

**FACULTY COUNCIL
SCHULICH SCHOOL OF BUSINESS**

A meeting of the Schulich Faculty Council for the 2017/2018 academic year will be held on
Friday February 9th 2018 at 11:30am in SSB N108.

AGENDA

		Pages
1.	Welcome & Chair's Remarks	
2.	Enquiries & Communications	
	a) For Information: Senate Synopsis (2018.01.25)	2-5
3.	Dean's Remarks	
4.	PhD/GBC/UBS Initiatives	
5.	BBA/iBBA Program Committee	
	a) Motion: Rename the Certificate in Managing International Trade and Investment (CMITI) as Certificate in International Management (CIM)	6-13
6.	Decanal Search: Memo re Revised Procedures for Searches for Deans	14-18
7.	Adjournment	

CONSENT AGENDA

A consent agenda item is deemed to be approved unless, prior to the commencement of a meeting, a member of the Council of the Faculty of the Schulich School of Business advises the Chair, James McKellar, of their request to debate it.

		Pages
1.	BBA/iBBA Program Committee	
	a) Curricular Change: MGMT 2040 3.00 – Ethics, Social Responsibility, and Sustainability in Business (<i>title, description</i>)	19-46
2.	EMBA Program Committee	
	a) New Course Proposals:	
	1. EMBA 6015 2.00 – The New Era of Marketing in China	47-52
	2. EMBA 6025 2.00 – Contemporary Issues about Chinese Financial Markets and Institutions	53-60
3.	Master Programs Committee/Programs Coordinating Committee	
	a) Curricular Change:	
	1. ACTG 6160 3.00 – Advanced Financial Accounting (<i>addition of research component</i>)	61-72
	2. MGMT 6300 3.00 – Case Analysis and Presentation Skills (<i>pre-requisites and co- requisite</i>)	73-85
4.	Minutes of the Last Meeting: 2017.12.15	86-90

If you are unable to attend the meeting, kindly send regrets to
Emily Rush at erush@schulich.yorku.ca.

The Senate of York University

Meeting Synopsis

The 640th Meeting of Senate
held on Thursday, January 25, 2018

Remarks

The Chair of Senate, Professor Lesley Beagrie of the Faculty of Health, praised the organizers of Inclusion Day and expressed gratitude for the stimulating discussions involving participants at the event. She reminded Senators that January 31 is Let's Talk Day and encouraged them to help ensure the well-being of all members of the community.

The President of York University, Rhonda Lenton, devoted her remarks to a wide range of subjects including the following:

- the sad passing of Barry and Honey Sherman, true friends of York who funded the research centre bearing their family name
- the auspicious opening of York's two subway stations with its attendant opportunities to further expand connections to the Greater Toronto Area
- the success of a pilot program housed in the Faculty of Liberal Arts & Professional Studies' School of Sociology providing a bridge to university study for youth who have precarious immigration status (for which long-term funding is being sought)
- York's submission of a Canada Research Chair Equity, Diversity and Inclusivity action plan
- the value of collegial participation in consultations leading to approval of the next iteration of York's Strategic Research Plan
- contributions of \$175,000 to the United Way – placing York in the top flight of GTA workplaces -- thanks to a campaign led by Provost Philipps and Dean Sossin and the generosity
- a series of changes to the University Procedures for Decanal Searches responding to collegial input including the possibility of an open (but still confidential) phase in which Faculty Councils will have an opportunity to meet short-listed candidates if they agree to such a forum.

She addressed questions and comments about negotiations between the University and CUPE 3903, and responded to concerns about the connections between the Chamber of Commerce and the Council of Ontario Universities.

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

Senate Committee Member Elections

Senate acclaimed a candidate recommended by Senate Executive to serve on the Appeals Committee. The Executive Committee also reported that Julie Allen had been

The Senate of York University

Meeting Synopsis

elected by e-vote as the contract faculty member of Academic Standards, Curriculum and Pedagogy.

