intra-group communication skills necessary when dealing with controversy and conflicting opinions within a group. These skills will be very useful during the Impossible Case Challenge and Real Workplace Case Study group work.

RWCS Groups Acknowledgements.

Due Date: Tue Jul 21, 2026 at 11:59pm EDT

After the RWCS presentations, please post a response for each of two groups that engages with the material and authentically acknowledges a groups other than your own. We are looking for what you loved about the presentation, what strengths you observed in the analysis and presentation itself, how the group professionally showed up, and so forth. For full credit, you must post two acknowledgements after the presentations.
Please ensure that you specifically identify the presentation on which you are commenting at the beginning of your response.

Schulich
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CLASS-BY-CLASS SYLLABUS

Introductions - Welcome!

May 5/26 Overview: Introduction

Introduction

Topics

About the Course (https://schulich.instructure.com/courses/14294/pages/about-the-course)

Required Readings, Videos, etc.

Provided on Canvas

Questions?

If you have general course questions, please Post it as a Reply on this Discussion thread: Course Questions - Ask Me Anything!
(https://schulich.instructure.com/courses/14294/discussion_topics/154504)

Session Discussions and Contributions

Throughout the semester, there will be discussion questions in various modules, and larger activities that are not major assignments. The intention for these activities is to provide the student low-stakes practice and skill-building in preparation for the skills required to be successful in the major assignments. These activities include the Leo Burnett Case (in Week 7), the Live Peer-Coaching (also in Week 7), and the Bohm Dialogue (in Week 9). To recognize the value of participating in module discussions and the larger activities, a smaller number of points will be awarded for responses and contributions.

Week 1 - Building Career Awareness

Overview of Course Module (Weeks 1 - 3)

Course Module: Professional Communication and Career Development in Supply Chain
Weeks 1 - 3 | MSTM 5000 Business Communications and Team Dynamics

Description:

Welcome to MSTM 5000! Mark Federman is the primary instructor of this course and will be your guide throughout the semester. However, weeks 1 to 3 of this course will consist of a course module, delivered by co-instructor, Anthony Ferreira, with a focus on professional communication and career development in supply chain management.

May 5/26

The ability to communicate who you are as a professional, clearly and strategically, is a foundational career competency. The first three weeks of this course guide students through a structured process of self-reflection and planning, with a focus on how they present themselves as supply chain professionals. Through applied exercises and industry engagement, students will refine the core communication tools needed to engage effectively in a professional context (résumé, LinkedIn profile, and positioning statement), develop a strategic career plan (Career Development Roadmap), and build momentum toward their next career steps.

Week 1 - Building Career Awareness | Tuesday, May 5, 2026
During this session, students will expand their strategic awareness of supply chain career options and employer expectations, and begin a preliminary self-assessment of interests, strengths, and development gaps.

Week 2 - Developing a Career Strategy | Tuesday, May 12, 2026
This session moves from awareness to strategy. Students will refine their career goals and translate their insights into a focused plan. They will also work to develop core professional communication tools including a professional résumé, LinkedIn presence, and a positioning statement (elevator pitch). The session concludes with a fireside chat with a senior industry leader who will share perspectives on building a successful career in supply chain.

Week 3 - Building Momentum | Tuesday, May 19, 2026
The final session in this module moves students from awareness and strategy to the final step of taking action. Through self-reflection and small group discussions, students will work to identify concrete next steps and take small, practical actions toward pursuing their chosen career direction. The session concludes with an alumni panel offering practical insights on job search strategy and career advancement. To close out this module, students will be required to submit their finalized résumé and completed Career Development Roadmap document.

Topics

Week 1: Building Awareness (https://schulich.instructure.com/courses/14294/pages/week-1-building-awareness)
Week 2: Developing a Career Strategy (https://schulich.instructure.com/courses/14294/pages/week-2-developing-a-career-strategy)
Week 3: Building Momentum (https://schulich.instructure.com/courses/14294/pages/week-3-building-momentum)

Required / Optional Readings, Videos, etc.

Review the topic pages above for required readings and resources

Assignments in this Course Module:

(https://schulich.instructure.com/courses/14294/assignments/137722)
(https://schulich.instructure.com/courses/14294/assignments/137720) Graded Reflection: Supply Chain Simulation (https://schulich.instructure.com/courses/14294/assignments/137719)

(https://schulich.instructure.com/courses/14294/assignments/137719) Assignment: Résumé & LinkedIn Profile (https://schulich.instructure.com/courses/14294/assignments/137722)
Graded Reflection: Industry Guest Speaker (https://schulich.instructure.com/courses/14294/assignments/137720)
Graded Reflection: Positioning Statement (Elevator Pitch) (https://schulich.instructure.com/courses/14294/assignments/137721)
(https://schulich.instructure.com/courses/14294/assignments/137723) Assignment: Career Development Roadmap (https://schulich.instructure.com/courses/14294/assignments/137741)
Assignment: Final Résumé (https://schulich.instructure.com/courses/14294/assignments/137723)

Overview 1: Building Career Awareness

Week 1 - Building Career Awareness | Tuesday, May 5, 2026
During this session, students will expand their strategic awareness of supply chain career options and employer expectations, and begin a preliminary self-assessment of interests, strengths, and development gaps.
Note: For Week 1, please download the Career Development Roadmap (https://schulich.instructure.com/courses/14294/files/1693028?location=course_syllabus_14294&verifier=xejzYWwqFSWONS4pBAHLshM5FX3Jpd9xvZqcwK8y&wrap=1) (https://schulich.instructure.com/courses/14294/files/1693028/download?location=course_syllabus_14294&verifier=xejzYWwqFSWONS4pBAHLshM5FX3Jpd9xvZqcwK8y&download_frd=1) workbook and have it open and ready to use in class. This workbook is to be completed incrementally as you move through the module and class time will be devoted to completing many of the exercises. Work through each section as the module progresses and upload the completed document to Canvas at the end of Week 3.

Required Readings, Videos, etc.

Schulich School of Business (2025). Careers in Supply Chain: A Practical Guide (Part 1, pp. 1-27, 31).
(https://schulich.instructure.com/courses/14294/files/1683093?location=course_syllabus_14294&verifier=UHRCHPPEV7SoGFTzcV6XDhtPucopABiqAtEqPVcl&wrap=1)
(https://schulich.instructure.com/courses/14294/files/1683093/download?location=course_syllabus_14294&verifier=UHRCHPPEV7SoGFTzcV6XDhtPucopABiqAtEqPVcl&download_frd=1)

Optional Readings

Hines, R., and Beck, S. (2017). Ultimate Career Guide. Schulich School of Business Career Development Centre, York University. (https://issuu.com/schulichschool/docs/schulich-cdc-careerguide-web) (https://issuu.com/schulichschool/docs/schulich-cdc-careerguide-web) (Recommended chapters: 1 - Gathering Tools, 2 - Getting to Know Yourself, 3 - Resumes; 5 - LinkedIn.)
Global Affairs Canada, Office of the Chief Economist. "Part 2: Supply Chains." In Canada's State of Trade 2024: Supply Chains. Ottawa: Government of Canada, June 2024. https://international.canada.ca/en/global-affairs/corporate/reports/chief-economist/state-trade/2024#a4 (https://international.canada.ca/en/global-affairs/corporate/reports/chief-economist/state-trade/2024#a4) .
Fink, Ross L. "Supply Chain Failure: KFC's Chicken Shortage." OM in the News. McGraw-Hill Education, March 19, 2018. https://ominthenews.com/supply-chain-failure-kfcs-chicken-shortage/ (https://ominthenews.com/supply-chain-failure-kfcs-chicken-shortage/) .

Friedrich, Otto. "The Strange Cabbage Patch Craze." Time, December 12, 1983. https://time.com/archive/6855285/the-strange-cabbage-patch-craze/ (https://time.com/archive/6855285/the-strange-cabbage-patch-craze/) .
WPVI-TV. "The Strange Story of the Cabbage Patch Kid Riots of 1983." 6abc Philadelphia, November 18, 2022. https://6abc.com/post/cabbage-patch-dolls-crazy-riot-the-vault/5713681/ (https://6abc.com/post/cabbage-patch-dolls-crazy-riot-the-vault/5713681/)

Resources

Schulich Résumé Template
(https://schulich.instructure.com/courses/14294/files/1683053?location=course_syllabus_14294&verifier=vA7h96qbkFzYJyCiGt2qk057td0jV0Oj6V66izfV&wrap=1)
(https://schulich.instructure.com/courses/14294/files/1683053/download?location=course_syllabus_14294&verifier=vA7h96qbkFzYJyCiGt2qk057td0jV0Oj6V66izfV&download_frd=1)
CCD Résumé Guidelines
(https://schulich.instructure.com/courses/14294/files/1683054?location=course_syllabus_14294&verifier=WKdF1ZuQEzg52M7jdpciDHLBV4yCo9po5OMyhxBy&wrap=1)
(https://schulich.instructure.com/courses/14294/files/1683054/download?location=course_syllabus_14294&verifier=WKdF1ZuQEzg52M7jdpciDHLBV4yCo9po5OMyhxBy&download_frd=1)
Developing a Résumé. MSCM Information Hub. Canvas Resource
(https://schulich.instructure.com/courses/14325/pages/developing-a-resume?module_item_id=649456)
MSCM Résumé Tips. MSCM Information Hub, Canvas Resource
(https://schulich.instructure.com/courses/14325/pages/developing-a-resume-resume-tips?module_item_id=649457)
LinkedIn Tips. MSCM Information Hub
(https://schulich.instructure.com/courses/14325/pages/developing-a-linkedin-profile?module_item_id=649458) ,
Canvas Resource (https://schulich.instructure.com/courses/14325/pages/developing-a-resume-resume-tips?module_item_id=649457)

Assigned Work Due

Graded Reflection: Supply Chain Simulation
(https://schulich.instructure.com/courses/14294/discussion_topics/155619) Due: 6 May 2026 @ 23:59
Assignment: Résumé & LinkedIn Profile Due: 11 May 2026 @ 23:59
(https://schulich.instructure.com/courses/14294/assignments/137722)

Week 2 - Developing a Career Strategy

May 12/26 Overview 2: Developing a Career Strategy

Week 2 - Developing a Career Strategy | Tuesday, May 12, 2026

This session moves from awareness to strategy. Students will refine their career goals and translate their insights into a focused plan. They will also work to develop core professional communication tools including a professional résumé, LinkedIn presence, and a positioning statement (elevator pitch). The session concludes with a fireside chat with a senior industry leader who will share perspectives on building a successful career in supply chain.

Required Readings, Videos, etc.

Schulich School of Business (2025). Careers in Supply Chain: A Practical Guide (Part 2, pp. 28-40).
(https://schulich.instructure.com/courses/14294/files/1683093?location=course_syllabus_14294&verifier=UHRCHPPEV7SoGFTzcV6XDhtPucopABiqAtEqPVcl&wrap=1)
(https://schulich.instructure.com/courses/14294/files/1683093/download?location=course_syllabus_14294&verifier=UHRCHPPEV7SoGFTzcV6XDhtPucopABiqAtEqPVcl&download_frd=1)
Guest speaker preparation: research the announced industry guest and come prepared with questions.

Optional Readings

Hines, R., and Beck, S. (2017). Ultimate Career Guide. Schulich School of Business Career Development Centre, York University. (https://issuu.com/schulichschool/docs/schulich-cdc-careerguide-web) (Recommended chapters: 1 - Gathering Tools, 2 - Getting to Know Yourself; 3 - Resumes; 5 - LinkedIn.)

Assigned Work Due

Graded Reflection: Industry Guest Speaker
(https://schulich.instructure.com/courses/14294/assignments/137720) Due: 18 May 2026 @ 23:59
Graded Reflection: (https://schulich.instructure.com/courses/14294/assignments/137721) Positioning Statement (Elevator Pitch) (https://schulich.instructure.com/courses/14294/assignments/137721) Due: 18 May 2026 @ 23:59 (https://schulich.instructure.com/courses/14294/assignments/137721)

Week 3 - Building Momentum

May 19/26 Overview 3: Building Momentum

Week 3 - Building Momentum | Tuesday, May 19, 2026
The final session in this module moves students from awareness and strategy to the final step of taking action. Through self-reflection and small group discussions, students will work to identify concrete next steps and take small, practical actions toward pursuing their chosen career direction. The session concludes with an alumni panel offering practical insights on job search strategy and career advancement.
Required Readings, Videos, etc. Guest speaker preparation: Research the announced alumni panelists and come prepared with questions.

Optional Readings

Hines, R., and Beck, S. (2017). Ultimate Career Guide. Schulich School of Business Career Development Centre, York University. (https://issuu.com/schulichschool/docs/schulich-cdc-careerguide-web) (Recommended chapters: 4 - Marketing Yourself, 6 - Art of the Interview)

Assigned Work Due

Assignment: (https://schulich.instructure.com/courses/14294/assignments/137741) Career Development Roadmap (https://schulich.instructure.com/courses/14294/assignments/137741) Due: 25 May 2026 @ 23:59

Assignment: (https://schulich.instructure.com/courses/14294/assignments/137723) Final Résumé (https://schulich.instructure.com/courses/14294/assignments/137723) Due: 25 May 2026 @ 23:59 (https://schulich.instructure.com/courses/14294/assignments/137723)

Week 4 - Telling Great Stories: The basics of business communication

May 26/26 Overview 4: Telling Great Stories: The basics of business communication

Class 4

Topics

Telling Great Stories: The basics of business communication (https://schulich.instructure.com/courses/14294/pages/week-1-content-telling-great-stories)

Required Readings, Videos, etc.

Carriger (2010). Narrative vs PowerPoint: for leaders, it may not be a matter of fact. (Links to an external site.) (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/10878572/v38i0002/52_nvpflinbamof.xml)
Minto (1998). Think your way to clear writing, part 1 (Links to an external site.) (https://ezproxy.library.yorku.ca/login?url=https://www.proquest.com/scholarly-journals/think-your-way-clear-writing/docview/215895692/se-2?accountid=15182) .
Minto (1998b). Think your way to clear writing, part 2 (Links to an external site.) (https://www.proquest.com/docview/215898879/6915A4DFC6184CCCPQ/1?accountid=15182) .

Optional Readings

Denning (2006). Effective storytelling: strategic business narrative techniques (Links to an external site.) (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/10878572/v34i0001/42_essbnt.xml) .
Forman (2007). Leaders as storytellers: Finding Waldo (Links to an external site.) (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/10805699/v70i0003/369_lasfw.xml) .
Goentzel (2011). Getting Your Point Across Without Bullets and Builds (Links to an external site.) (https://ezproxy.library.yorku.ca/login?url=https://www.proquest.com/trade-journals/getting-your-point-across-without-bullets-builds/docview/903303384/se-2?accountid=15182) .
Knight, Paroutis, & Heracleous (2018). The power of PowerPoint: A visual perspective on meaning making in strategy (Links to an external site.) (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/01432095/v39i0003/894_tpopavpommis.xml) .

Assigned Work Due

Scored Discussion: Presentation Style and Storytelling Discussion (https://schulich.instructure.com/courses/14294/discussion_topics/154503) Due: 1 June 2026 @ 23:59

Week 5 - Persuasive Stories and Team Stories: Persuasion and the Life Cycle of a Team

Jun 2/26

Overview 5:Telling Persuasive Stories and Telling Team Stories

Class 5

Topics

Telling Persuasive Stories and the Life Cycle of a Team (https://schulich.instructure.com/courses/14294/pages/week-2-content-telling-persuasive-stories-theories-methods-and-practices-of-persuasion)

Assigned Readings, Videos, etc.

(http://resolver.scholarsportal.info.ezproxy.library.yorku.ca/resolve/07475632/v23i0002/999_phbebshipopr.xml)
Videos Provided on Canvas
Guadagno & Cialdini (2007). Persuade him by email, but see her in person: Online persuasion revisited (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/07475632/v23i0002/999_phbebshipopr.xml) .
Edmondson (1999). Psychological Safety and Learning Behavior in Work Teams (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/00018392/v44i0002/350_psalbiwt.xml) .
Tuckman (1965). Development sequence in small groups (https://ezproxy.library.yorku.ca/login?url=https://www.proquest.com/scholarly-journals/developmental-sequence-small-groups/docview/205826761/se-2?accountid=15182) .

Required Reading for the assignment due next week:

Rodgers (1998). Teknosport: Communicating to prevent change. (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/10805699/v61i0001/139_tctpc.xml)

Optional Reading

Cialdini & Goldstein (2010). (http://resolver.scholarsportal.info.ezproxy.library.yorku.ca/resolve/00664308/v55inone/591_sicac.xml) Social influence: compliance and conformity (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/00664308/v55inone/591_sicac.xml) . [This is a good overall reference and summary of models and techniques]
Malhotra & Bazerman (2008). Psychological influence in negotiation: An introduction long overdue. (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/01492063/v34i0003/509_piinailo.xml)

Week 6 - When Teams Work Well

Jun 9/26 Overview 6: When Teams Work Well: The Appreciative Mindset and Multiple Intelligences

Class 6

Topic

The Appreciative Mindset and Multiple Intelligences (https://schulich.instructure.com/courses/14294/pages/week-4-content-when-teams-work-well-1-the-appreciative-mindset)

Required Readings, Videos, etc.