Senate Policy Approval

Senate approved a recommendation of the Academic Standards, Curriculum and Pedagogy Committee to establishment of a *Senate Policy on Academic Accommodations for Students' Religious Observances* effective 1 July 2018. Approval of a separate and expanded policy entailed amendments to the *Senate Policy on Sessional Dates and the Scheduling of Examinations*. ASCP also provided Senate with Guidelines and Procedures to implement the policy.

Approval of Proposals by E-vote in December 2017

The Executive Committee that an e-vote conducted in December 2017 had resulted in approval to establish the following:

Master of Supply Chain Management Degree Type
Master of Supply Chain Management Degree Program
Master of Marketing Degree Type
Master of Marketing Degree Program

Other Approvals

Senate approved recommendations of the Academic Standards, Curriculum and Pedagogy Committee to

- establish an Industry Partnership Stream within the BSc Program in Computer Science, Computer Science and Electrical Engineering, Lassonde
- establish a Certificate of Proficiency in Spanish for Business and Professional Communication, Hispanic Studies, Glendon
- close BA programs in Canadian Studies, Humanities, Liberal Arts and Professional Studies
- close the BA programs in Latin American and Caribbean Studies, Social Science, Liberal Arts and Professional Studies
- close the BA programs in South Asian Studies and the Cross-Disciplinary Certificate in South Asian Studies housed within the Department of Social Science, Liberal Arts & Professional Studies
- change the name of the BA Programs in Children's Studies to Children, Childhood and Youth and amend their degree requirements, Social Science, Liberal Arts & Professional Studies
- change the degree requirements for the MA Program in Applied Linguistics, Graduate Program in Linguistics and Applied Linguistics, Graduate Studies

The Senate of York University

Meeting Synopsis

Major Reports

Under the auspices of the Academic Policy, Planning and Research Committee, Vice-President Academic and Provost Lisa Philipps and Vice-President Finance and Administration Carol McAulay reported on the budget context for academic planning. The report is accessible from the Senate Meeting website.

Committee Information Items

Executive

The Executive Committee's information items included the following:

- a final call for expressions of interest in membership on Senate committees and other positions elected by Senate
- approval of members of Senate committees nominated by Faculty Council
- approval of minor amendment to Senate Rules and Procedures to change the title of "College Master" to "College Head" in keeping with the new designation announced in the autumn
- faculty complement planning and future engagement with Senate
- the Committee's response to a request from three Senators for a discussion of searches for senior academic appointees.
- an upcoming informal meeting with members of the Board Executive Committee

Academic Policy, Planning and Research

APPRC advised that Strategic Mandate Agreement 2 had been posted online and that discussions are already underway about the framework for SMA3. The Committee also report on the following items:

- the APPRC and ASCP **Forum of Ideas** to be held on Thursday, February 8, 2018 in the Scott Library Collaboratory from 2:00 to 4:00.
- a substantial November update on Markham Centre planning facilitated by the Provost and Vice-Provost Academic
- the status of the "Tracking Progress Through Indicators" project launched in January 2017 which has reached a stage where, it is hoped, colleagues will assist in an effort to develop "incomparable" metrics and participate in the gathering of information that will depict the full range of research and creative activity
- timelines for the final phases of the Strategic Research Plan renewal led by the Vice-President Research and Innovation
- a preliminary progress report on collegial efforts to plan for the creation of a new Faculty approved in principle by Senate in June

The Senate of York University

Meeting Synopsis

Academic Standards, Curriculum and Pedagogy

In November Senate approved, in principle, changes to the University grading scheme. ASCP furnished details on the status of the initiative along with the steps necessary prior to its recommending full approval of a new framework. ASCP also reported that it had approved minor changes to degree requirements for the following programs:

School of the Arts, Performance, Media and Design

Specialized Honours BFA program in Dance Education

BFA Dance program for Concurrent Education

Choreography / Performance Stream, Specialized Honours BFA, Dance

National Ballet School Teaching Training, Options A and B Honours BFA, Dance

Specialized Honours BFA program in Theatre (Acting)

Faculty of Graduate Studies

MSc program in Biology

Faculty of Liberal Arts & Professional Studies

Professional Certificate in Investment Management

Professional Certificate in Financial Planning

Finance Stream within the Honours Bachelor of Commerce

Bachelor of Public Administration

Honours Minor degree option in Business

Rubric of "CCY" for the re-named Children, Childhood & Youth program

Faculty of Science

BA and BSc programs in Applied Mathematics

BSc programs in Mathematical Biology

BA and BSc programs in Math for Education

BA and BSc programs in Pure Math

BA and BSc programs in Statistics

BSc International Dual Degree program in Mathematics and Statistics

Additional Information about this Meeting

Please refer to the full Senate agenda and supplementary material posted online with the January 25, 2018 meeting for details about these items.

<http://secretariat.info.yorku.ca/senate/meeting-agendas-and-synopses/>

February Meeting of Senate

Senate's next meeting is scheduled for 3:00 p.m. on **Thursday, February 15, 2018**

MEMORANDUM

TO: Faculty Council
FROM: Bernard M. Wolf, Director, Certificate in Managing International Trade
And Investment (CMITI)
SUBJECT: Certificate Name Change
DATE: November 21, 2017

MOTION:

Renaming the undergraduate program Certificate from
Managing International Trade and Investment (CMITI)
to *Certificate in International Management (CIM)*

RATIONALE:

Currently, many students who see the title, Certificate in International Trade and Investment (CMITI), think that the emphasis is limited to aspects of international trade and investment. Therefore, they often interpret the Certificate as dealing mostly with economics and finance, whereas the courses and the overall thrust of the Certificate are far more comprehensive and encompass all aspects of international management.

The more accurate title, the Certificate in International Management (CIM), aside from providing greater transparency and a more precise description of the content of the certificate program, is shorter and easier for students to remember. Both factors should encourage greater enrollment.

In addition, changing the certificate name provides clear identification of undergraduates as having expertise in areas of international management study.

While some BBA and iBBA courses were re-sequenced (see appendix for old and new versions), no new courses were added. The re-sequencing will potentially show some existing with new course numbers and titles. There are no changes to the certificate requirements, learning outcomes or assessment associated with the certificate name change and the re-sequencing of

courses and there is no need for accommodation for any student currently enrolled in the program.

There are no additional resource requirements associated with this change.

Certificate in International Management (CIM)

The Schulich School of Business **Certificate in International Management (CIM)** is designed to give graduates in all concentrations a competitive advantage in seeking job opportunities focusing on international business, both at the entry level and later as top executives. ~~Although the CIM title suggests an emphasis on international trade and investment,~~ The courses taken to graduate provide a grounding in all aspects of international business and seek to develop the “global mindset” that is so important in today’s increasingly integrated world. Businesses (large and small) and governments are keen to recruit graduates who take a global view.

CIM focuses on “real life” international business experience. In the capstone course, students make on-site visits to firms which are heavily engaged in international business and interact with leading senior executives who discuss their international experiences. The small group setting encourages students to talk with the executives about career opportunities.

CIM is the first Certificate to be offered to undergraduate Schulich students. Whereas concentrations are not recognized on transcripts, **CIM** is listed on transcripts and students receive a separate diploma at the time of graduation.

Students apply for **CIM** at the point of graduation although they are urged to indicate in third year their intention to graduate with the Certificate via the completion of a **CIM intent form**.