Pre-class videos to be covered prior to class on the content page
Cooperrider & McQuaid (2012). The positive arc of systemic strengths. (https://link.gale.com/apps/doc/A375185304/AONE?u=yorku_main&sid=bookmark-AONE&xid=de99e604)
Gardner (2006). Beyond the IQ (https://www-taylorfrancis-com.ezproxy.library.yorku.ca/chapters/edit/10.4324/9780203019689-10/beyond-iq-howard-gardner) . (Online: Corresponds to pp. 47-53 in the physical book, The Development and Education of the Mind.)
Green, Hill, Friday, & Friday (2005). The use of multiple intelligences to enhance team productivity. (https://journals-scholarsportal-info.ezproxy.library.yorku.ca/details/00251747/v43i0003/349_tuomitetp.xml) (https://link.gale.com/apps/doc/A375185304/AONE?u=yorku_main&sid=bookmark-AONE&xid=de99e604)

Required Reading for the assignment

Rodgers (1998). Teknosport: Communicating to prevent change. (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/10805699/v61i0001/139_tctpc.xml)

Assigned Work Due

Major Assignment: Teknosport Case - Presentation to the Board (10%); Group (https://schulich.instructure.com/courses/14294/assignments/136902) Due: 9 June 2026 @ 18:00 (To be presented in class)

Week 7 - When Teams Work Less Well, part 1

Jun 16/26 Overview 7: When Teams Work Less Well, 1: Appreciative Management Techniques

Class 7

Topic

When Teams Work Less Well, 1: Appreciative Management Techniques (https://schulich.instructure.com/courses/14294/pages/week-6-content-when-teams-work-less-well-1-appreciative-management-techniques)

Required Readings, Videos, etc.

Pre-class videos to be covered prior to class on the content page
Aguinis, Gottfredson, & Joo (2012). Delivering effective performance feedback: The strengths-based approach (Links to an external site.) (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/00076813/v55i0002/105_depftsa.xml) .
James (2015). The Rightful Demise of the Sh*t Sandwich: Providing Effective Feedback (https://resolver-scholarsportal-info.ezproxy.library.yorku.ca/resolve/13524658/v43i0006/759_trdotsspef.xml) .

Required Reading for the Case

The Leo Burnett Company Ltd.: Virtual Team Management (https://www.iveypublishing.ca/s/product/the-leo-burnett-company-ltd-virtual-team-management/01t5c00000CwrApAAJ) (purchased from IveyCases.com - $9.71)

Assigned Work Due

Major Activity: Leo Burnett Case Presentation (https://schulich.instructure.com/courses/14294/assignments/136896) The class will have been divided into groups to present during the class meeting. (https://schulich.instructure.com/courses/12978/assignments/123404) Due: June 16, 2026 @ 18:00 (https://schulich.instructure.com/courses/14294/quizzes/17685)
Major Activity: (https://schulich.instructure.com/courses/14294/assignments/138090) Leo Burnett Briefing Summary (https://schulich.instructure.com/courses/14294/assignments/138090) Briefing document to accompany the presentation (https://schulich.instructure.com/courses/12978/assignments/123404) Due: June 16, 2026 @18:00
Major Activity: Live Coaching Practice (https://schulich.instructure.com/courses/14294/assignments/136897) (See above) Live coaching practice in small ad hoc groups for the Request-Promise dialogue and Coaching for All Occasions. Learning Note: These scripts will be very useful during both the Impossible Case Challenge and your group work for the Real Workplace Case Study. Having an opportunity to practice them in a controlled, safe, low-stakes environment will enable you to use them when the stakes are higher. Due: In-class activity, June 16, 2026
Minor Activity: Mid-term Check-in (https://schulich.instructure.com/courses/14294/quizzes/17685) Due: June 15, 2026 @ 23:59

Week 8 - When Teams Work Less Well, part 2

Jun 23/26 Overview 8: When Teams Work Less Well, 2: The 5 Dysfunctions of a Team

Class 8

Topic

When Teams Work Less Well, 2: The 5 Dysfunctions of a Team (https://schulich.instructure.com/courses/14294/pages/week-7-content-when-teams-work-less-well-2-the-5-dysfunctions-of-a-team)

Required Readings, Videos, etc.

Note: The first two articles below are released through EBSCO that does not allow deep linking from course syllabi. Please go to https://library.yorku.ca/ (https://library.yorku.ca/) . In the search bar, enter the authors' names. The results page will have an accessible link to the online article
Brett, Behfar, & Kern (2006). Managing multicultural teams.
Eisenhardt, Kahwajy, & Bourgeois III (1997). How management teams can have a good fight.
von Glinow, Shapiro, & Brett (2004). Can we talk, and should we? Managing emotional conflict in multicultural teams (https://www-jstor-org.ezproxy.library.yorku.ca/stable/20159072) .

Readings for Week 9, (should you want to use them for the Article Reflection assignment)

Bohm, Factor, & Garrett (1991). Dialogue: A proposal (http://www.infed.org/archives/e-texts/bohm_dialogue.htm) .

Druskat & Wolff (2001). Building the emotional intelligence of groups. (Follow the EBSCO instructions above)

Assigned Work Due

Major Assignment: Article Reflection (https://schulich.instructure.com/courses/14294/assignments/136894)
Due: June 23, 2026 @ 23:59 Select your Dialogue Polarity Group for next week's Bohm Dialogue exercise Due: June 26, 2026 @ 23:59 [Note: This is the Friday evening immediately following this
class] NOTE: If you have not selected a group by Saturday, June 27, I will assign you to one. I reserve the right to reassign group members to balance numbers.

Week 9 - How Teams Learn

Jun 30/26 Overview 9: How Teams Learn

Class 9

Topic

How Teams Learn (https://schulich.instructure.com/courses/14294/pages/week-8-content-how-teams-learn)

Required Readings, Videos, etc.

Pre-class videos to be covered prior to class on the content page
Bohm, Factor, & Garrett (1991). Dialogue: A proposal (http://www.infed.org/archives/e-texts/bohm_dialogue.htm) .
Druskat & Wolff (2001). Building the emotional intelligence of groups. (This is an EBSCO-hosted article. Go to https://library.yorku.ca/ (https://library.yorku.ca/) and enter the authors in the search bar. Select the article from the results page)

Assigned Work Due

Major Activity: Bohm Dialogue Practice (https://schulich.instructure.com/courses/14294/assignments/136895) Due: In-class activity June 30, 2026 @ 18:30

Week 10 - How Teams Make Decisions

Jul 7/26 Overview 10: How Teams Make Decisions

Class 10

Topic

How Teams Make Decisions (https://schulich.instructure.com/courses/14294/pages/week-9-content-how-teams-make-decisions)

Required Readings, Videos, etc.

Materials provided at the start of class

Assigned Work Due

Major Assignment: The Impossible Case Challenge Students will have approximately 80 minutes to work on The Impossible Case Challenge case and presentation. Impossible Case Challenge Case: Assignment Details (https://schulich.instructure.com/courses/14294/pages/impossible-case-challenge-case-assignment-details)
The case will be released in this module and groups named at 18:27 on July 7, 2026. The Impossible Case Team Challenge - Part 1: Presentation (https://schulich.instructure.com/courses/14294/assignments/136903)
The presentation must be uploaded prior to presentations beginning at 19:50 on July 7, 2026. If your presentation is not uploaded by the cut-off time, your team will be disqualified and receive a score of 0 for this assignment.
Learning note: The cut-off time disqualification requirement emulates the real-world circumstances of RFP submissions, among other situations.
(https://schulich.instructure.com/courses/14294/assignments/136903)

Week 11 - Real Workplace Case Study Presentations

Jul 14/26 Overview 11: RWCS Presentations

Class 11

Topic

RWCS Presentations (https://schulich.instructure.com/courses/14294/pages/week-10-content-rwcs-presentations)

Required Readings, Videos, etc.

None

Assigned Work Due

Major Assignment: Real Workplace Case Study - Part 1: Presentation (10%) (https://schulich.instructure.com/courses/14294/assignments/136898)
Due: July 14, 2026 @ 18:30
Major Assignment: Real Workplace Case Study - Part 2: Briefing Report (10%) (https://schulich.instructure.com/courses/14294/assignments/136899)
Due: July 14, 2026 @ 18:30
Major Assignment: The Impossible Case Team Challenge - Part 2: Reflection (10%) (https://schulich.instructure.com/courses/14294/assignments/136904)
Due: July 14, 2026 @ 23:59
Major Assignment (Future): Real Workplace Case Study - Part 3: Process Reflection (10%)

(https://schulich.instructure.com/courses/14294/assignments/136900)
Due: July 21, 2026 @ 23:59
Minor Assignment (Future): RWCS Groups Acknowledgements
(https://schulich.instructure.com/courses/14294/discussion_topics/154499)
Due: July 21, 2026 @ 23:59

Week 12 - Course Wrap-up and a Gift

Jul 21/26

Overview 12: Course Wrap-up and a Gift

Class 12

Topic

Course Wrap-up and The Takeaways (https://schulich.instructure.com/courses/14294/pages/week-12-content-course-wrap-up-the-takeaways)

Required Readings, Videos, etc.

Videos Provided on Canvas

Assigned Work Due

Scored Discussion: RWCS Groups Acknowledgements
(https://schulich.instructure.com/courses/14294/assignments/136887)
Due: July 21, 2026 @ 23:59
Course Evaluations Link:
ONCE: http://courseevaluations.yorku.ca/ (http://courseevaluations.yorku.ca/)
Due: In-class or TBD (No availability thereafter)

Schulich
School of Business
York University

STUDENT PREPARATION FOR CLASS AND CLASS PARTICIPATION: EXPECTATIONS

GENERAL SCHULICH ACADEMIC POLICIES

Grading

Grades at Schulich are based on a 9-point scale. 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 instructor's discretion.
For more details on the index, grading policy, and grade point average (GPA) requirements, consult your student handbook.

Academic Conduct

Academic conduct is fundamental to the integrity of university education and degree programs, and applies in every course offered at Schulich. Students are responsible for familiarizing themselves with and abiding by the York University Policy on Academic Conduct (https://www.yorku.ca/secretariat/policies/policies/academic-conduct-policy-and-procedures/)

Artificial Intelligence

According to York's Academic Conduct Policy, students are expected to follow all course and assignment instructions about the use of AI tools. Using AI tools without proper citation, acknowledgement, or documentation, or using them when they are not permitted for an assessment, may be considered a breach of academic conduct.
Students may find additional details about AI and assessment instructions in other sections of the syllabus and are expected to ask the instructor for guidance (and to follow that guidance) when unsure about whether specific uses of AI are permitted.
For more general support in understanding your use of AI as it relates to academic conduct, please visit: AI Technology & Academic Integrity - Academic Integrity (https://www.yorku.ca/unit/vpacad/academic-integrity/ai-technology-academic-integrity/)

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 Academic Accommodations & Supports for Students - Schulich School of Business (https://schulich.yorku.ca/current-students/academic-advising-supports-for-students/) .

Exams (Absence from)

Midterm

Students who miss a midterm examination must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. 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 online within 48 hours. 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 Deferred Standing Request (Make-Up Exam) (https://ssbforms.apps01.yorku.ca/machform/view.php?id=151156) . Student & Enrolment Services will notify the instructor and copy the student by email if appropriate documentation has been received.

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 York University's Code of Student Rights and Responsibilities (https://students.yorku.ca/oscr/the-code) . 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. For details on how to handle a breach of community standards, visit the Office of Student Community Relations (https://students.yorku.ca/oscr) . 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.
*** Please note that academic policies specific to this course may be contained in other parts of this course outline.*

These course materials are designed for use as part of this course at York University and are the property of the instructor unless otherwise stated. Third party copyrighted materials (such as book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law.
Copying this material for distribution (e.g. uploading material to a commercial third-party website) may lead to a violation of Copyright law.

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Murat Kristal, Program Director, Master of Business Administration in Technology Leadership
Date: October 14, 2026
Re: Motion to Establish Credit Transfer Policy for the Tech MBA

Motion:

1. That Faculty Council approve a credit transfer policy permitting students admitted through approved partner institutions to receive transfer credit toward the Tech MBA for coursework completed at the partner institution, for up to 50% of the total degree requirements, provided such credit is usually limited to courses equivalent to those offered in Terms 1 and 2 of the program. Students will normally complete Terms 3 and 4 at the Schulich School of Business, subject to program and Faculty regulations. Any proposed deviation from this structure, particularly where coursework associated with Terms 3 and 4 may be completed outside Schulich, shall require explicit review and approval by the Program Director (or designate).
2. That Faculty Council approve advanced standing to the Tech MBA program for Schulich BBA graduates for the following courses: ACTG 5100, FINE 5200, MKTG 5200, and SGMT 5200. And that the admission transfer credit policy for the MBA can be applied to the shared core courses in Tech MBA.

Rationale:

1. Tech MBA is exploring partnerships with external institutions that may offer coursework aligned with portions of the program curriculum. Establishing a transfer credit policy that permits recognition of prior learning for up to 50% of degree requirements provides the flexibility to develop and maintain partnerships with a range of institutions whose curricula may vary modestly in structure and content.

   A transfer credit limit of up to 50% aligns with common graduate-level practices and allows the program to recognize equivalent academic achievement while maintaining oversight of degree quality and learning outcomes. The policy also enables efficient implementation of partnership agreements without requiring governance approval for minor curricular variations among partner institutions.

   The Tech MBA derives much of its distinctive character, integrative learning experience, and

value proposition from the curriculum delivered in Terms 3 and 4 at Schulich. Accordingly, the program's default structure will remain that students complete Terms 1 and 2 at an approved partner institution and Terms 3 and 4 at Schulich. This principle ensures that students experience the advanced Tech MBA curriculum, cohort learning environment, and Schulich-specific program elements that differentiate the degree.

While the proposed language permits transfer credit for up to 50% of degree requirements, it is not intended to create a routine pathway for students to complete a substantial portion of the latter stages of the program outside Schulich. Any exception to the expected structure of completing Terms 3 and 4 at Schulich would be subject to program director review and approval to ensure alignment with program objectives and academic standards.

The proposed policy supports strategic partnership development, facilitates student mobility, and expands access to the Tech MBA while safeguarding academic quality. It provides sufficient flexibility to accommodate partner schools with differing curricular designs while maintaining the integrity and distinctiveness of the Schulich Tech MBA experience.

2. This motion ensures consistent and equitable application of credit transfer/advanced standing rules for Schulich BBA graduates and well qualified incoming students from comparator BBA and BCom programs into the Tech MBA, given that the school already applies credit transfer for the same courses to students entering the MBA.

Schulich School of Business Memorandum

To: Faculty Council, Schulich School of Business
From: Matthias Kipping, Associate Dean EMBA
Date: October 20, 2026
Re: **New courses**: EMBA 6032: Cybersecurity & Privacy Governance; EMBA 6033: Luxury Strategy; EMBA 6034: AI Foundations for Executives; EMBA 6036 Governing for Generational Growth
Course name change: EMBA 6755: Leading & Managing Diverse Organizations

Motion:
Requesting approval for four new elective courses and one course name change in the Kellogg Global Network.

Rationale:
Kellogg-Schulich EMBA students are required to participate in global electives to meet graduation requirements. These four new courses are being offered to students in the Kellogg Global network including those who are enrolled in the Kellogg-Schulich global electives. All our partner schools are periodically reviewing their electives offerings in response to student demand and to keep up to date. Course name changes occur to better reflect the content of the course offering.

EMBA 6032 2.0 Cybersecurity & Privacy Governance

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

2. **Course Number:** EMBA 6032

3. **Credit Value:** 2.0

4. **Long Course Title:** Beyond Compliance: Leading Cybersecurity & Privacy Governance Across Enterprise

5. **Short Course Title:** Cybersecurity & Privacy Governance

6. **Effective Session:** Winter 2027

7. **Calendar (Short) Course Description:**
This course uses real world cases, applied frameworks, and the Governance-by-Design methodology to equip participants with an understanding of cybersecurity and privacy as strategic, enterprise-wide responsibilities and to collaborate with the relevant executives and teams to build resilient, accountable, and data driven enterprises that inspire trust among employees, customers, and suppliers.

8. **Expanded Course Description:**
Through real world cases, applied frameworks, and the Governance-by-Design methodology, participants learn how to assess risks holistically, embed cybersecurity and privacy governance into the culture and decision-making structures of their organizations, and can apply actionable leadership practices immediately. The course examines how Chief Information Security Officers (CISOs), Chief Privacy Officers (CPOs), cross functional teams, and security and privacy champions collaborate to build resilient, accountable, and data driven enterprises. By the end of the course, executives will be prepared to introduce and lead cybersecurity and privacy as strategic, enterprise-wide responsibilities and to steward complex, data intensive organizations in a global regulatory environment.

9. **Course Learning Outcomes:**
Upon completion of the course, students will be able to:
   - Translate complex cyber and privacy risks into strategic business decisions that support organizational priorities.
   - Evaluate how cybersecurity and privacy create competitive advantage and trust through strong governance, ethical data practices, and proactive leadership.
   - Apply the Governance by Design methodology to assess or redesign processes, decisions, or initiatives related to cybersecurity and privacy.

10. **Rationale:**
In an era of geopolitical instability, AI-accelerated threats, and intensifying national and global regulatory pressure, cybersecurity and privacy governance have become enterprise-wide leadership responsibilities—not technical functions. This means that executives can no longer simply delegate these tasks to the specialists and treat compliance as a checklist. Instead, they need to understand the trade-offs involved when it comes to strengthening the resilience of their organization, guide the required developments from a

strategic vantage point, and communicate the relevant policies and actions both internally and externally. Since most of our students aspire to leadership positions in their organizations, a solid understanding of these risks and how to address them, should become an integral part of their skillset.

11. Evaluation:

Assignments for this course include, at the individual level, class participation based on informed, meaningful, and innovative contributions (20%) as well as two short videos – each worth 20% of the final grade: one covering their pre-class "mental models", and the other demonstrating their changed understanding after completing the course. The remaining 40% will be determined by a group-based presentation and the associated PowerPoint slides.

12. Integrated Courses:

NOT integrated

13. Crosslisted Courses:

NOT crosslisted

14. Faculty Resources:

This course is being offered by the Schulich School of Business as an **online** elective to all students from the Kellogg EMBA Global Network during the Winter term. It will be taught by Ghayda Nassar is a seasoned executive and recognized thought leader in cybersecurity, privacy law, and AI governance, with over 20 years of leadership experience across financial services, telecom, government, and technology sectors. She combines legal insight, technical fluency, and strategic foresight to help organizations navigate digital risk and transformation. She is also a professor of cybersecurity, teaching professionals and executives to translate complex topics into actionable leadership strategies.

15. Physical Resources:

Classes for this course will be held in five 3-hour online sessions over six weeks, with the Schulich School of Business proving all the necessary resources, including access via Zoom.

16. Bibliography and Library Statement:

All required course material will be made available to participating students through Schulich's Learning Management System (Canvas) to which they will be given access before, during and after the course, as needed. If necessary, students can access additional relevant material via the York University Library, as per the attached Library Statement.

MEMORANDUM

York University Libraries

To: Matthias Kipping

From: Sophie Bury, Teaching & Learning Librarian, Student Learning & Academic Success Department

Date: September 28th 2026

Subject: Library Statement of Support – AI Foundations for Executives (EMBA 6034)

Summary

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

Collections

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

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

- Artificial Intelligence, Generative artificial intelligence, Machine learning, Artificial Intelligence – Industrial applications, Generative artificial intelligence – Moral and ethical aspects.

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

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

A selection of additional electronic collections of particular interest to this course and assignments that form a part of it are highlighted below, and a complete listing of databases is available on the Business Databases A-Z webpage

Business Articles & Newspaper Collections:

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

Computer Science Articles/Collections

- IEEE Xplore Digital Library
- ACM Digital Library
- Web of Science
- Scopus

eBook Platforms:

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

Services

Library Instruction

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

Research Guides & eLearning Modules of Interest:

- EMBA Program: Self-Paced Library Research Module
- Artificial Intelligence Research Guide
- Business Citation Guide
- Business Articles Guide
- Computer Science Research Guide
- Using Generative AI to Do Research

Research Help

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

Accessibility Services

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

Kellogg Schulich

EXECUTIVE MBA GLOBAL NETWORK

Global Electives@Schulich
February 2027
EMBA 6032 Beyond Compliance: Leading Cybersecurity & Privacy Governance Across Enterprise

Instructor
Prof. Ghayda Nassar
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Assistant
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Instructor Biography

Ghayda Nassar is a seasoned executive and recognized thought leader in cybersecurity, privacy law, and AI governance, with over 20 years of leadership experience across financial services, telecom, government, and technology sectors. She has served as Assistant Vice President of Cybersecurity at leading Canadian banks, advised Boards of Directors, built enterprise-wide cyber programs, and led global privacy and compliance initiatives—bridging technical, legal, and business domains with strategic clarity. Ghayda also serves on the Advisory Council for Access to Innovation (A2I) at the Law Society of Ontario, providing strategic guidance on the approval of innovative technological legal service providers (ITLS) to ensure consumer access while safeguarding the public interest.

As a founder & CEO of Liberty Cybersecurity, Ghayda combines legal insight, technical fluency, and strategic foresight to help organizations navigate digital risk and transformation. She is also a professor of cybersecurity, teaching professionals and executives to translate complex topics into actionable leadership strategies. Her work spans global compliance, AI ethics, and organizational resilience, positioning her as a trusted advisor at the intersection of law, technology, and executive leadership.

Course Description

In an era of geopolitical instability, AI-accelerated threats, and intensifying regulatory pressure, cybersecurity and privacy governance are now enterprise-wide leadership responsibilities—not technical functions. This course equips executives to translate complex cyber and privacy risks into strategic decisions, elevate both disciplines from a compliance checklist to a source of competitive advantage and a driver of innovation and trust.

Through real-world cases, applied frameworks, and the Governance by Design methodology, participants learn how to assess risks holistically, embed governance into culture and decision-making structures, and apply actionable leadership practices immediately within their organizations. The course examines how Chief Information Security Officers (CISOs), Chief Privacy Officers (CPOs), cross-functional teams, and security and privacy champions collaborate to build resilient, accountable, and data-driven enterprises.

By the end of the course, executives will be prepared to recognize the role cybersecurity and privacy play in enterprise strategy, collaborate effectively, and ensure their own departments support a protected, compliant, and well-governed organization.

Course Learning Outcomes

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

1. Explain why cybersecurity and privacy are enterprise-wide leadership responsibilities in the context of geopolitical risk, AI-driven threats, and global regulatory demands.
2. Translate complex cyber and privacy risks into strategic business decisions that clarify trade-offs, strengthen resilience, and support organizational priorities.
3. Evaluate how cybersecurity and privacy create competitive advantage and trust through strong governance, ethical data practices, and proactive leadership.
4. Apply the Governance by Design methodology to assess or redesign processes, decisions, or initiatives, embedding governance into culture and operations.
5. Design lightweight, cross-functional governance structures—including roles for CISOs, CPOs, and champion networks—to align decisions across the enterprise and meet global regulatory expectations.

Deliverables at a Glance

Assignment/Task	Points	Weight %	Author/ (individual/Group)	Due
Pre-Class Video: Your Current Mental Model	20	20%	Individual	Before Class 1 (Jan 26)
Post-Class Video: Your Governance Evolution	20	20%	Individual	Feb 17
Group Assignment: Governance by Design Transformation Blueprint	40	40%	Group	Class 5 (Feb 22)
Class participation	20	20%	Individual	Feb 1, 3, 8, 10 & 22
Total	**100**	**100%**		

Course Material

There is no required textbook for this course. Instead, students will engage with relevant publications by academics, practitioners, and consultants. These readings are intentionally selected to complement the lectures and to ground classroom discussions in real-world executive practice.
All required readings for each class are listed under the corresponding class in this course outline. Students are expected to complete these readings in advance to fully participate in case discussions, group work, and in-class exercises.

Class Preparation and Participation

Individual participation grades will be awarded based on meaningful contribution to in-class discussions, new perspective, and full engagement with the material. Note that attendance does not equal participation. In-class discussions represent a major pedagogical dimension of this course; therefore, quality class participation is expected from each student. Comments and questions that demonstrate knowledge of the topic and intellectual curiosity will enhance the participation grade. Good participation is defined and measured as, "the consistent demonstration of good preparation and presentation of relevant thoughts about the readings, cases, and exercises".

Points	Contribution
0	Does not show up for class.
2-4	Attends all classes but says nothing or very little.
6-8	Contributes to the discussion – even if the contributions are not highly original; demonstrates understanding of the case and assigned material - i.e. summarizes reading material facts or asks questions for clarification and is usually prepared, having read the material before the class.
10-14	Makes meaningful contributions to the class by making points with elements of originality, bringing complementary perspectives that add constructively to the discussion. Demonstrates mastery of theoretical issues and concepts; is prepared for class having read and analyzed class assigned readings prior to class and makes contributions to the discussions; contributes to in-class group work.
16-20	Consistently makes substantive contributions to the class by presenting important points with a significant element of originality or demonstrating mastery of difficult theoretical issues or concepts; is always prepared having read and analyzed all reding material prior to class, shares in class presentations, contributes to in-class group work. Helps others master the material and dependably elevates the quality of class discussions.

Assignments: Description and Evaluation

Assignment 1: Pre-Classes Video: "Your Current Mental Model"
Weight: 20%
Due: Before Class 1 on January 26, 2027
Submission Method: Submit via Canvas in MP4 format
Purpose: To capture current understanding and mental models about cybersecurity, privacy, and governance — including misconceptions, oversimplifications, and mental shortcuts that the course will challenge and rebuild a strategic understanding.
Length: 2–3 minutes (Do not exceed 3!)

Instructions:
Record a short video answering three questions:

1- When your organization makes a major business decision (new product, new vendor, new market, new technology), at what point — if at all — do cybersecurity and privacy enter the conversation and why do you believe that timing is appropriate?
2- In your view, what is the primary purpose of cybersecurity and privacy in an organization: preventing incidents, avoiding fines, enabling trust, supporting strategy, or something else? Explain your reasoning.
3- If your CEO asked you today, 'Are we well-governed in cybersecurity and privacy?' — how would you answer, and what evidence would you use to justify your answer?

Evaluation Criteria and Grading Rubric:

Criteria	Excellent	Good	Needs Improvement	Points
1. Depth of Insight	5-6 points — Provides thoughtful, candid, and nuanced insight into how decisions, governance, and accountability currently work in their organization; demonstrates self-awareness and specificity.	3-4 points — Provides relevant insight but lacks depth, nuance, or specificity.	0–2 points — Superficial, generic, or overly polished answers; avoids real organizational realities.	6
2. Clarity in Describing Current Mental Models	5-6 points — Clearly articulates their current beliefs about cybersecurity, privacy, and governance; reveals assumptions and mental shortcuts without fear of being judged.	3-4 points — Articulates beliefs but with limited clarity or incomplete reasoning.	0–2 points — Unclear, vague, or inconsistent articulation of beliefs.	6
3. Use of Real Organizational Examples	4 points — Uses concrete, real examples from their organization to justify their answers.	2–3 points — Provides examples but they are generic or lightly described.	0–1 points — No real examples; answers remain theoretical.	4
4. Communication & Time Discipline	4 points — Clear, concise delivery; stays within the 2–3-minute limit; well-structured and easy to follow.	2–3 points — Mostly clear but may be slightly disorganized or exceed time by up to 30 seconds.	0–1 points — Unclear, rambling, or exceeds time by more than 30 seconds.	4

<u>Assignment 2: Post-Class Video: "How Your Understanding Changed"</u>
Weight: 20%
Due: After Class 4 on February 17, 2027
Submission Method: Submit via Canvas in MP4 format
Purpose: To demonstrate how the student's understanding has evolved across the course — and to make the transformation visible by answering the same questions with new clarity, plus one reflection.
Length: 2–3 minutes (Do not exceed 3!)
Instructions:
Record a short video answering three questions:

1- When your organization makes a major business decision (new product, new vendor, new market, new technology), at what point — if at all — do cybersecurity and privacy enter the conversation and why do you believe that timing is appropriate?
2- In your view, what is the primary purpose of cybersecurity and privacy in an organization: preventing incidents, avoiding fines, enabling trust, supporting strategy, or something else? Explain your reasoning.
3- If your CEO asked you today, 'Are we well-governed in cybersecurity and privacy?' — how would you answer, and what evidence would you use to justify your answer?
4- Reflection question: "What is the single biggest shift in your understanding between your first video and now?"

Evaluation Criteria and Grading Rubric:

Criteria	Excellent	Good	Needs Improvement	Points
1. Demonstrated Evolution in Understanding	7-8 points — Shows a clear, meaningful shift in thinking; articulates new understanding of governance, accountability, timing, and strategic purpose of cybersecurity & privacy.	5–6 points — Shows some evolution but lacks depth or clarity.	0–4 points — Minimal or no visible change from the first video.	8
2. Application of Course Concepts	5-6 points — Integrates concepts from the course (e.g., Governance by Design, accountability, trust, compliance maturity, decision-making systems) with clarity and relevance.	3-4 points — References course concepts but not deeply or consistently.	0–2 points — Little or no connection to course concepts.	6
3. Quality of Reflection on the "Shift"	4 points — Provides a thoughtful, specific reflection on what changed and why; identifies a clear "aha moment."	2–3 points — Reflection is present but general or surface-level.	0–1 points — Reflection is vague, missing, or not meaningful.	4
4. Communication & Time Discipline	2 points — Clear, concise, well-structured; stays within the 2–3 minute limit.	1 point — Mostly clear but slightly disorganized or exceeds time by up to 30 seconds.	0 points — Unclear, rambling, or exceeds time by more than 30 seconds.	2

<u>Assignment 3 (Group assignment): Governance by Design: Transformation Blueprint</u>
Weight: 40%
Due: Class 5 on February 22, 2027
Submission Method: In Class Presentation and submit the PowerPoint slides via Canvas
Purpose: To demonstrate how Governance by Design can be used to solve real organizational problems by embedding cybersecurity and privacy governance into decision-making, culture, and operations.
This assignment requires students to design a practical governance structure for an organization — one that reduces friction, clarifies accountability, strengthens compliance, and enables trust and competitiveness.

Assignment Overview: Each group will select one of their organizations, design a Governance-by-Design blueprint, and present it in 12 minutes or less during the class. This blueprint needs to address the following:

- Unclear accountability and decision bottlenecks
- Regulatory complexity and compliance firefighting
- Privacy maturity gaps
- Cybersecurity risk exposure
- Cross-functional misalignment and business-technology disconnect

The goal is to show how Governance-by-Design becomes the answer to these issues.

Required Components:

1. Organizational Context (1–2 minutes)

- Industry, size, regulatory environment
- Key pressures (AI, geopolitics, supply chain, customer trust, audits, etc.)
- One major organizational pain point related to cyber/privacy governance

2. The Governance Problem (2 minutes)

Identify one real governance failure or structural weakness, this must be specific, not generic.

3. Governance by Design Structure (6 minutes)

This is the heart of the assignment. Groups must design a practical governance operating system that includes:

A. Decision-Making Architecture

- Who decides what
- When decisions are made
- How decisions flow
- What triggers escalation
- How risk ownership is assigned

B. Accountability Map

This must show how accountability shifts from "security owns everything" to "the business owns risk."

C. Governance Structures

Design lightweight, scalable structure that will resolve the identified pain points and governance issues such as:

- Steering committees
- Data governance councils
- Privacy owners in business units
- Security & privacy champions
- Cross-functional working groups

4. Implementation Roadmap (2 minutes)

A simple, realistic plan:

- 30 days: What can be done immediately
- 90 days: What can be operationalized
- 6 months: What maturity looks like

Evaluation Criteria and Grading Rubric:

Criteria	Excellent	Good	Needs Improvement	Points
1. Clarity of Pain Points & Governance Frictions	5-6 points — Pain point is specific, high-impact, clearly articulated, and deeply connected to real organizational dynamics; demonstrates strong understanding of governance friction.	4–3 points — Pain point is relevant but lacks depth, specificity, or clear linkage to enterprise impact.	0–2 points — Pain point is vague, generic, or disconnected from real governance issues.	6
2. Quality of Governance-by-Design Structure	11-12 points — Governance structure is coherent, integrated, and highly practical; directly addresses the identified problem; demonstrates mastery of Governance by Design principles.	8–10 points — Structure is logical and relevant but lacks integration, depth, or strong alignment to Governance by Design.	0–7 points — Structure is superficial, theoretical, or not aligned with the identified governance issue.	12
3. Clarity of Decision-Making Architecture & Accountability	9-10 points — Decision-making architecture is clear, detailed, realistic; escalation triggers and risk ownership are explicit; accountability shift to business units is well-designed.	7–8 points — Decision-making model is present but incomplete, unclear, or not fully aligned with Governance by Design; accountability shift is implied but not explicit.	0–6 points — Decision-making model is vague, unrealistic, or missing; accountability remains unclear or unchanged.	10
4. Practicality & Feasibility of Implementation Roadmap	7-8 points — Roadmap is realistic, actionable, time-bound	5–6 points — Roadmap is reasonable but lacks detail, realism, or clear	0–4 points — Roadmap is impractical, overly theoretical, or	8

	(30/90/6-month), and demonstrates strong understanding of organizational realities.	sequencing; some milestones feel generic.	missing meaningful steps.	
5. Presentation Clarity, Time Discipline & Ability to Answer Questions	4 points — Presentation is clear, concise, well-structured, and delivered within or under the allotted 12 minutes; transitions are smooth; visuals support understanding; team answers questions confidently and demonstrates strong mastery of the material.	2–3 points — Presentation is generally clear but may be slightly disorganized or exceed the allotted time by up to 2 minutes; Q&A responses are adequate but not strong.	0–1 points — Presentation is unclear, disorganized, or exceeds the allotted time by more than 2 minutes; team struggles to answer questions or demonstrates limited understanding.	4

Assignments and Exams: General Rules

Late Submissions

- Please contact the instructor a reasonable time before the submission deadline if, for any reason, you require an extension for any assignment. Please note that a few hours prior to the deadline is not considered reasonable.
- Assignments received late without an approved extension will receive the standard EMBA penalty – i.e. one letter grade applied each week (or fraction thereof) that the assignment is late. For details see the *EMBA Guideline on Assignment Submission*.