Faculty

Bernard M. Wolf

BA (CUNY); MA & PhD (Yale)
Director, **Certificate in International Management**

Professor Emeritus of Economics

Preet S. Aulakh

BSc & MA (Punjab, India); PhD (Texas-Austin)
Professor of Strategic Management/Policy
Pierre Lassonde Chair in International Business

Anthony D. Baker

HND (Guildford Tech, UK); DIC (Imperial College, UK);

MSc (University of London, UK)

Sessional Lecturer in International Business

Stephen Weiss

BA (Lafayette); MA & PhD (Pennsylvania)
Associate Professor of Strategic Management/Policy and International Business
Director, MBA Program

Tom Wesson

BComm (Queen’s); MBA & PhD (Harvard)
Associate Professor of Strategic Management/Policy and International Business

Lorna Wright

BA (Wilfrid Laurier); MA (Essex, UK);
MIM (Thunderbird); PhD (UWO)
Associate Professor of International Business
Director, Centre for Global Enterprise
EDC Professorship in International Business

Farrokh Zandi

BA (Pahlavi); MA (Lakehead); PhD (Carleton)
Associate Director BBA/iBBA Programs
Sessional Lecturer in Economics
Director, International Business Designation

Mauricio Zelaya

PhD (Waterloo); MA (Ryerson); BComm (University of Toronto)
Sessional Lecturer in International Business

Requirements

To achieve these objectives, the Certificate consists of:

- Required courses
- Choice of elective courses
- Required international **experiential** component

The Certificate requirements for BBA students are larger than the requirements for iBBA students because they lack the international business content of the iBBA program core courses. However, both BBA and iBBA students must take some of the same required Certificate courses.

International Experiential Component

As part of the requirements for the Schulich **Certificate in International Management**, students will be required to engage in an international experiential component. Students in the iBBA Program will satisfy this requirement with their mandatory exchange semester at one of Schulich’s partner business schools.

BBA students can satisfy this requirement by completing an exchange semester at one of Schulich’s partner business schools **or** by completing an international or domestic work placement that offers a strong international learning component (SB/IBUS 4100 3.00). The work placement normally takes place during the summer between the third and fourth year of study.

Eligibility Requirements

To be awarded the Certificate, a student must have a minimum 6.00 (B) cumulative GPA and a minimum 6.00 (B) overall GPA in courses satisfying the certificate. To be eligible for the Work Placement course a minimum overall GPA of 6.00 is required.



Explore the CIM online!
schulich.yorku.ca/cmिति

Certificate Requirements



	BBA students	iBBA students
How do I earn a CIM?	1. Complete all Required Courses 2. Complete the Required International Experiential Component 3. Complete 9.00 credits of Elective Courses*	1. Complete all Required Courses <i>(all INTL courses are already core course requirements in the iBBA program)</i> 2. Complete the Required International Experiential Component 3. Complete 6.00 credits of Elective Courses*
Required Courses	ECON 3510 3.00 Applied International Economics IBUS 3200 3.00 Managing International Business Activities IBUS 4200 3.00 Integrative International Business Seminar OMIS 4560 3.00 Supply Chain Management <i>(or equivalent course taken while on exchange)**</i> ORGS 4400 3.00 Managing Across Cultures	INTL 1300/2300 3.00 Organizational Behaviour Across Cultures INTL 2200 3.00 International Economics IBUS 3200 3.00 Managing International Business Activities <i>(offered in Fall term only)</i> IBUS 4200 3.00 Integrative International Business Seminar <i>(offered in Fall term only)</i> INTL 3000/4000 3.00 Strategic Management for International Business OMIS 4560 3.00 Supply Chain Management**
Required International Experiential Component	One Semester on Exchange OR IBUS 4100 3.00 Work Placement***	One Semester on Exchange
Elective Courses	IBUS 4100 3.00 Work Placement*** IBUS 4500 3.00 Managing Business in Developing Economies FINE 4400 3.00 International Financial Management MGMT 3030 3.00 Creating Global Capitalism MGMT 4300 3.00 Corporate Social Responsibility in a Global Context MKTG 4400 3.00 International Marketing <i>International Business courses taken while on Exchange*</i>	IBUS 4100 3.00 Work Placement*** IBUS 4500 3.00 Managing Business in Developing Economies FINE 4400 3.00 International Financial Management MGMT 3030 3.00 Creating Global Capitalism MGMT 4300 3.00 Corporate Social Responsibility in a Global Context MKTG 4400 3.00 International Marketing <i>International Business courses taken while on Exchange*</i>

* Elective courses may be substituted with equivalent credits of international business courses taken while on exchange. The courses that are substituted need **not** be the same as those listed, but they must have sufficient international business content and be approved in advance.

** This course may be substituted with an equivalent course taken while on exchange **and approved in advance**.

*** If SB/IBUS 4100 3.00 is taken to satisfy the International Experiential Component, the course may **not** also satisfy a **Schulich CIM** elective requirement.

Career Opportunities

CIM graduates have pursued careers in *all* fields (accounting, finance, marketing, managerial economics, operations management and information systems including human resource management, responsible business and strategic management) since almost all business in one way or another involves internationally related activities. Aside from the vast opportunities in Canada, CIM graduates often work abroad for short or long periods of time.



Curriculum Overview Charts

DIRECT ENTRY iBBA (FALL 2014 ENTRY)	
YEAR 1	
FALL TERM	WINTER TERM
Microeconomics for Managers SB/INTL 1200 3.00	Macroeconomics for Managers SB/INTL 1210 3.00
Managing Contemporary Enterprise SB/MGMT 1000 3.00	Organizational Behaviour Across Cultures SB/INTL 1300 3.00
Statistics for Management Decisions or Introduction to Financial Accounting I SB/MGMT 1050 3.00 or SB/ACTG 2010 3.00	Introduction to Financial Accounting I or Statistics for Management Decisions SB/ACTG 2010 3.00 or SB/MGMT 1050 3.00
*Language Study Total of 6.00 credits	
Non-Business Elective(s) or **Globally Focused Study Total of 6.00 credits	
YEAR 2	
FALL TERM	WINTER TERM
Introduction to Financial Accounting II SB/ACTG 2011 3.00	Management Accounting Concepts SB/ACTG 2020 3.00
International Economics SB/INTL 2200 3.00	Introduction to Finance SB/FINE 2000 3.00
Information Systems SB/OMIS 2000 3.00	Marketing Management SB/MKTG 2030 3.00
*Language Study Total of 6.00 credits	
Non-Business Elective(s) or **Globally-Focused Study Total of 6.00 credits	
YEAR 3 and YEAR 4	
FALL TERM	WINTER TERM
***Applied Cross Cultural Management SB/INTL 3350 1.50+	Schulich Electives 24.00 credits (3000 or 4000 level)
***Business & Sustainability SB/INTL 3400 1.50+	
***International Business Ethics SB/INTL 3500 3.00	
***Operations Management SB/OMIS 2010 3.00	
****Strategic Management for International Business SB/INTL 4400 3.00	
*Language Study Total of 6.00 credits	
Non-Business Elective(s) or Schulich Electives Total of 12.00 credits	
Non-Business Elective(s) or **Globally-Focused Study Total of 6.00 credits	

Please note that non-business electives at the 1000 level are acceptable in Years 1 and 2 (i.e. the first 60.00 credits earned towards the iBBA degree). Credit will not be granted for ADMS, HRM, and other courses indicated on the Prohibited Course List.

In Year 3 (i.e. once students have earned 60.00 credits and before earning 90.00 credits), electives, must be 2000 level or higher, except for language and globally-focused study.

In Year 4 (i.e. over 90.00 credits), electives must be 3000 level or higher, except for language and globally-focused courses.

NOTE: Students who are planning on going on exchange in Year 3 must successfully complete all 1st and 2nd year core courses and 12.00 credits of Language Study including Intermediate Level Competency with a minimum grade of C, prior to the Fall term of Year 3. Students who are planning to go on Exchange in Year 3 cannot delay core courses as outlined in the curriculum for the term they are studying at Schulich.

* Students are required to complete 18.00 credits of language study, achieving Advanced Level competency to meet graduation requirements. Year level requirements do not apply.

** Students are required to complete 12.00 credits of Globally-Focused study to meet graduation requirements. Year level requirements do not apply.

*** Recommended for Year 3.

† SB/INTL 3350 1.50 and SB/INTL 3400 1.50 must be taken together in the same term and in the same year. (only offered in the Fall Term).