Academic Honesty is fundamental to the integrity of university education and any degree program, and applies in every course offered at Schulich and within the Kellogg EMBA Global Network. This particular course is subject to the rules mandated by York University and the Kellogg Honor Code, which you signed at the outset of the program. For details please refer to your Student Guide and the following website:
http://www.schulich.yorku.ca/client/schulich/schulich_lp4w_lnd_webstation.nsf/page/Academic+Honesty!OpenDocument

Accommodations might be sought due to religious reasons, unavoidable absences or disabilities. In these cases, please contact the EMBA office (with copies to the instructor and the academic director).

Calculation of Course Grade

This course uses a points-based grading system. Each assignment is marked out of a fixed number of points (20, 20, 40, and 20). At the end of the course, the points earned on all assignments are added together to produce a total score out of 100 points.

The final course grade is then assigned by converting the total points into a letter grade using the Points-to-Letter-Grade scale shown below. This approach ensures transparency and allows students to track their progress throughout the course.

Letter Grade	A+	A	A-	B+	B	B-	C+	C	C-	F
Grade Points	90-100	85–89	80–84	77–79	73–76	70–72	67–69	63–66	60–62	Below 60

Class-by-Class Syllabus

Class 1 (Feb 1, 2027): Cybersecurity, Privacy & Governance: The Strategic Foundations

In this foundational class, participants will be introduced to the core concepts of cybersecurity, privacy, the governance frameworks that underpin both domains, and why cybersecurity is no longer an IT issue but a business survival and leadership responsibility. This session will also outline the course structure and clarify assignments expectations.
By the end of Class 1, students will leave with clarity on:

- What cybersecurity actually means at the enterprise level (beyond IT)
- What privacy actually is (beyond legal compliance)
- Why cybersecurity and privacy governance are now board-level strategic mandates
- The new threat landscape (AI, geopolitics, supply chain, insider risk)
- Why executives—not CISOs alone—own cyber outcomes

Class Readings:

- Harvard Business Review
  - "Cybersecurity Isn't Just an IT Issue" - https://hbr.org/2026/04/boards-are-falling-short-on-cybersecurity
  - "Why Boards Must Oversee Cybersecurity" - https://hbr.org/2025/05/boards-need-a-more-active-approach-to-cybersecurity

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Class 2 (Feb 3, 2027): Compliance as Strategy: From Obligation to Competitive Advantage

This class reframes compliance from a reactive checklist activity into a strategic leadership discipline that directly shapes competitiveness, trust, and long-term enterprise value. It explores why compliance is the floor, not the ceiling.
Participants will examine the global regulatory landscape across cybersecurity and privacy, not as a burden, but as a strategic operating environment that rewards organizations that move early, build maturity, and operationalize compliance into culture and decision-making.

Through real-world cases, participants will learn how to transform compliance from a cost center into a strategic differentiator that accelerates growth, strengthens partnerships, and reduces legal and reputational exposure.
Rather than memorizing laws, executives learn how to interpret regulatory intent, anticipate future requirements, and build governance structures that scale across jurisdictions.
By the end of Class 2, students will understand how to go beyond compliance and build the capabilities that enable:

- Operational efficiency (fewer incidents, clearer processes, reduced firefighting)
- Reduced legal and regulatory exposure (lower fines, fewer investigations, better audit outcomes)
- Stronger strategic positioning in regulated and high-trust markets (consistent regulatory alignment, clearer assurance to stakeholders, enhanced market access)
- Embedding compliance into culture and decision-making

Class Readings:

- Harvard Business Review
    - "Turn Privacy Regulation into a Competitive Advantage" - https://hbr.org/topic/subject/cybersecurity-and-digital-privacy?utm_source=copilot.com
    - "Data Privacy Is a Growth Strategy" - https://hbr.org/topic/subject/cybersecurity-and-digital-privacy?utm_source=copilot.com

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Class 3 (Feb 8, 2027): Cybersecurity & Privacy as Drivers of Trust

This class examines how cybersecurity and privacy function as strategic drivers of trust, competitiveness, and organizational resilience. Moving beyond legal compliance, the class explores privacy as a business obligation, a market access requirement, and a core component of an organization's value proposition that shapes stakeholder confidence and enables sustainable growth in high-trust and regulated markets. The session also clarifies the relationship between privacy and cybersecurity—distinct domains with complementary roles—and demonstrates how both contribute to enterprise-wide trust, brand differentiation, long-term competitiveness, and stronger relationships with customers, employees, and partners.
By the end of Class 3, students will be able to:

- Explain how privacy functions as a business obligation, not a legal checkbox
- Assess how privacy enables market access across jurisdictions (GCC, EU, Canada, global transfers)
- Evaluate how privacy and cybersecurity together strengthen trust, resilience, and competitiveness
- Identify how organizations convert compliance maturity into competitive advantage and stakeholder confidence

This class equips leaders to understand privacy and cybersecurity not only as risk-management functions, but as strategic levers of trust, credibility, and market differentiation.

Class Readings:

- Harvard Business Review

    - "Why Trust Is the New Competitive Advantage" - https://hbr.org/2020/01/why-trust-is-the-new-competitive-advantage
- McKinsey & Company
    - Cybersecurity: A Strategic Asset for Trust and Growth - https://www.mckinsey.com/capabilities/risk-and-resilience/our-insights/cybersecurity-for-the-board

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Class 4 (Feb 10, 2027): Governance by Design: Aligning Cybersecurity, Privacy, and Enterprise Decision-Making

This class introduces governance as an enterprise-wide mechanism for managing cybersecurity and privacy risks in complex organizations. Rather than treating governance as documentation or compliance artifacts, the class positions governance as a decision-making system—the structure through which accountability, escalation, and risk ownership are defined and enforced. Students examine how "Governance-by-Design" transforms organizations by reducing friction, cost, and risk; preventing "bolt-on compliance"; and enabling "built-in trust" across business units, technology teams, and leadership.
The session also explores how governance bridges strategy and execution, ensuring that every security and privacy investment directly supports business outcomes. Students analyze how champion programs, committees, and cross-functional structures operationalize governance, shift accountability into business units, and engage CISOs, CPOs, CIOs, Legal, HR, and operational leaders in shared responsibility.
By the end of Class 4, students will be able to:

- Explain governance as a decision-making system—not a framework or document
- Evaluate how Governance-by-Design reduces friction, cost, and organizational risk
- Assess how governance aligns cybersecurity and privacy with enterprise strategy and operational reality
- Identify how champion programs and cross-functional committees distribute accountability across business units
- Recognize how governance failures derail projects, transformations, and trust

Class Readings:

- MIT Sloan
    - The Decision-Driven Organization - https://sloanreview.mit.edu/article/the-decision-driven-organization/
    - Designing Governance for Digital Transformation - https://sloanreview.mit.edu/article/designing-governance-for-digital-transformation/
- Harvard Business Review
    - What Effective Top-Level Governance Looks Like - https://hbr.org/2020/03/what-effective-top-level-governance-looks-like

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Class 5 (Feb 22, 2027): Group Presentations and Program Closure

This class will be course conclusion and reflection, we will conclude with a reflective discussion on the learning journey, encompassing key takeaways, insights gained, and potential applications of the skills acquired in professional contexts.

Also in this class, each group will present their group project, demonstrating their understanding and application of the course material and content. This presentation will serve as an opportunity for participants to showcase their skills and knowledge gained during the course.

EMBA 6033 2.0 Luxury Strategy

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

2. **Course Number:** EMBA 6033

3. **Credit Value:** 2.0

4. **Long Course Title:** Luxury Strategy

5. **Short Course Title:** Luxury Strategy

6. **Effective Session:** Winter 2027

7. **Calendar (Short) Course Description:**
   The course explores how luxury firms develop competitive strategies, create remarkably valuable brands, and enjoy enduring success. It will present a framework for developing a luxury market strategy, which draws from various disciplines, and will be applied to a range of case studies. It also looks at what other firms can learn from the success of luxury firms and brands.

8. **Expanded Course Description:**
   The course explores how luxury firms develop competitive strategies, create remarkably valuable brands, and enjoy enduring success. The class will focus on presenting a framework for developing a strategy for luxury markets, by (i) distinguishing luxury from mass markets and luxury brands from simply high-priced brands in terms of, among others, status, price, and exclusivity; (ii) understanding why consumers value luxury brands and pay extraordinary prices for them, when excellent, less expensive alternatives exist; (iii) examining the strategies firms use to create and evolve valuable luxury brands compared to mass-market brands; and (iv) identifying the key differences between competition among mass-market and luxury brands and the ways in which luxury brands create and sustain competitive advantage, sometimes for decades. Last not least, the course will also look at what aspects of luxury strategy mass-market firms like Apple and Starbucks have incorporated in their marketing and what other firms can learn from the success of luxury firms and luxury bands.

9. **Course Learning Outcomes:**
   Upon completion of the course, students will be able to:
   - Distinguish luxury markets and luxury brands from other markets and brands, including but also going beyond price and exclusivity.
   - Identify the strategies and competitive success factors of luxury firms compared to mass-market ones, including how they evolve their brands.
   - Understand what other firms can learn from the success of luxury brands and firms and incorporate into their own strategies.

10. **Rationale:**
    For many years, the world's most successful firms have also been the largest: McDonald's, which serves 69 million customers every day in 36,000 restaurants; Netflix with over 300 million subscribers around the globe; or Amazon, which ships to 100 countries and has an

estimated 250 million subscribers to its Prime service. Luxury firms, on the other hand, historically served lucrative niches, selling flashy Italian sports cars, prized French wine, and enviable handbags to the super rich. But consumer spending on luxury has surpassed $1.7 trillion in 2024, and luxury companies have become some of the world's most valuable firms, with the market value of the French luxury giant LVMH reaching $350 billion in 2024, surpassing the value of Intel, Cisco, SAP, and Novartis. As luxury firms have become more valuable, so have their brands. Ferrari, Hermès, Louis Vuitton and other luxury marques now account for twenty of Interbrand's 100 most valuable global brands. And while the rise of luxury firms may be a relatively recent phenomenon, their success is remarkably enduring, with some of them thriving for centuries. For all these reasons most of our students should be able to learn from what has made these firms and many of their brands so enduring and successful, even if only a few of them might ever work in luxury.

11. **Evaluation:**
    All assignments for this course are individual, including class participation (30%), with students expected to be prepared and present as well as making substantive contributions to class discussions; a written analysis of one of the cases to be discussed in class (30%), and a final online open-book exam (40%). Work received past its deadline will not receive any credit.

12. **Integrated Courses:**
    NOT integrated

13. **Crosslisted Courses:**
    NOT crosslisted

14. **Faculty Resources:**
    This course is being offered as an elective to all students from the Kellogg EMBA global network during the Winter term at the Kellogg School of Management of Northwestern University in Evanston, Illinois, USA. It will be taught by Gregory S. Carpenter, who is the Harold T. Martin Professor of Marketing and Director of the Center for Market Leadership at Kellogg. His current research focuses on understanding the role of customers and brands in the success of luxury firms, which are now among the most valuable companies in the world. He has published its results in leading academic as well as practitioner-oriented outlets. He also often speaks to and advises leading companies.

15. **Physical Resources:**
    Classes for this course will be held over one week at the temporary Chicago campus of the Kellogg Executive MBA program, which will provide all the necessary physical resources.

16. **Bibliography and Library Statement:**
    All required course material will be made available to participating students through Kellogg's Learning Management System (Canvas) to which they will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

MEMORANDUM

York University Libraries

To: Matthias Kipping

From: Sophie Bury, Teaching & Learning Librarian, Student Learning & Academic Success Department

Date: September 24th, 2026

Subject: Library Statement of Support – Luxury Strategy (EMBA 6033)

Summary

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

Collections

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

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

- Luxuries – Marketing, Luxury goods industry, Luxuries, Brand loyalty, Consumer behavior.

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

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

A selection of additional electronic collections of particular interest to this course and assignments that form a part of it are highlighted below, and a complete listing of databases is available on the Business Databases A-Z webpage

Market Research Databases

- IBISWorld
- BMI
- Marketline Advantage
- Passport
- SimplyAnalytics
- Statista
- Vivintel
- World Advertising Research Database

Company Databases

- Mergent Intellect
- PrivCo
- PitchBook
- Marketline Advantage

Business Articles & Newspaper Collections:

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

eBook Platforms:

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

Services

Library Instruction

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

Research Guides & eLearning Modules of Interest:

- EMBA Program: Self-Paced Library Research Module
- Market Research Guide
- Advertising Research Guide
- Industry Research Guide

- Business Citation Guide
- Business Articles 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.

SAMPLE

NORTHWESTERN UNIVERSITY
KELLOGG SCHOOL OF MANAGEMENT

Luxury Strategy
Marketing

Professor Gregory S. Carpenter
2027

For many years, the world's most successful firms have also been the largest. McDonald's serves 69 million customers every day in 36,000 restaurants, over 300 million people subscribe to Netflix, and over 75 percent of American has chosen to become a member of Amazon Prime. Luxury firms, on the other hand, historically served lucrative niches, selling flashy Italian sports cars, prized French wine, and enviable handbags to the super rich.

But in recent years the sales of Gucci, Chanel, and Cartier have boomed. Consumer spending on luxury is surpassed $1.7 trillion in 2024. With growing sales and a broader appeal, luxury companies have become some of the world's most valuable firms. In 2024, the market value of LVMH reached $350 billion, making the French luxury giant among the most valuable company in Europe—surpassing the value of Intel, Cisco, SAP, and Novartis. As luxury firms have become more valuable, so have their brands. Ferrari, Hermès, Louis Vuitton and others luxury marques now account for twenty of Interbrand's 100 most valuable global brands.

Although the rise of luxury firms may be a relatively recent phenomenon, their success is remarkably enduring. For many firms, success can be fleeting, as Blockbuster, Blackberry, and Yahoo illustrate so vividly. Apple, General Electric, and General Motors and others defied the odds, thriving for years or even decades. Some luxury firms, however, have thrived for centuries. Thierry Hermès opened his workshop to make saddles and leather riding gear in 1837, LVMH's Hennessy began distilling cognac in 1765, and monks made wine in 1282 from the vineyards now owned by Domaine de la Romanée-Conti. Some luxury firms continue to thrive, having survived the Black Plague, world wars, and the Great Depression.

COURSE OBJECTIVES

In this course, we explore how luxury firms develop competitive strategy, create remarkably valuable brands, and enjoy enduring success. The class will focus on presenting a framework for developing strategy for luxury markets. In doing so, we will explore many questions, including the following:

- *Luxury versus mass markets*. How are luxury markets different from mass markets?What distinguishes luxury from simply high-priced brands? Is luxury simply about status or price? Is luxury exclusive or universal?

- *Luxury consumers*. Why do consumer value luxury brands? Why do consumer pay extraordinary prices for luxury brands when excellent, less expensive alternatives exist?

- *Luxury brands*. How do firms use strategy to create luxury brands compared markets versus mass-market brands? What makes luxury brands valuable? How do firms create valuable luxury brands? How do luxury brands successfully evolve?

- *Luxury competition*. How do luxury brands succeed? What are the key differences between competition among mass-market and luxury brands? How do luxury brands create and sustain competitive advantage, sometimes for decades?

- *Learning from luxury*. Mass-market firms like Apple and Starbucks have incorporated aspects of luxury strategy in their marketing. What can other firms learn from luxury firms the success of luxury brands?

SAMPLE

Faculty

At the Kellogg School, I am the Harold T. Martin Professor of Marketing and the Director of the Center for Market Leadership. I investigate how marketing strategy contributes to firms' success. My research appears in leading academic journals such as *Journal of Marketing, Journal of Marketing,* and in the popular press including *Harvard Business Review* and *Sloan Management Review.* National Public Radio and *The Financial Times* have featured my research and the American Marketing Association has recognized my research with five awards for its impact in marketing.

The focus of my work has shifted to luxury strategy. My research on luxury appears in *Journal of Marketing* and *Harvard Business Review.* I have advised Champagne Louis Roederer, Harley-Davidson, and I served on the advisory board of Terlato Wine Group. I was dubbed a Chevalier in the Ordre des Coteaux de Champagne for my contribution to the industry. I will share some recent as well as on-going research on luxury throughout the class.

Class Structure

Our class discussions will focus on developing and illustrating a framework for luxury strategy. Concepts for the framework come from a range of disciplines. We will discuss the concepts and illustrate them with a broad range of examples. The majority but not all examples will be from luxury brands. But I have chosen the examples to illustrate concepts that are important to luxury strategy. We will explore the framework with cases focused on luxury brands.

During the quarter, teams of students will apply the framework to a luxury brand of the team's choosing. Each team will complete a series of exercises analyzing the causes of the brand's success and the future challenges it faces. Teams will deliver presentations on elements of their analysis throughout the quarter. The final class will be devoted to presentations of each team's complete analysis.

Course Requirements

Class participation (30%). Your participation in our class sessions is important to everyone's experience in the class. Our discussion are focused to deepen your understanding of critical concepts. I will assume that you are fully prepared to join the discussion. If you are unable to join the class on time, prepare for class, and fully engaged for the entire class, please let me know *before class.* The substance of your participation is more important than the frequency or volume of comments. If you miss more than two classes, your grade for class participation will suffer, which can affect your overall grade. The school has a form you can submit for an excused absence. You can find a link to the form on the course Canvas homepage.

Case analysis (30%). Each student is required to submit *one written case analyses.* It is individual assignments. You are free to choose among the cases we will discuss, with the exception of the el Bulli case discussed in the first class. Your analysis is limited to three, double-spaced pages. Papers received after the deadline will receive comments but no credit..