**** Must be taken in the Fall Term of Year 4 at the Schulich School of Business. Effective Fall 2008, this course cannot be completed on Exchange.

PROPOSED CURRICULUM OVERVIEW	
iBBA (FALL 2016 ENTRY)	
YEAR 1	
FALL TERM	WINTER TERM
Microeconomics for Managers SB/INTL 1200 3.00	Macroeconomics for Managers SB/INTL 1210 3.00
Managing Contemporary Enterprise SB/MGMT 1000 3.00	Business Analytics I SB/MGMT 1050 3.00
Introduction to Financial Accounting I SB/ACTG 2010 3.00	Introduction to Financial Accounting II SB/ACTG 2011 3.00
Marketing Management or Responsible Business in an International Context SB/MKTG 2030 3.00 <u>or</u> SB/INTL 2000 3.00	Marketing Management or Responsible Business in an International Context SB/MKTG 2030 3.00 <u>or</u> SB/INTL 2000 3.00
* Language Study Total of 6.00 credits	
YEAR 2	
FALL TERM	WINTER TERM
Introduction to Finance SB/FINE 2000 3.00	Management Accounting Concepts SB/ACTG 2020 3.00
Organizational Behaviour Across Cultures SB/INTL 1300 3.00	International Economics SB/INTL 2200 3.00
Business Analytics II or Operations Management SB/MGMT 2050 3.00 <u>or</u> SB/OMIS 2010 3.00	Business Analytics II or Operations Management SB/MGMT 2050 3.00 <u>or</u> SB/OMIS 2010 3.00
* Language Study (or Regionally-Focused Elective) Total of 6.00 credits	
* *Regionally-Focused Elective(s) Total of 6.00 credits	
YEAR 3 and YEAR 4	
FALL TERM	WINTER TERM
Strategic Management for International Business SB/INTL 3000 3.00 (proposed course code)	Integrative International Business Simulation SB/INTL 4200 3.00 (proposed course code)
Schulich Electives Total of 24.00 credits	
* Language Study (or Regionally-Focused Elective) Total of 6.00 credits	
* *Regionally-Focused Elective(s) Total of 6.00 credits	
***Non-Business or Schulich Electives Total of 18.00 credits	

* Students have 18.00 credits to satisfy advanced level competency in a preferred language. If a student satisfies advanced language prior to completing 18.00 credits in language, they may use the remaining credits towards learning a second language or additional regionally-focused elective(s).

** Students must complete 12.00 credits of regionally-focused study in addition to the 18.00 credits used for language study to be eligible for graduation. Year level requirement does not apply to language or regionally-focused courses.

*** Year level requirements do not apply to non-business electives. A total of 12.00 credits of non-business electives can be taken at the 1000-level at any time during your degree.

DIRECT ENTRY BBA (FALL 2014 ENTRY)	
YEAR 1	
FALL TERM	WINTER TERM
Introduction to Microeconomics AP/ECON 1000 3.00	Introduction to Macroeconomics AP/ECON 1010 3.00
Managing Contemporary Enterprise SB/MGMT 1000 3.00	Individuals and Groups in Organizations SB/ORGS 1000 3.00
Business History or Ethics, Social Responsibility and Sustainability in Business SB/MGMT 1030 3.00 or SB/MGMT 1040 3.00	Business History or Ethics, Social Responsibility and Sustainability in Business SB/MGMT 1030 3.00 or SB/MGMT 1040 3.00
Statistics for Management Decisions or Introduction to Financial Accounting I SB/MGMT 1050 3.00 or SB/ACTG 2010 3.00	Statistics for Management Decisions or Introduction to Financial Accounting I SB/MGMT 1050 3.00 or SB/ACTG 2010 3.00
Non-Business Elective(s) Total of 6.00 credits	
YEAR 2	
FALL TERM	WINTER TERM
Introduction to Financial Accounting II SB/ACTG 2011 3.00	Management Accounting Concepts SB/ACTG 2020 3.00
Applied Macroeconomics SB/ECON 2000 3.00	Introduction to Finance SB/FINE 2000 3.00
Information Systems SB/OMIS 2000 3.00	Marketing Management SB/MKTG 2030 3.00
Organizations and Their Environments SB/ORGS 2010 3.00	Operations Management SB/OMIS 2010 3.00
Non-Business Elective(s) Total of 6.00 credits	
YEAR 3* and YEAR 4	
Strategic Management SB/SGMT 3000 3.00	*Integrative Business Simulation SB/MGMT 4100 3.00
Schulich Electives Total of 18.00 credits (3000 or 4000 level)	
Schulich Electives or Non-Business Electives Total of 24.00 credits	
Non-Business Electives Total of 12.00 credits	