Final exam (40%). The course has a final exam, which will be available online during exam week. It is an individual, open-book exam. It will cover all the material we discussed in class and the required reading.

Text and Readings

Kapfrer, Jean-Nöel, and Vincent Bastien (2012), *The Luxury Strategy: Break the Rules of Marketing to Build Luxury Brands* (London: Kogan Page).

Readings are listed under each class session. I will post the slides presented in class. My slides and the readings are copyrighted and made available to you with the permission of the copyright owner. Unauthorized copying or distribution of any course materials violates the owner's copyright and is strictly prohibited.

You are responsible for the content of the classes and the required readings on the final exam. I've also included some optional readings. You may find these interesting and you are not responsible for these on the final exam.

Classroom Etiquette

Laptops. Please refrain from using your laptops during class.

Phones. Please refrain from using your phone during class, except for emergencies obviously.

Electronic capture. Personal recording, photography, or any other electronic capture of any portion of the class for any use is not allowed. I will request that our classes be recorded and posted on Canvas.

Assistive technologies. Accommodations approved via AccessibleNU are encouraged and welcome.

Guest speakers. We will have guest speakers during the class. Your attendance and your participation during these sessions is a reflection of the Kellogg School. I trust you will make every effort to attend class regularly but especially on the days we have a guest visiting Kellogg.

Course Support

You can reach me with questions or concerns via email (g-carpenter@kellogg.northwestern.edu) or phone (847 491 2717). We can arrange a time to meet to discuss questions related to the course, luxury, or marketing more generally.

You can find useful resources for safety and security, academic support, and mental and physical health and well-being on the NU help websites and app.

Honor Code

Integrity is critical to the learning process and the success of Kellogg. I expect all students to abide by the Kellogg Honor Code and Kellogg Code of Etiquette, as should you. For more information, go to https://www.kellogg.northwestern.edu/policies/honor-code.aspx

In addition to Kellogg's honor code, the following applies to this class: (1) written cases will be prepared individually by the student who submits the work. You should not discuss the case with other members of the class before submitting your paper. You should rely only on the material provided with the case; that is, do not use additional materials found online or elsewhere. (2) The final exam is to be completed individually. (3) The case solutions should not be discussed with students outside of class.

SAMPLE

Class Sessions

Class 1 Luxury Strategy Introduction

Kapfrer, Jean-Nöel, and Vincent Bastien (2012), *The Luxury Strategy: Break the Rules of Marketing to Build Luxury Brands* (London: Kogan Page), chapters 1 and 2.

Bain & Company, "Luxury in Transition: Securing Future Growth."

Class 2 Luxury Buyers

Klasa, Adrienne, Lauren Indvik, Harriet Agnew, and Gloria Li (2023), "Will the extraordinary boom in luxury goods ever end?," *Financial Times*, April 26.

Case: el Bulli's Magic Recipe (IESE 0-608-017).

Classes 3 & 4 The Brand Dream

Kapfrer, Jean-Nöel, and Vincent Bastien (2012), *The Luxury Strategy: Break the Rules of Marketing to Build Luxury Brands* (London: Kogan Page), chapter 5.

Dubois, David, SungJin Jung, and Nailya Ordabayeva (2021), "The Psychology of luxury consumption," *Current Opinions in Psychology*, 39, 82-87.

Case: Ferrari (HBS 9-618-047).

Classes 5 & 6 Staging the Dream

Beverland, Michael B. (2014), "Building Brand Authenticity," in Kartikeya Kompalla (Ed.) *The Definitive Book of Branding* (Los Angeles: Sage), 110-131.

Trebay, Guy (2023), "What's the status of flaunting your status?," *The New York Times*, July 22.

Wilson, Jonathan A. J., Giana M. Eckert, and Russel W. Belk (2015), "Luxury Branding Below the Radar," *Harvard Business Review*, September.

Classes 7 & 8 Achieving the Dream

Kapfrer, Jean-Nöel, and Vincent Bastien (2012), *The Luxury Strategy: Break the Rules of Marketing to Build Luxury Brands* (London: Kogan Page), chapters 3 and 7.

Andejelic, Ana (2021), "Want more loyal customers? Offer community not rewards," *Harvard Business Review*, February 9.

Case: Rolex SA (HBS 9-521-034).

SAMPLE

Class 9 BRAND CAPITAL

Gupta, Sunil, Donald R. Lehmann and Jennifer Ames Stuart (2004), "Valuing Customers," *Journal of Marketing Research*, 41, 7-18.

Case: Château Margaux: Serving Up the Third Wine (HBS 9-521-054).

Class 10 PREMIUM BRANDS & COURSE CONCLUSION

Goldstein, Guy, and Gregory S. Carpenter (2022), "Legitimately Luxurious: Creating Authentic Luxury Brands," *Business Horizons*, 65, 631-642.

Silverstein, Michael, and Neil Fiske (2003), "Luxury for the Masses," *Harvard Business Review*, April.

Graduate Studies, Office of the Dean
York University
230 York Lanes - 4700 Keele Street
Toronto, ON, Canada M3J 1P3
Tel: (416) 736-5521
gradstudies.yorku.ca

EMBA 6034 2.0 AI Foundations for Executives

1. **Program:** Kellogg-Schulich Executive MBA
2. **Course Number:** EMBA 6034
3. **Credit Value:** 2.0
4. **Long Course Title:** AI Foundations for Executives
5. **Short Course Title:** AI Foundations for Executives
6. **Effective Session:** Winter 2027
7. **Calendar (Short) Course Description:**
   This immersive course provides students with extensive hands-on experience with generative AI, equipping them with practical skills to immediately apply these technologies in business contexts. In five three-hour sessions, they will go from AI outsider to AI insider, taking steps toward building solutions while developing the essential vocabulary and conceptual framework to navigate the rapidly evolving AI landscape.
8. **Expanded Course Description:**
   The course will target the latest AI developments and therefore focus much more on generative AI than on traditional machine learning and analytics. The “operations” flavour comes from a focus on “agentic AI”—AI systems that actually perform work. AI agents are among the latest and most important developments in generative AI and leveraging them is a deeply operational question. This course is therefore meant to be as hands-on as possible: students will actually build AI products and figure out how to create value with them.
9. **Course Learning Outcomes:**
   Upon completion of the course, students will be able to:
   • Understand how generative AI actually works.
   • Distinguish between AI products that add value and those that don’t.
   • Build and use agentic AI products.
10. **Rationale:**
    AI is advancing at an unprecedented pace. The best way to understand its potential is not just to study it, but to use it, which is why this course should be relevant to all those who want to (a) know about the latest AI developments, viz., generative and agentic AI and (b) (b) learn how to build an AI agent. The latter will serve as a “vehicle” to build expertise in AI, since these agents are practical to build, sophisticated enough to reveal how AI really works, and relevant enough to spark discussions about operations, human collaboration, and organizational transformation. Ultimately, this course is designed to be a stepping stone in the AI journey of executives, enabling them to stay current as AI continues to evolve. Since quite a few of our students are in this kind of situation, the course and the practical applications it promises should be of considerable interest to them, despite numerous other AI courses offered as electives, which will help solidify and diversify their expertise.

11. Evaluation:

Assignments for this course include class participation, based on attendance, engagement, and effort (25%); submission of homework designed to familiarize students with the required technical knowledge (25%); and a final project, where students build their own AI agent (50%).

12. Integrated Courses:

NOT integrated

13. Crosslisted Courses:

NOT crosslisted

14. Faculty Resources:

This course is being offered as an elective to all students from the Kellogg EMBA global network during the Winter term at the Miami campus of the Kellogg School of Management of Northwestern University. It will be taught by Sébastien Martin who is an Associate Professor of Operations. His research focuses on designing and implementing AI/automation systems that solve real-world business challenges. He designed Lyft's reinforcement learning approach to matching drivers and passengers. He is also passionate about incorporating AI in education: he created Kai, Kellogg's teaching assistant, introduced the first AI-powered case studies, and was named a Poets & Quants '40 Under 40' MBA professor in 2025.

15. Physical Resources:

Classes for this course will be held over one week at the Miami campus of the Kellogg Executive MBA program, which will provide all the necessary physical resources.

16. Bibliography and Library Statement:

All required course material will be made available to participating students through Kellogg's Learning Management System (Canvas) to which they will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

MEMORANDUM

York University Libraries

To: Matthias Kipping

From: Sophie Bury, Teaching & Learning Librarian, Student Learning & Academic Success Department

Date: September 28th 2026

Subject: Library Statement of Support – AI Foundations for Executives (EMBA 6034)

Summary

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

Collections

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

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

- Artificial Intelligence, Generative artificial intelligence, Machine learning, Artificial Intelligence – Industrial applications, Generative artificial intelligence – Moral and ethical aspects.

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

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

A selection of additional electronic collections of particular interest to this course and assignments that form a part of it are highlighted below, and a complete listing of databases is available on the Business Databases A-Z webpage

Business Articles & Newspaper Collections:

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

Computer Science Articles/Collections

- IEEE Xplore Digital Library
- ACM Digital Library
- Web of Science
- Scopus

eBook Platforms:

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

Services

Library Instruction

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

Research Guides & eLearning Modules of Interest:

- EMBA Program: Self-Paced Library Research Module
- Artificial Intelligence Research Guide
- Business Citation Guide
- Business Articles Guide
- Computer Science Research Guide
- Using Generative AI to Do Research

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.

AIML 901

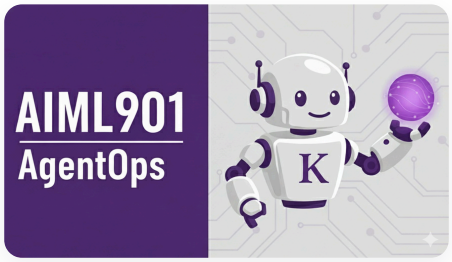
Syllabus

Sébastien Martin

See what past students built!

Explore the Project Showcase featuring projects from course alumni—complete with pitch videos, descriptions, and real-world AI applications across industries.

AIML-901OP-5 AI Foundations for Managers - AgentOps



Kellogg School of Management
Instructor: Sébastien Martin
Email: sebastien.martin@kellogg.northwestern.edu
Website: sebastienmartin.info

Course Overview

AI is advancing at an unprecedented pace. The best way to understand its potential is not just to study it, but to use it. This immersive course provides Kellogg students with extensive hands-on experience building with generative AI, equipping you with practical skills to immediately apply these technologies in business contexts. In just five weeks, you will go from AI outsider to AI insider, taking your first steps toward building solutions while developing the essential vocabulary and conceptual framework to navigate the rapidly evolving AI landscape. *Let's get building!*

Course Features

- State-of-the-Art: While "AI" has many meanings, the focus of this course is on the *latest* AI developments. We will mostly study generative and agentic AI.
- Lab format: The best way to understand AI's strengths and limitations is to use it. The main deliverable is a project; weekly recitations are focused on building with AI, and most lectures include hands-on activities.
- Leveraging AI Agents in n8n: AI agents are the perfect vehicle to build expertise in AI. They are practical to build, sophisticated enough to reveal how AI really works, and relevant enough to spark discussions about operations, human collaboration, and organizational transformation. We will use *n8n*, a leading AI agent and automation platform. n8n is accessible enough without coding background, yet powerful enough to allow for deep technical exploration.
- Preparing You for the Future: This course is designed to be a stepping stone in your AI journey, enabling you to stay current as AI continues to evolve.
- AI-Powered Learning Support: This course will heavily leverage AI to support learning. This will include AI homework, AI teaching assistants, and AI-powered case studies.

Content

There are several versions of AIML-901, each taught by a different department. They all serve as a general introduction to AI for MBAs, and all touch on the following topics:

- AI and Machine Learning history.
- Machine Learning basics.
- Generative AI.
- Accountability, ethics, fairness, governance, and future considerations.
- AI applications in business and the manager's role.

However, each course is truly unique! This course focuses on agent AIML-901 and is taught in a lab format. Its focus is to be *as hands-on as possible*: we will actually build AI products and figure out how to create value with them. We will also *target the latest AI developments*, and therefore focus much more on generative AI than on traditional machine learning and analytics. The "operations" flavor comes from our focus on "agentic AI"—AI systems that actually perform work. AI agents are among the latest and most important developments in generative AI, and leveraging them is a deeply operational question.

With this version of the course, you will learn:

- how to build agentic AI products (the best way to know something is to be able to use it)
- how the genAI technology actually works (understanding a technology is key to leveraging it)
- how to create AI products that actually add value (it's not because a technology is amazing that it is useful)

I highly recommend taking other versions of the AIML-901 course. They all choose very different approaches to introducing AI, and I believe that the more perspectives you get, the better. For the most part, they are complementary rather than substitutes.

Pre-requirements

This course is designed to be accessible to all Kellogg students without prerequisites (no need to know how to code!), regardless of technical background. If you have any doubts, please reach out.

However, the course is also meant to *challenge you*! Our goal is to bring you up to speed on the latest AI developments, and achieving this in just 5 weeks will be a significant challenge. But I promise that it will be worth it!.

Instructor

Professor Martin is an associate professor of operations, whose research focuses on designing and implementing AI/automation systems that solve real-world business challenges. He designed Lyft's reinforcement learning approach to matching drivers and passengers and also works on a similar project at Waymo. He is passionate about incorporating AI in education: he created Kai, Kellogg's teaching assistant, introduced the first AI-powered case studies, and was named a Poets & Quants '40 Under 40' MBA professor in 2025. Outside research and teaching, he also consults with companies on AI strategy and serves as a board member of the industrial compounder ESAB, particularly focusing on their AI transition.

Deliverables and Expectations

Recitations: learning how to build an agent

The course includes five recitations, each lasting 60 minutes and led by our expert TA (in-person for Full Time, live on Zoom for E/W). The recitations will focus on learning how to build AI agents using n8n, which is the main technical knowledge you will need. The recitations will be hands-on and interactive, each one focused on a specific business use case and gradually introducing more complex agentic workflows.

Recitations will be divided into two sections.

- Core content: We will begin by developing skills that you are expected to understand and be able to use independently. During this section, you will be given time to explore and expand upon these tools.
- Exploratory content: The latter portion of the recitation will focus on broader, inspirational demos to showcase what is possible with n8n. You won't be expected to master the skills immediately; this is mostly to give you ideas on what to explore on your own. Additionally, we encourage you to explore n8n templates (pre-made projects by others), YouTube tutorials, and other resources.

Attendance at the recitations is not required but strongly recommended—live sessions (whether in-person or on Zoom) are interactive and let you ask questions in real-time. Recordings are also available after each recitation.

Each recitation is associated with a graded homework. Together, they will count for 25% of the final grade.

Individual Project

The main deliverable for this course is an individual project where you will build your own AI agent using n8n. This is the main deliverable of the course. The project's goal is two-fold: demonstrating your ability to make impressive AI agents and to do so in a way that actually creates value in a business context.

In a nutshell, the project is the evaluation mechanism of the course and will leverage everything we will learn. For a great project, you need to:

- Work on a topic you are *deeply familiar with*. As we will see, a great AI project is 5% AI knowledge, 95% domain knowledge. This is the only way to create a project that would genuinely add value. Ideally, the project's target should be either a previous company/organization you worked for, or a startup/product idea you have and want to work on.
- Have enough knowledge of AI to know the good ways to use it (i.e., you followed the lectures).
- Know how to build agents (i.e., you went through the recitations).

Deliverable:
A recorded presentation video (8 minutes), together with a working MVP of your AI workflow using n8n.

The video must include:

- An explanation of the business context and the problem you are trying to solve.
- A live demo of your AI agent in action, featuring n8n and any other tools of your choice.
- A demo of the "evaluation" of your agent: is it doing a good job?
- A discussion of the implementation path you suggest and why you think this change can truly add value.

Grading:

- 40% idea/implementability/business value of your proposal
- 40% technical implementation
- 20% quality of the presentation

For more information, check out the project page.

Homework

Before class, a "Kai homework" will often be assigned. You will have a guided conversation with an AI teaching assistant (Kai) to prepare you for the next class, and you will submit your conversation on Canvas.

- Homework is graded for effort, not results.
- You will get full credit if you took it seriously and spent the time, regardless of accuracy.

More information is available in the Kai instructions.

Grading Rubric

The final grade will be based on:

- 50% Individual project
- 25% Recitations submissions
- 25% Participation (attendance, engagement, and homework effort)

Attendance and Participation

Attendance, timeliness, and in-class contributions are extremely important to me, as everyone benefits from a positive learning environment.

- In-class contributions consist mainly of voluntary participation.
- Occasionally, I also use "warm calling," where I give you a heads up and ask you a question about something you already wrote in a class preparation homework.
- On-time attendance is required.
- Only health/religious/funeral-related absences are officially excused by Kellogg. If you are in this situation, *reach out to Academic Experience*, as they have a form for you to fill out.
- You have one free pass for other absences. Additional absences will reduce your participation grade proportionally.

- Per Kellogg policy, more than 20% unexcused absences may result in a failing grade.

AI Policy

The use of AI in this course is encouraged and you will be given access to many AI tools. We will both learn about how to use AI and also use AI to help us learn.

However, AI is a double-edged sword; while it may be tempting, try not to use it as a “black box” that does the work for you without seeking to understand how and why it produces its results.