Please note that non-business electives at the 1000 level are acceptable in Years 1 and 2 (i.e. the first 60.00 credits earned towards the BBA degree). Credit will not be granted for ADMS, HRM and other courses indicated on the Prohibited Course List.

In Year 3 (i.e. once students have earned 60.00 credits and before earning 90.00 credits), electives must be 2000 level or higher.

In Year 4 (i.e. over 90.00 credits), electives must be 3000 level or higher.

* Students who are planning on going on exchange in Year 3 cannot delay core courses as outlined in the curriculum for the term they are studying at Schulich.

** Must be completed in the Fall or Winter term of Year 3. This course cannot be completed on Exchange.

*** This course may be completed in either Year 3 or Year 4. Prerequisite is SB/SGMT 3000 3.00

PROPOSED CURRICULUM OVERVIEW	
BBA (FALL 2016 ENTRY)	
YEAR 1	
FALL TERM	WINTER TERM
Introduction to Microeconomics AP/ECON 1000 3.00	Introduction to Macroeconomics AP/ECON 1010 3.00
Managing Contemporary Enterprise SB/MGMT 1000 3.00	Business Analytics I SB/MGMT 1050 3.00
Introduction to Financial Accounting I SB/ACTG 2010 3.00	Introduction to Financial Accounting II SB/ACTG 2011 3.00
Marketing Management or Ethics, Social Responsibility and Sustainability in Business SB/MKTG 2030 3.00 <u>or</u> SB/MGMT 1040 3.00	Marketing Management or Ethics, Social Responsibility and Sustainability in Business SB/MKTG 2030 3.00 <u>or</u> SB/MGMT 1040 3.00
Non-Business Elective(s) Total of 6.00 credits	
YEAR 2	
FALL TERM	WINTER TERM
Introduction to Finance SB/FINE 2000 3.00	Management Accounting Concepts SB/ACTG 2020 3.00
Individuals and Groups in Organizations SB/ORGS 1000 3.00	Organizations and their Environments SB/ORGS 2010 3.00
Business Analytics II or Operations Management SB/MGMT 2050 3.00 <u>or</u> SB/OMIS 2010 3.00	Business Analytics II or Operations Management SB/MGMT 2050 3.00 <u>or</u> SB/OMIS 2010 3.00
Business History SB/MGMT 1030 3.00	Applied Macroeconomics SB/ECON 2000 3.00
Non-Business Elective(s) Total of 6.00 credits	
YEAR 3 and YEAR 4	
FALL TERM	WINTER TERM
Strategic Management SB/SGMT 3000 3.00	Integrative Business Simulation SB/MGMT 4100 3.00
Schulich Electives Total of 18.00 credits	
Schulich Electives or Non-Business Electives Total of 24.00 credits	
Non-Business Electives* Total of 12.00 credits	

*year level requirements apply

Memorandum

Office of the President

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To: Chairs of Faculty Councils

From: Rhonda L. Lenton, President and Vice-Chancellor
Lisa Philipps, Interim Vice-President Academic and Provost

Date: January 30, 2018

Subject: Revised Procedures for Searches for Deans

Dear colleagues,

We are writing to bring to your attention the attached revised procedures for searches for Deans, to be implemented immediately, including the introduction of a partially “open” search as a pilot for searches being undertaken in 2017-2018 and 2018-2019.