Classroom Etiquette and Honor Code

We follow the Kellogg Honor Code and the Code of Classroom Etiquette.

You may not:

1. Engage in cross-talking.
2. Engage in disruptive movement (e.g., arriving late or leaving class unnecessarily).
3. Use a smartphone, laptop, or other device outside of designated times.
    - Tablets are allowed for note-taking, but only if used flat on the table.
    - Laptops are required during designated hands-on times, but are not allowed otherwise.
4. Engage in any other inappropriate or disruptive behavior.

Software, Tools and Costs

I’ve done my best to keep costs low. Expected costs/resources:

- ChatGPT/Claude/Gemini subscription recommended but not required. If you don’t know what to choose, I recommend ChatGPT Plus.
- n8n: free (the course is sponsored by n8n).
- Lovable: free (1 month sponsored access).
- Kai (AI TA) and AI-powered case studies: free (covered by Kellogg).
- Required cost: OpenAI API usage for your AI agents.
    - Expect total API costs of about $5-10 for the entire course.

Class Overview

There are 10 classes—two per week—organized into two modules. There is also one recitation per week. The precise content of each class is subject to modifications, as we are updating the content constantly to match the speed of AI improvement.

> E/W Section
>
> Classes are combined into five 3-hour sessions (Session 1 = Classes 1–2, Session 2 = Classes 3–4, etc.). Recitations are held live on Zoom.

- Class 1: Let’s Get Building Dive straight into action using and creating AI agents while exploring course deliverables and expectations.

Module 1: From Zero to the AI Frontier

Build a deep understanding of genAI, how AI companies go from raw web data to ChatGPT and powerful AI agents, and how to control them.

- Class 2: Pretraining a Large Language Model Train your own LLM from scratch to demystify how these powerful models actually learn from data.
- Class 3: Post-training and Alignment Discover the crucial steps that transform a raw LLM into a helpful, safe, and reliable AI assistant.
- Class 4: Prompting LLMs Now that the AI company has created a useful LLM, let’s take control of it—this hands-on session explores prompting techniques across several use cases, a skill fundamental to everything in this class.

- Class 5: AI Agents How AI agents work (we finally understand n8n fully!), how to give them tools (RAG, etc.), and how to use them. We'll also have significant hands-on time with coding agents like Codex and Claude Code, which represent the frontier of agentic AI.
- Class 6: The AI Frontier An exploration of the state-of-the-art AI technologies and where all of this might be going.

Module 2: Leveraging AI for Impact

Bridge the gap between powerful AI tools and measurable business impact through agent ops, evaluation, strategy, and change management.

- Class 7: AgentOps How do we go from "I can build a cool AI prototype" to "real world impact"?
- Class 8: Evaluation and Continuous Improvement How do we know if our AI workflow is working? How can we improve it?
- Class 9: Change Management and Innovation A deep dive into the Proxima Health case study—how do you drive impact with AI?
- Class 10: Keeping up with AI "Kai awards", advice to keep learning about AI, Farewell

Recitations

- Recitation 1: Let's Build a Google Calendar Agent (Getting Started with n8n)
  Master the fundamentals of n8n, your go-to platform for creating and testing intelligent agents.
- Recitation 2: Let's Build an Email Triage Agent (n8n Deep Dive)
  Level up your n8n skills with advanced features that will empower your course project.
- Recitation 3: Let's Build a Bilingual Communications Agent (Advanced n8n Usage)
  Expand your project's capabilities with advanced n8n functionalities to explore on your own.
- Recitation 4: Creating End-to-End Products with AI Transform your agent backends into polished products using Lovable and other tools to create beautiful apps and websites.
- Recitation 5: Let's Build an Expense Categorization Agent (Agent Evaluation)
  Build a robust evaluation pipeline in n8n, a critical requirement for your project's success.

If you read this, thank you for being my student.

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EMBA 6036 4.0 Governing for Generational Growth

1. **Program:** Kellogg-Schulich Executive MBA
2. **Course Number:** EMBA 6036
3. **Credit Value:** 4.0
4. **Long Course Title:** Governing for Generational Growth
5. **Short Course Title:** Governing for Generational Growth
6. **Effective Session:** Winter 2027
7. **Calendar (Short) Course Description:**
   The course draws on current theories, concepts, and best practices to develop the most suitable ways to ensure success and continuity for multiple types of family enterprise, including family start-up/business/office/foundation. It will explain what makes family enterprises unique and then focus on how to effectively apply governance in developing a strategy of growth through innovation and entrepreneurship.
8. **Expanded Course Description:**
   The course brings together members of family enterprises that try to improve their knowledge and skills through executive education with Executive MBA students who are involved in family enterprises through ownership, working in a family office, or via private equity or consulting. As growing academic research on family enterprises has shown, family-controlled organizations perform and compete differently. Drawing on current theories and concepts and building on best practices, the course develops the most suitable ways to ensure success and continuity for multiple types of family enterprise, which include family start-ups, family-owned and managed businesses, family offices or foundations. It will start by explaining what makes family enterprises unique and then focus on how to effectively apply governance in developing a strategy of growth through innovation and entrepreneurship.
9. **Course Learning Outcomes:**
   Upon completion of the course, students will be able to:
   - Understand how and why family-owned businesses differ from other types of ownership structures.
   - Successfully apply the strategies and governance tools Identified during the course to a real-world family business.
   - Find the best ways to build relationships and improve functionality within their specific family context.
10. **Rationale:**
    In the US, 35% of Fortune 1000 are family firms, and in most countries outside the US, family businesses are even more dominant. By some estimates, the amount of family office capital deployed globally is approaching that of private equity at approximately $13 trillion. Family capital and involvement is also of significant importance in start-ups, with an estimated 40% of successful entrepreneurial ventures eventually becoming family

businesses. And there is a growing interest by private equity and wealth management in family businesses, while leading consulting firms and other professional service providers have developed family business, family office and family philanthropy practice areas. This means that quite a number of our students (or alumni) are directly or indirectly involved in family enterprise (including their own start-up) and should therefore have an interest in this intensive double course.

11. Evaluation:

All assignments for this course are individual. They include class attendance and participation (20%), the results of five reflections or group discussions to be posted daily on the Canvas discussion board (for a total of 20%), and an individual Generational Growth Project for their specific family enterprise context that needs to be developed gradually throughout the course and submitted afterwards (60%).

12. Integrated Courses:

NOT integrated

13. Crosslisted Courses:

NOT crosslisted

14. Faculty Resources:

This course is being offered as an elective to all students from the Kellogg EMBA global network during the Winter term at the Miami campus of the Kellogg School of Management of Northwestern University. It will be taught by Matt Allen, who is the John L. Ward Clinical Professor of Family Enterprises and Executive Director of the Ward Center for Family Enterprises. His research addresses how families learn, how to prepare the next generation for their individual roles in the family business, and how family members can be more entrepreneurial individually and as a family. It has been published in top academic and practitioner outlets.

15. Physical Resources:

Classes for this course will start with one online session and will then be held in person over five intensive days at the Miami campus of the Kellogg Executive MBA program, which will provide all the necessary physical resources.

16. Bibliography and Library Statement:

All required course material will be made available to participating students through Kellogg's Learning Management System (Canvas) to which they will be given access before, during and after the course, as needed. If necessary, our students can access additional relevant material via the York University Library, as per the attached Library Statement.

MEMORANDUM

York University Libraries

To: Matthias Kipping

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

Date: September 23, 2026

Subject: Library Statement of Support – Governing for Generational Growth (EMBA 6036)

Summary

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

Collections

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

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

- Entrepreneurship, Family-owned business enterprises, Strategic planning, Corporate governance and Venture capital etc .

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

However, the Omni single-search interface provides students with access to a wide range of remote materials, including eBooks, book chapters, articles, dissertations, streaming media, etc. that students may wish to

consult, especially when completing the major individual project for the course. Library users may also request items from partner libraries through Omni.

A selection of additional electronic collections of particular interest to this course and assignments that form a part of it are highlighted below, and a complete listing of databases is available on the Business Databases A-Z webpage

Business Articles & Newspaper Collections:

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

eBook Platforms:

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

Services

Library Instruction

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

Research Guides & eLearning Modules of Interest:

- EMBA Program: Self-Paced Library Research Module
- Business Citation Guide
- Business Articles Guide
- Business Plans 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.

COURSE SYLLABUS
Governing For Generational Growth
2027 STRTX-447-0
Professor Matt Allen
Feb 16(online) & 22-26 (in person Miami) 2027

Overview:

This course represents a unique opportunity for EMBA students. For the first time that we are aware of, EMBA students are invited to participate in an executive education program for credit. EMBA students will participate in this program alongside other families who have registered as executive education participants. There are several unique benefits that come with this combined structure with executive education. They are:

- Multiple Faculty: Though Professor Allen will lead this course and provide grading and guidance from the student perspective, participating students will have the opportunity to learn from multiple faculty who will be teaching in the course.
- Learn With Your Family: Family enterprises are unique and as a result, the ideal learning approach is also unique. Research at the Ward Center has demonstrated that deep learning within family enterprises is enhanced when multiple family members participate together. Because of this, EMBA students are strongly encouraged to invite at least one (preferably more) family member to participate in the program with them. This allows you to better integrate the learning in and across the family.
- Learning from Other Families: One of the primary benefits of executive education is the ability to learn from other participants. This program will be no different. EMBA students will have the opportunity to learn from other EMBA students from family enterprises along with their invited family members as well as from the other families participating in the program as executive education participants. This will provide a rich diversity of experiences and approaches to applying the content.

Learning Objectives:

1. Learn from current research and industry best practices regarding best practices for family enterprise (family business, office, startup or foundation) continuity and success through effective governance
2. Use the strategy of growth through innovation / entrepreneurship as a vehicle for understanding how to apply governance concepts in a strategic way
3. Apply these current theories, concepts and best practices to a real-world family business context that is meaningful to you (your own family enterprise or other relevant context)
4. Strengthen your relationship with your own family and build family functionality.
5. Understand how and why family-owned businesses differ from other types of ownership structures.

Background:

- 35% of U.S. Fortune 1000 are family firms -- in most countries outside the US, family businesses are even more dominant.
- By some estimates, the amount of family office capital deployed globally is approaching that of deployed private equity at approximately $13T.
- Approximately 76% of global startups involve multiple family members in management, ownership or both. Approximately 85% of global startups receive at least some funding from family. Approximately 40% of successful entrepreneurial ventures eventually become family businesses.
- Family involvement through direct investing activities (private equity, real estate, etc.) has grown rapidly as families seek other ways to diversify and grow.
- Private equity and wealth management interest in family businesses and family offices is increasing rapidly.

- Leading consulting firms and other professional service providers have developed family business, family office and family philanthropy practice areas.
- Academic interest in the study of family enterprises, and the rigor of associated research, has escalated over the past decade.
- Family controlled organizations perform and compete differently.

Primary Audience:

- Students who have a family enterprise in their family (does not matter if you are interested in working for the business or not or where that business is in the process from startup to multi-generation).
- Students from families who invest together and/or pursue philanthropy together.
- Students who work for a family enterprise (family business, office, foundation or startup)

COURSE EVALUATION

Grading for the course is as follows:

In class attendance and participation	**20%**
Daily Reflection/Small Group Discussions	**20%**
Generational Growth Project (6 parts)	**60%**

GRADED ASSIGNMENTS

In-Class Attendance and Participation (20%)

Your participation grade will consist of a combination of your in-classroom participation in discussions and activities as well as your full and on-time attendance in both the online virtual session and the in-person session days.

Daily Reflection or Small Group Discussions (20%)

Each of the 5 in-person meetings will include either a daily reflection or a small group discussion depending on the day. The reflections will require short write-up of a personal reflection on something that was discussed during the day. Reflections will be turned in as part of a discussion board on Canvas. Be sure to follow the instructions for length, format and content. Small group discussions will involve you meeting with your assigned small group of students to discuss a question or questions related to the content from that day. Similar to daily reflections, small group discussions will also be turned in as part of a discussion board on Canvas with the difference being that there will be only one discussion per small group rather than individual discussion posts. Again, be sure to follow the instructions for the length, format and content. Each daily reflection or small group discussion will be worth 4 points.

Generational Growth Project (60%)

The primary grading for this course will be based on your completion of a Generational Growth Project. This generational growth project is an opportunity for you to apply the governance concepts used in the course to a growth project in your own family enterprise or the enterprise that you are associated with. Rather than a full project due at the end of the program, a portion of the growth project will be completed at the end of each session. The purpose of this approach is twofold: first, to allow you to apply the days learning immediately and second,

to allow you to pivot or adapt your growth project idea as the course progresses. The growth project assignments will follow the flow of the course as follows:

Part 1- Defining your growth project. This assignment will involve you working directly with your family to define 3 possible growth opportunities, analyze those opportunities and choose the one that you intend to address through the rest of the course. Part one is associated with the online virtual class meeting one week before the in person sessions. See the Canvas assignment for specific details about approach and deliverables

Part 2 – Vision values and purpose. This assignment involves connecting your chosen growth opportunity to the vision values and purpose of both the family and the enterprise. You will apply concepts learned in this day's sessions to make sure that the growth opportunity and purpose of the business and family are aligned. You will work directly with family where possible on this analysis to ensure that the family's vision, not just your vision is applied. See the Canvas assignment for specific details about approach and deliverables.

Part 3 – Structure. For this assignment you will connect family and business governance to the growth opportunity. The sessions on this day will dig into the many ways that families approach governance. In this assignment you will design governance structures to support/cause your growth opportunity to be successful. This will involve demonstrating understanding of good governance as well as identifying needs and approaches that are specific to your family. See the Canvas assignment for specific details about approach and deliverables.

Part 4 – Process – With the structure in place, you can begin to plan for the actual process for implementing your growth strategy. For this assignment you will use what is learned in the sessions to create an implementation plan including appropriate processes to ensure that your governance design is followed while at the same time allowing for sufficient flexibility to adapt to unanticipated changes as you learn. See the canvas assignment for specific details about approach and deliverables.

Part 5 – Friction. All entrepreneurship and growth opportunities will face obstacles. These obstacles can be even more complex when family is involved. For this assignment you will use what is learned in the sessions about possible frictions and the tools for overcoming those frictions to identify and create contingency plans. See the Canvas assignment for specific details about approach and deliverables.

Part 6 – Leadership and Action – All strategies require action and leadership. Without action the idea will remain an idea with no possibility or reaping the potential rewards. Leadership is necessary to organize action in the most effective way possible to get the most out of the resources required to execute on your growth idea. For this assignment you will plan out the immediate steps for executing your growth plan along with an analysis of what your role will be as a leader in this effort. See the Canvas assignment for specific details about approach and deliverables.

COURSE SCHEDULE
(See accompanying daily matrix for specific topics and faculty)

Session 1 – Course Introduction and Overview / Defining your generational growth goals
Tuesday, February 16, 2027 – (Via Zoom) Online Virtual Session: 8am to 11am CT

Readings: TBD – looking to assign the mostly timely reading materials as possible. As a result, readings will be defined as the time for the class approaches.

Assignments

- Complete the introduction and fundamental Dilemmas survey (see Canvas) prior to class start time
- Daily reflection or small group discussion
- Turn in Part 1 of the Generational Growth Project by Midnight

Session 2 – Foundations: Vision, Values and Purpose
Monday, February 22, 2027 – 8:30 am to 6:00pm Miami Campus

Readings: TBD – looking to assign the mostly timely reading materials as possible. As a result, readings will be defined as the time for the class approaches.

Assignments

- Daily reflection or small group discussion
- Turn in Part 2 of the Generational Growth Project by Midnight

Session 3 – Governance Structures
Tuesday, February 23, 2027 – 8:30 am to 6:00pm Miami Campus

Readings: TBD – looking to assign the mostly timely reading materials as possible. As a result, readings will be defined as the time for the class approaches.

Assignments

- Daily reflection or small group discussion
- Turn in Part 3 of the Generational Growth Project by Midnight

Session 4 – Process and Models
Tuesday, February 16, 2027 – 8:30 am to 6:00pm Miami Campus

Readings: TBD – looking to assign the mostly timely reading materials as possible. As a result, readings will be defined as the time for the class approaches.

Assignments

- Daily reflection or small group discussion
- Turn in Part 4 of the Generational Growth Project by Midnight

Session 5 – Friction
Tuesday, February 16, 2027 – 8:30 am to 6:00pm Miami Campus

Readings: TBD – looking to assign the mostly timely reading materials as possible. As a result, readings will be defined as the time for the class approaches.

Assignments

- Daily reflection or small group discussion
- Turn in Part 5 of the Generational Growth Project by Midnight

Session 6 – Action and Leadership
Tuesday, February 16, 2027 – 8:30 am to 12:00pm Miami Campus

Readings: TBD – looking to assign the mostly timely reading materials as possible. As a result, readings will be defined as the time for the class approaches.

Assignments

- Daily reflection or small group discussion
- Turn in Part 6 of the Generational Growth Project by Midnight

COURSE CODE OF CONDUCT

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

OUR FAVORITE FAMILY BUSINESS BOOKS

- **Bacardi and the Long Fight for Cuba**. Gjelten, Tom. New York: Viking, 2008. 480 pages.
- **The Trust: The Private and Powerful Family Behind The New York Times**. Tifft, Susan E. and Alex S. Jones. Boston: Little, Brown and Co., 1999. 870 pages.
- **Katharine Graham: A Personal History.** Graham, Katharine. New York: Random House, 1998. 625 pages.
- **Family Capitalism: Wendels, Haniels, Falcks, and the Continental European Model**. James, Harold. Massachusetts: HBS Press, 2006. 425 pages.
- **The Living Company**, Arie de Geuss, HBS Press, 1997. 240 pages.
- **Samsung Rising, The Inside Story of the Korean Giant that Set out to Beat Apple and Conquer Tech** Geoffrey Cain, Currency, 2019. 383 pages

Please see our website for additional publications.

- https://www.kellogg.northwestern.edu/academics-research/family-business/john-l-ward-center/

Additional Statements and Policies

Schedule and Syllabus Subject to Change
Please note that the specifics of this course syllabus are subject to change in the case of unforeseen circumstances. Instructors will notify students of any changes as soon as possible. Students will be responsible for abiding by the changes.

Academic Integrity
Students in this course are required to comply with the policies found in the booklet, "Academic Integrity at Northwestern University: A Basic Guide". All papers submitted for credit in this course must be submitted electronically unless otherwise instructed by the professor. Your written work may be tested for plagiarized content. For details regarding academic integrity at Northwestern or to download the guide, visit: https://www.northwestern.edu/provost/policies-procedures/academic-integrity/index.html

Accessibility
Northwestern University is committed to providing the most accessible learning environment as possible for students with disabilities. Should you anticipate or experience disability-related barriers in the academic setting, please contact AccessibleNU to move forward with the university's established accommodation process (e: accessiblenu@northwestern.edu; p: 847-467-5530). If you already have established accommodations with AccessibleNU, please let me know as soon as possible, preferably within the first two weeks of the term, so we can work together to implement your disability accommodations. Disability information, including academic accommodations, is confidential under the Family Educational Rights and Privacy Act.

Religious Observance
Northwestern is committed to fostering an academic community respectful and welcoming of persons from all backgrounds. To that end, the policy on academic accommodations for religious holidays stipulates that students will not be penalized for class absences to observe religious holidays. If you will observe a religious holiday during a class meeting, scheduled exam, or assignment deadline, please let me know as soon as possible, preferably within the first two week of class. If exams or assignment deadlines on the syllabus fall on religious holidays you observe, please reach out so that we can discuss that coursework.

Diversity Equity and Inclusion
Instructors are encouraged to consider including a statement about diversity, equity, and inclusion (DEI) in their course syllabi. By including a DEI statement, instructors can help establish a welcoming tone and demonstrate what they value in the learning environment. For more information and examples, go to the Searle Center for Advancing Learning and Teaching's resources on creating inclusive learning environments.

Exceptions to Class Modality
Class sessions for this course will occur in person. Individual students will not be granted permission to attend remotely except as the result of an Americans with Disabilities Act (ADA) accommodation as determined by AccessibleNU.

Prohibition of Recording of Class Sessions by Students
Unauthorized student recording of classroom or other academic activities (including advising sessions or office hours) is prohibited. Unauthorized recording is unethical and may also be a violation of University policy and state law. Students requesting the use of assistive technology as an accommodation should contact AccessibleNU. Unauthorized use of classroom recordings – including distributing or posting them – is also prohibited. Under the University's Copyright Policy, faculty own the copyright to instructional materials – including those resources created specifically for the purposes of instruction, such as syllabi, lectures and lecture notes, and presentations. Students cannot copy, reproduce, display, or distribute these materials. Students who engage in unauthorized recording, unauthorized use of a recording, or unauthorized distribution of instructional materials will be referred to the appropriate University office for follow-up.

Support for Wellness and Mental Health
Northwestern University is committed to supporting the wellness of our students. Student Affairs has multiple resources to support student wellness and mental health. If you are feeling distressed or overwhelmed, please reach out for help. Students can access confidential resources through the Counseling and Psychological Services (CAPS), Religious and Spiritual Life (RSL) and the Center for Awareness, Response and Education (CARE). All Northwestern students are also eligible to access support at no cost though TimelyCare, a virtual mental health platform that provides counseling, health coaching and 24/7 on-demand services.

Additional information on the resources mentioned above can be found here:
https://www.northwestern.edu/counseling/
https://www.northwestern.edu/religious-life/
https://www.northwestern.edu/care/
https://www.northwestern.edu/studentaffairs/timelycare.html

Guidance on Class Recordings
This class or portions of this class may be recorded by the instructor for educational purposes. Your instructor will communicate how members of the class can access the recordings. Portions of the course that contain images, questions or commentary/discussion by students will be edited out of any recordings that are saved beyond the current term.

Course Change Proposal – Leading and Managing Diverse Organizations

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

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

2. **Course Number and Credit Value**
   EMBA 6755 2.00

3. **Course Title**
   a) **Long Course Title**
      Leading and Managing Diverse Organizations

   b) **Short Course Title**
      Managing Diverse Organizations

4. **Existing Pre-requisites/Co-Requisites**

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

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

6. **Effective Session of Proposed Change(s)**
   Fall 2026

7. **Academic Rationale**
   While the course has not been changed significantly, the revised title better reflects the course content and its focus on leadership in the workplace. The current title ("Managing Diverse Organizations") is less reflective of the actual focus on leadership across differences.

8. **Proposed Course Information**

Existing Course Information (Change from)	Proposed Course Information (Change to)
Long Title: *Leading and Managing Diverse Organizations* *Short Title:* *Managing Diverse Organizations*	*Long Title:* *Leadership, Merit, and the Modern Workplace: Leading Across Difference* *Short Title:* *Leading Across Difference*

9. Consultation
N/A

Originator

Signature	Date
Name	Area or Specialization

Approvals:

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

Nicholas Pearce Signature	Date
Nicholas Pearce Name	Kellogg-Schulich Executive MBA Area or Specialization

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

Matthias Kipping Signature	Date

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

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

Kevin Tasa	
Signature	Date

Kevin Tasa	Kellogg-Schulich Executive MBA
Name of Committee Chair	Committee

Required Attachments

- For changes in the number of credits, course title or course description, please attach the Schulich course outline (which must conform to program norms; see the Program Assistant for details).
- For cross-listed / integrated courses, please include a signed statement of agreement from the director of the other graduate course / other degree program.

Send to

Send an electronic copy of all forms and attachments, and forward emails of support from other faculty members , to the appropriate program committee secretary.

Northwestern

Kellogg

School of Management

LEADERSHIP, MERIT, AND THE MODERN WORKPLACE: LEADING ACROSS DIFFERENCE

MORSX 462

SYLLABUS

PROFESSOR NICHOLAS A. PEARCE, PH.D.

@NAPPHD

FALL 2026

Northwestern Kellogg School of Management

DEPARTMENT OF MANAGEMENT & ORGANIZATIONS (MORS)

MORSX 462

LEADERSHIP, MERIT, AND THE MODERN WORKPLACE: LEADING ACROSS DIFFERENCE

Fall 2026 • FIRST CLASS MANDATORY
Tuesdays 8:00 – 11:15 AM CT (online only)

PROFESSOR:

Nicholas A. Pearce, Ph.D. (@napphd)
n-pearce@kellogg.northwestern.edu
Office hours: Available by appointment (booking@nicholaspearce.org)
Lead Graduate Assistant: Rachael MacLean (racmmacl@gmail.com)

COURSE DESCRIPTION

Workplaces are becoming more complex, not less. The leaders who will thrive are those who can navigate difference with skill, build trust across lines of culture and perspective, and create organizations where excellence and opportunity complement – not compete with – one another.

This five-session course gives students a practical, research-based foundation for leading effectively in today's global workplace. Through case studies, simulations, deep dialogue, and personal reflection, students will examine how to lead across difference with competence, courage, and care – and how to build high-performing teams and organizations where merit is clearly defined, fairly assessed, and consistently rewarded.

COURSE FORMAT & ATTENDANCE POLICY

In each session, we will focus on a different dimension of the insight and expertise needed to lead across difference in these times, starting with an understanding of true meritocracy and then moving along a journey from exploring the diversity we *each* bring to the table and scaling up to the level of teams, organizations, markets, and society. This course is built on the philosophy that we learn from one another – consequently, there will be a strong emphasis on actively engaging in self-reflection, discussing assigned readings and real-world scenarios, sharing experiences, and participating in experiential learning exercises.

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

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

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

OFFICE HOURS

One of my favorite privileges as one of your professors is to be available beyond our class time to support your learning and development outside of the classroom. I will be happy to meet with you (as individuals or small groups) each Tuesday immediately after class via Zoom. Beyond the duration of our course, I am delighted to stay connected with you via e-mail and social media.

COURSE MATERIALS

All assigned readings can be found either in the Study.net course reader or on our Canvas course page. We have split the readings in this way to save on course reader costs for you. **Readings that are in the Study.net course reader are denoted (SN), readings available for immediate download on our Canvas site are denoted (C), and bonus readings that have been curated for you to independently access have been denoted (BR)**. Personally inscribed copies of Professor Pearce's book, *The Purpose Path*, are available upon request.

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

- *What* are the key concepts/principles?
- *So what*? How and why does this matter for leaders? For organizations? For society?
- *Now what*? How can I apply these insights on my leadership journey?

RECORDINGS & COURSE MATERIALS POLICY

It is a Kellogg Honor Code Violation to video or audio record class lectures, class materials, office hour visits, or other course-related information or to acquire recorded course information for private use or public posting. In addition, NU policy states that students are prohibited from recording class sessions. Students are expressly prohibited from copying or distributing class recordings or any class materials. Unauthorized student recording of classroom or other academic activities (including advising sessions or office hours) is prohibited. Unauthorized recording is unethical and violates University policy and laws. Students requesting the use of assistive technology as an accommodation should contact AccessibleNU. Unauthorized use of classroom recordings – including distributing or posting them – is prohibited. Under the University's Copyright Policy, faculty own the copyright to instructional materials – including those resources created specifically for instructional purposes, such as syllabi, lectures/lecture notes, and presentations. Students cannot copy, reproduce, display, or distribute these materials. Students who engage in unauthorized recording, unauthorized use of a recording, or unauthorized use or distribution of instructional materials will be penalized. We also ask that you not sabotage your classmates' learning experiences by sharing confidential role information before/during/after cases/exercises or communicating outside of your section regarding your experience with course cases/exercises.

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EVALUATION

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

CLASS CITIZENSHIP (20%) – Each class session will begin promptly at the start time – your on-time attendance, full preparedness, and active engagement throughout will be expected and appreciated. In each session, you should be prepared to discuss the readings and/or case(s), share your ideas, and thoughtfully interpret & engage with the insights and issues presented by others. Your on-time arrival to all class sessions and the consistency & quality of your contributions are vital to everyone's learning experience and will factor into the evaluation of your performance in this class.

In a class like this, it is not always possible to call on every person who would like to speak. If you have a question for which we may not have sufficient in-class time that you would like to discuss further, you can always reach out to the teaching team. However, when you are called upon, your contribution to class discussions will be evaluated more by the *quality* of your comments than their sheer *quantity*. Quality comments often possess one or more of the following:

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

REFLECTION ESSAYS (45%) – An important objective of this class is to bridge the gap between theory and practice. Translating insight into action is not always easy, but it is essential for effective leadership. To facilitate this, you will be asked to complete three reflection essays. These individually-authored essays will be of 1-2 pages in length (12-pt. font size, double-spacing, and 1" margins) and will invite you to reflect on the readings and in-class discussion of the previous class session by sharing your key takeaways, "aha" moments, as well as your thoughts on how you can apply these lessons to your practice of leadership. These short essays will be graded on a check-plus, check, check-minus basis. Outstanding essays will go beyond a simple restatement of the in-class highlights/summary of readings to demonstrate a nuanced synthesis of the ideas and a thoughtful explanation of how they can/will be applied to your life and leadership. An additional benefit of these assignments is that they will help you to reflect upon, internalize, and deepen your understanding of key course concepts and how to apply them as you prepare for your final course deliverables.

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

- Reflection Essay #1 (*based on Session 1*): Session 2
- Reflection Essay #2 (*based on Session 2*): Session 3
- Reflection Essay #3 (*based on Session 3*): Session 4

MULTICULTURAL HUMAN FLOURISHING CAPSTONE PROJECT (35%) – This final project offers an opportunity for you to collaborate with a small team of classmates to thoroughly investigate the impact of the current sociopolitical climate on a culturally distinct demographic subculture within the broader context of society and steps that managers might take to ensure their flourishing in the workplace and marketplace.

Your team must choose a demographic that is not represented in your group. Utilizing the concepts learned in the course and additional research your team conducts, your analysis should inform us about what is necessary to effectively engage with individuals in the subculture, including key considerations for attracting, retaining & advancing talent in the workplace, collaborating with people in a cross-culturally competent manner, as well as penetrating the markets represented by the subculture. **The final product**

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of your research project will be a 10-minute PowerPoint presentation delivered during the final class session. Each member of your team must be included in the live presentation. The PowerPoint deck must be uploaded to Canvas as a deliverable. Be creative, be sure to cite all sources you use throughout the presentation and include a reference slide at the end of your slide deck.

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

- Sex or Gender: Women, Men, Non-binary or Queer persons
- Race: African-Americans (Blacks), Caucasians (Whites), Latinos, Asians, multiracial people
- Immigrant status (e.g. Green Card, undocumented, full citizen, etc.)
- Sexual orientation: Straight, Gay, Lesbian, Bisexual, Queer people
- People who are solely or primarily responsible for the physical & emotional care of one or more dependents – whether elders or children
- Religion or Creed: Jewish, Muslim, evangelical Christian, Sikh, Amish, etc.
- Age or Generation: Gen Z (Digital Natives), Gen Y (Millennials), Gen X, Baby Boomers
- Military veterans
- Disability status (persons having physical, cognitive, mental, sensory, emotional, or developmental impairments)

Successful projects have followed this general outline:

- First 30-60 seconds: Compelling intro and brief profile of the demographic in your chosen context
- Next 4-5 minutes: Overview of your research on the impact of the current sociopolitical climate on the workforce, workplace, and marketplace flourishing of the target demographic
- Next 4-5 minutes: Recommendations for effective leadership & engagement + Conclusion

Your presentation will be graded on the following four criteria:

- **Depth of analysis**: In-depth research with compelling insights that build a case for the recommendations offered by the team
- **Integration of course content**: Excellent command of related course content (in-class discussions and assigned readings) to support research and recommendations
- **Quality of recommendations**: Interesting, research-aligned, justifiable recommendations offered with a clear understanding of the implications and possible alternatives
- **Professionalism and stickiness**: Well-organized and logical flow with clear thesis; research and recommendations presented in an engaging, memorable manner with appropriate grammar, spelling, punctuation, and formatting, *and* following timing and narration guidelines

Note**:** *Each team must select a different demographic subculture, so you will want to have your plan approved by the teaching team as soon as possible.*

In your analysis, you might consider addressing some of the following questions:

- What are some of the demographic shifts on the horizon within this subculture? How might these shifts inform and influence workplace and marketplace diversity & inclusion strategy?
- What are common experiences people from this subculture have doing business within Corporate America/with United States-based businesses? In the global marketplace?
- What are some of the common stereotypes of people from this subculture? Who holds these stereotypes? How does that impact organizational behavior and business outcomes?
- How would you describe this subculture using the 8 Dimensions of Culture framework? What insights does your assessment give you as someone who might potentially lead/collaborate with individuals from this subculture? What are some of the "dos & don'ts" for collaborating with individuals in this subculture in a cross-culturally competent manner?

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- How does the current anti-DEI climate particularly impact members of this subculture?
- What do individuals from this subculture wish their organizational leaders/managers knew about how to understand, respect, and leverage the uniqueness they bring to the table?
- What should leaders and organizations (both B2B & B2C) do with the insights generated by your team's analysis? How can they implement some of these ideas within their teams & organizations, as well as with their partners and customers/clients?

This final project is a crucial exercise for solidifying the lessons learned throughout the course and establishing a strong foundation for your future endeavors. **Your presentation should be 10 minutes in length. It is due via Canvas upload by the beginning of class during Session 5, which is when you will deliver your presentation live to your classmates.** Be sure to allow sufficient time to submit your assignment, as these files can be large and take a long time to upload over wireless connections or from off-campus locations. Extension requests will not be granted except in the most extreme of circumstances.

In the interest of fairness, you are also asked to submit the evaluation form (at the end of the syllabus) to evaluate the performance of each of your team's members (including yourself).

CONSIDERATIONS FOR OUR CLASS COMMUNITY

The Kellogg Honor Code and Kellogg Code of Etiquette both fully apply to this course and represent our shared set of community expectations and values to promote the optimal learning environment for everyone in our School. Academic dishonesty – including the unauthorized use of generative artificial intelligence – on any submitted work will be reported to the Dean's Office and may result in a failing grade.

ACCESSIBILITY – I am personally committed to creating the most accessible learning environment possible for students with disabilities. Should you anticipate or experience any disability-related barriers, please contact AccessibleNU (accessiblenu@northwestern.edu or 847-467-5530) to move forward with the University's established accommodation process. If you have already established accommodations with the University, please share the confirmation from AccessibleNU as soon as possible so we can implement those accommodations. This information will be treated confidentially.

ADDITIONAL RESOURCES – Students can find useful resources for safety and security, academic support, and mental and physical health and well-being on the NU help website.

ARTIFICIAL INTELLIGENCE – Per Kellogg policy, AI can only be used within prescribed boundaries. The use of generative AI or AI assistants is permitted only for brainstorming your approach to an assignment, outlining your thoughts, formatting, and proofreading; ***not*** answering quiz/exam questions, writing assignments for you, manufacturing personalized reflections, or assisting you with in-class exercises. The use of AI is permitted on all assignments except for the final project. In any AI-assisted assignment, you must explicitly reference how you employed AI assistance in a paragraph at the end of the submission.

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Where Are We? Creeds, Deeds, and the Challenge of Meritocracy

Tuesday, September 22

Class 1

Objectives:

- Discuss course learning objectives, classroom values, and student evaluation criteria
- Explore the contemporary dynamics and lexicon related to navigating across lines of human difference in the workforce, workplace, marketplace, and society at large
- Learn about the opportunities and challenges of meritocracy in the workplace

Required Reading:

- *We Just Can't Handle Diversity* (Burrell, 2016) (SN)
- *Multicultural Meritocracy* (Gündemir, et al, 2017) (C)

Bonus Reading:

- *Achieving Meritocracy in the Workplace* (Castilla, 2016) (BR)
- *How to Show White Men That Diversity and Inclusion Efforts Need Them* (Zheng, 2019) (BR)
- *Meritocracy: From Myth to Reality* (Kaplan, 2015) (BR)
- *The Case for Improving Work for People with Disabilities Goes Way Beyond Compliance* (Sherbin & Taylor Kennedy, 2017) (BR)
- *Autism Doesn't Hold People Back at Work. Discrimination Does.* (Praslova & Praslova, 2021) (BR)
- *Why Companies Should Add Class to Their Diversity Discussions* (Williams, et al., 2018) (BR)
- *Women Rising: The Unseen Barriers* (Ibarra et al., 2013) (BR)
- *The Transatlantic Slave Trade* (Equal Justice Initiative, 2023) (C)
- *African-American Inequality in the United States* (Hammond, et al., 2020) (C)



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Who Are We? Exploring the Power of Authenticity

Tuesday, September 29

Session 2

DUE TODAY: Diversity Reflection Essay #1

Objectives:

- Understand the complex interplay between social identity and self-presentation for leaders
- Explore and experience the power of authenticity in facilitating belonging and flourishing

Required Reading:

- *Diversity & Authenticity* (Phillips, Dumas & Rothbard, 2018) (SN)
- *Fear of Being Different Stifles Talent* (Yoshino & Smith, 2014) (SN)
- **CASE**: *Is a Promotion Worth Hiding Who You Are?* (Ramanna, 2015) (SN)

Bonus Reading:

- *How Diversity Makes Us Smarter* (Phillips, 2014) (C)
- *How Much of Your "Authentic Self" Should You Really Bring to Work?* (McPherson, 2021) (BR)
- *The Authenticity Trap for Workers Who Are Not Straight, White Men* (Hewlett, 2014) (BR)
- *The Upsides of Disclosing Your Religion, Sexual Orientation, or Parental Status at Work* (Ahmad, Sabat & King, 2018) (BR)
- *How to Make Room in Your Work Life for the Rest of Your Self* (Barker Caza, et al., 2018) (BR)



Who Are They? Developing Cross-Cultural Agility

Tuesday, October 6

Class 3

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

Objectives:

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

Required Reading:

- *Building Better Global Managers* (Rifkin, 2006) (SN)
- *Navigating the Cultural Minefield* (Meyer, 2014) (SN)

Bonus Reading:

- *The Power of Small Acts of Inclusion* (Muragishi, Aguilar, Carr & Walton, 2024) (BR)
- *Voices from the Front Lines* (Minguet et al., 2014) (BR)
- *Lost in Translation* (Trompenaars & Woolliams, 2011) (BR)
- *How Multinationals Can Help Advance LGBT Inclusion Around the World* (Glasgow & Twaronite, 2019) (BR)
- *The Intercultural Development Inventory* (Hammer, 2009) (C)



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How Do We Fix It? The Organizational Architecture of Meritocracy

Tuesday, October 13

Class 4

DUE TODAY: Diversity Reflection Essay #3

Objectives:

- Learn about the strategic approaches that organizations use to leverage human differences as sources of sustainable competitive advantage
- Understand the impact of inclusive and equitable organizational design on firm strategy, organizational performance, and market leadership

Required Reading:

- *Designing a Bias-Free Organization* (Bohnet & Morse, 2016) (SN)
- *How Integrating DEI into Strategy Lifts Performance* (Roberson, 2024) (SN)
- **CASE:** *New Baby, Old Paternity Leave Policy* (Saha, Kushwaha & Pathak, 2024) (SN)

Bonus Reading/Listening:

- *3 Essential Strategies for Business Leaders to Combat the War on DEI* (Pearce, 2024) (BR)
- *The Five Stages of DEI Maturity* (Washington, 2020) (BR)
- *7 Metrics to Measure Your Organization's DEI Progress* (Jourdan, 2023) (BR)
- *Why Diversity Programs Fail* (Dobbin & Kalev, 2016) (BR)
- *Diversity as Strategy* (Thomas, 2004) (BR)
- *The Business Case for More Diversity* (Holger, 2019) (C)



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Where Is the Finish Line? Leading for Justice in an Anti-DEI Age

Tuesday, October 27

Class 5

DUE TODAY: Multicultural Human Flourishing Capstone Project

Objectives:

- Learn about the current state of the practice from current executives
- Synthesize key learnings from the course & plan action steps for continuing development
- Discuss how to advance the work of justice & equal opportunity in the workplace & society

Required Reading:

- *What Trump's Second Term Could Mean for DEI* (Yoshino, Glasgow & Joseph, 2024) (SN)
- *Move Beyond the Business Case for Diversity* (Morgan Roberts, 2020) (C)
- **CASE:** *Martin Luther King, Jr.: A Young Minister Confronts the Challenges of Montgomery* (George, Buhrman & McLean, 2005) (SN)

Bonus Reading/Listening:

- *Letter from a Birmingham Jail* (King, 1963) (C)
- *We're Entering the Age of Corporate Social Justice* (Zheng, 2020) (BR)
- *Defining Racism Safely: The Role of Self-Image Maintenance on White Americans' Conceptions of Racism* (Unzueta & Lowery, 2008) (C)
- *Great Leaders Who Make the Mix Work* (Groysberg & Connolly, 2013) (BR)
- *The Purpose Path: A Guide to Pursuing Your Authentic Life's Work* (Pearce, 2019) (book)



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About Dr. Nicholas A. Pearce



Dr. Nicholas A. Pearce is a Chicago native and vocational multi-hyphenate committed to creating social impact at the intersection of the academy, the marketplace, and the church. An award-winning organizational behaviorist, trusted executive adviser, and visionary faith leader, Dr. Pearce serves as a Clinical Professor of Management & Organizations at the Northwestern University Kellogg School of Management, the founding Chief Executive Officer of The Vocati Group, a boutique global management consultancy, and the founding Senior Pastor of Crosstown Community Church in Chicago. He is a celebrated TEDx speaker and the bestselling author of *The Purpose Path: A Guide to Pursuing Your Authentic Life's Work* (St. Martin's Press).

Dr. Pearce is an acclaimed public scholar, keynote speaker, and management educator with expertise in purpose-driven leadership, organizational culture, negotiation strategy, and the dynamics of multicultural meritocracy. Through his work at Northwestern-Kellogg and The Vocati Group, Dr. Pearce has been privileged to serve leaders in over 200 of the world's most prolific corporations, social impact organizations, communities of faith, educational institutions, and government agencies. He and his work have been featured in notable global media outlets, including ABC News, BBC, *Bloomberg Businessweek*, CBS Evening News, *Christianity Today,* CNN, *Crain's Chicago Business*, *Forbes*, *Fortune*, *Harvard Business Review*, NBC News, *New York Times*, NPR, Univision, *UrbanFaith.com*, *Wall Street Journal*, and *Washington Post*.

Celebrated for his leadership and scholarship, Dr. Pearce is a 2025 recipient of the Surge Institute's Pioneer Award and a 2021 recipient of The Aspen Institute's *Ideas Worth Teaching* Award. He has also been named Kellogg's MSMS Professor of the Year, a Galbraith Scholar by Harvard University's Kennedy School of Government, a Public Voices Fellow by The OpEd Project, a Harvey Fellow by the Mustard Seed Foundation, a Fitzhugh Fellow by the National Black MBA Association, one of Chicago's *40 Game Changers (under 40)* by WVON/Ariel Investments, and one of *Today's Joshuas* by *The Christian Outlook*.

As part of his commitment to promoting human flourishing and community wellbeing, Dr. Pearce serves as a trustee of the Greater Chicago Food Depository, Chicago Children's Museum, the Field Foundation, and Fuller Theological Seminary. Active in the civic life of his city, Dr. Pearce has been a member of the Economic Club of Chicago since 2024 and a Leadership Greater Chicago Fellow since 2015. His previous board service includes McCormick Theological Seminary, Access Community Health Network, Chicago Community Trust African American Legacy Fund, Harvey Fellows Program, and Seminary Co-Op Bookstores.

Dr. Pearce holds M.S. and Ph.D. degrees from the Kellogg School of Management at Northwestern University, the M.A. in Theology from Fuller Theological Seminary, and the S.B. in Chemical Engineering & Management from Massachusetts Institute of Technology, with a concentration in Religious Studies earned in conjunction with Harvard Divinity School.

He resides in his hometown with his family.

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TEAM EVALUATION

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

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

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

Do not forget to include yourself!

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

Team Member Name	Quality of Contribution	Dependability	Leadership

Schulich
School of Business
York University

Memorandum

To: Faculty Council
From: Kevin Tasa & Matthias Kipping
Date: 10 October 2026
Subject: Committee Work Plan for 2026-27

In addition to conducting routine matters, such as approving new courses taken by our students at the partner schools within the Kellogg EMBA Global Network, or deciding on petitions, including requests for extensions to a Leave of Absence, the committee will:

1. Continue to monitor (a) the guidelines provided by professors regarding the application of AI by students and how they have shaped its uses and impacted the courses, (b) the success of various approaches to make sure that the students' knowledge and progress can be measured independent of AI.
2. Further refine the measurements of the learning outcomes required for AACSB accreditation and develop internal metrics for assessing the quality of the overall academic experience as part of renewed mid- and end-of-program evaluations. (The latter was planned for 2025-26; but had to be postponed due to other priorities in the program).
3. Assess the success of the Innovating for Social Impact (ISI) capstone courses in Costa Rica and Tanzania, now that both locations are based on projects with co-operatives.
4. Discuss our plans regarding the celebration of the program's 25th anniversary in terms of its academic portion (e.g., possible contents for the planned "Day of Learning").

FACULTY COUNCIL
SCHULICH SCHOOL OF BUSINESS

A regular meeting of the Schulich Faculty Council for the 2026-27 academic year was held via Zoom on **Friday, October 9, 2026** from **11:30am – 1:00 pm**.

MINUTES

In Attendance:

Chair: W. Shen
Vice-Chair: K. Kanagaretnam
Secretary: K. Doyle
Assistant: L. Da Silva

Voting Members of Faculty Council Present:

Senior Admin	D. Zwick, A. Joshi, M. Levesque, T. Noseworthy, K. Tasa, L. Zhu
ACTG	M. Bamber, C. Graham, A. Mawani, X. Su, L. Thorne, V. Trivedi
ARTM	
ECON	A. Coutts, I. Henriques
ENTR	
FINE	K-H. Bae, M. Dong, P. Foroughi, M. Kamstra, Y. Larkin, M. Milevsky, L. Ng, A. Rzeznik, P.
MKTG	E. Fischer, E. Veresiu
MREI	L. Rolheiser
ORGS	I. Hideg, R. Shao
OMIS	I. Bicer, M. Biehl, A. Diamant, D. Elsner, D. Johnston, H. Kim, G. Li, H. Turesson
PLCY	A. Madhok, A. Majzoubi, T. Peridis, W. Sheremata, O. Weber
PROP	
SUST	C. Cho, G. Kistruck, M. Valente
Voting CPM's & Director of 60	M. Cernea, I. Holzinger, X. Li (Lib. Rep., L. Pan
Student Reps	R. Tarakji (GBC), S. Shelar (GBC), P. Povorozniuk (UBS), K. Malik (UBS)

Voting Members of Faculty Council Absent:

M. Annisette	Y. Deutsch	R. Irving (ret.)	G. Morgan (ret.)	G. Saxton
P. Aulakh	G. Dhindsa	R. Karambayya (ret.)	H. Natalia (UBS)	A.J. Sirsi
E. Auster	V. Dhingra	A. Kecskes	D. Neu	J. Tan
R. Belk	D. Dimick (ret.)	M. Kipping	C. Oliver (ret.)	Y. Tian
C. Bell	B. Eberlein	M. Kristal	D. Oppong-Tawiah	P. Torkashvand (UBS
A. Bhanich-Supapol	D. Elsner	F. Lazar	G. Packard	M. Voronov
A. Campbell	J. Everett	A. Liann (Lib. Rep.)	Y. Pan	S. Weiss
M. Cao	M. Farjoun	B. Lyons	R. Phillips	T. Wesson (ret.)
J. Clayton	B. Gainer (ret.)	I. Macdonald (ret.)	E. Prisman	E. Westney (ret.)
W. Cook (ret.)	M. Giesler	D. Matten	A. Rahaman	L. Wright (ret.)
P. Darke	D. Horvath (ret.)	J. McKellar	M. Rice	J.S. Yeomans
J. Darroch	S. Hsu	R. McLean	H. Rosin (ret.)	J. Yeung Do
A. DeCarufel (ret.)	R. Imanirad	C. McMillan	P. Sadorsky	J. Zemans (ret.)

Non-Voting Members of Faculty Council Present:

E. Arias	B. Gallagher	L. Lakats	C. Sicoli
K. Butzek-Morris	J. Gordon	P. Macdonald	N. Sutherland
S. Calahan	C. Hendriks	G. Milavsky	A. Tomizza
D. Fricker	G. Jajjo	N. Narcisi	M. Webber
A. Ferreira	B. Kha	C. Niederwanger	F. Zandi
A. Fisher	H. Koren-Cohen	J. Pinto	C. Zhuang

Guests:

L. Bay-Cheng	M. De Luca (ExecEd)	N. Kishinchandani	V. Nallathamby
S. Xiao	J. Yeung Do		

Non-Voting Members of Faculty Council Absent:

N. Alexandrian	A. Garber	N. Machado	G. Pau	T. Tolias
S. Babra	S. Gargaro	D. Mak	P. Pivato	A. Visram
D. Barret	C. Gray	J. Mapa	J. Pokrajac	A. Volodina
C. Carder	J. Guo	Y. Massop	S. Pulver	P. Walker
J.M. Clark	A. Harris	R. Mayer	C. Sachs	M. Waxman
M. De Luca	C. Hui	T. McQueen	G. Sanchez Cuevas	A. Welsh
L. De Wilde	V. Ivankine	T. Medcof	V. Shanmuganathan	M. Zelver
G. Deans	K. Kim	M. Morriello	A. Sriharan	
K. Elliot	A. Konson	K.R. Na	T. Stubbs	
J. Fayt	S. Lee	Z. Necas	A. Thomson	
S. Friedman	D. Lennox	B. Pasquali	S. Thomas	

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

W. Shen calls meeting to order at 11:32 am and reads the Indigenous Land Acknowledgement.

2. **Motion: Transfer of Summer Authority from the Executive Committee to Council**

C. Graham/M. Levesque.
Chair calls the question.
Motion carries.

3. **GBC, PhD Student Remarks** (10 minutes)

P. Povorozniuk and K. Malik provide an update on UBS activities. UBS hosted Schulympics and received lots of positive feedback. Second year portfolio hosted wellness week at Schulich which included various events such as tabling, karaoke, board games, and writing letters to students' future selves. Pub night is coming up during the fall reading week. UBS completed a food drive with GBC. Elections are coming up for students to choose their representatives.

R. Tarakji introduces himself as Chair of GBC this year and provides an update on coming events by GBC. Pub crawl, planning to host a culture crawl next month in collaboration with UBS.

4. **Motion: Major Modification to the BBA (Markham Campus)** *(K. Tasa)*

Seconded: C. Graham.

K. Tasa provides an overview and some additional context for the initiative.

Members discussed whether there will be opportunities for changes to the delivery mode, teaching approaches, etc. for Markham offerings, accessibility of campus, the potential hidden costs of taking advantage of this opportunity, enrolment logistics regarding electives, total number of intake for 2027, ensuring same caliber between cohorts in first and second years, possibility of adding more summer courses to support the increase in size of cohort.

Speaker's list ends. Chair calls the question. Motion carries.

5. **University Budget Consultation** (40 minutes) (L. Bay-Cheng & N. Kischinchandani)

S. Xiao and J. Yeung-Do attend in support. Provost introduces them and provides an overview of the consultation before moving into the slide deck content and discussion. Slide deck was circulated to Council via email and calendar invitation.

6. **Dean's Remarks and Recruitment Landscape** *(D. Zwick & L. Pan*)

Motion to extend the meeting by 20 minutes.
K. Tasa/M. Biehl
Motion carries

7. **Other Business**

None.

8. Adjournment

Motion to adjourn
K. Tasa/M. Biehl.
Chair adjourns the meeting at 1:23 pm