Search procedures for Deans, and recommendations to the Board of Governors of appointments, are within the purview of the President, and the YUFA collective agreement sets out parameters for search committee election and membership for relevant Faculties; no change is being proposed to those parameters.

Within those parameters, the President’s Guidelines for Decanal Searches set out further provisions for the decanal search process. In response to input of colleagues and Faculty Councils undertaking searches in 2017-2018 and 2018-2019 the guidelines have been adjusted as indicated below.

First, we are clarifying the Guidelines in regards to the membership of the search committees, in order to ensure diversity and broad representation across the Faculty (for example, of gender, academic area, and level/nature of experience). The new Guidelines also allow for a slightly increased membership on the Search Committee, in consultation with the President, to accommodate relevant additional representation identified by the Faculty (e.g., contract faculty member, an alumnus). The proposed changes in fact reflect our practices – in collaboration with Faculty Councils - in establishing search committees in the current year, and there will be no change to the membership of those committees.

The second provision being introduced is the potential for an optional “open” stage in the search process, where Faculties choose to incorporate it. It is being introduced as a pilot for searches in 2017-2018 and 2018-2019, and will be



evaluated prior to any extension beyond those years. It is intended to respond to interest, expressed by several Faculty Councils, in allowing a broader spectrum of colleagues in the Faculties to hear presentations from decanal candidates and to provide input to the search committee. At the same time, we are mindful of the importance, in order to attract the best possible candidates, of being known as a University that honours our commitment to keep the identity of candidates confidential, and that treats all candidates fairly and with respect. We are therefore implementing the possibility of a limited open process, i.e., for the top ranked candidates, provided that those candidates are willing to engage in such a process.

We will be in contact shortly with Faculty Councils where searches for Deans are currently under way (i.e., Environmental Studies, Lassonde, Graduate Studies, and Arts, Media, Performance and Design) to determine their interest in incorporating the more open search process into those searches.

York University
Procedures for Decanal Searches
Updated January 2018

Attracting capable Deans is critical to advancing the institutional priorities and mandate of York University. The York Act vests in the President the power to recommend to the Board the appointment of officers of the University (13 (2) d). Under the terms of the current Collective Agreement with YUFA, the importance of collegial participation in the selection of academic administrators and Librarian Administrators is acknowledged in 12.27 (b): *Unless otherwise agreed to between the President and the Faculty Council of the Faculty in question, candidates for appointment as Deans or Principals shall be recommended to the President by search committees established by and advisory to the President, a majority of which have been elected by Faculty Council, and a majority of the members of which are full-time faculty members.*

In light of feedback from the York community and following a review of current practices at other leading Canadian universities, the Procedures for Decanal Searches are being updated, effective immediately.

University Procedures for Decanal Searches

The Deans/Principal play a crucial role in the academic leadership and governance of the university, as well as in the direction and administration of their Faculties and the promotion of teaching and research in those Faculties. It is therefore essential that a decanal search canvas widely to attract candidates who are best qualified for the position in relation to leadership and administrative capacities and experience and scholarly reputation.

The following general procedures shall govern all searches for Faculty Deans, Principal, and, as applicable, the Dean of Libraries. At the outset of a given search, any further specific or supplemental procedures may be agreed upon between the President and the Faculty Council Executive and presented to Faculty Council for approval.

1. The President initiates a search by communication with Faculty Council normally 14 months before the end of the incumbent Dean's/Principal's term, or in the case of an unanticipated vacancy, as soon as possible.
2. Faculty Council normally elects 6 full-time faculty members, one staff and two student members (one undergraduate and one graduate student).
3. Ensuring the best possible outcome will be facilitated by a Search Committee that reflects the breadth and diversity of the Faculty. Each Council should therefore establish procedures reflecting the following principles:
 - a. A Search Committee should have some representation from full-time faculty members with familiarity of the job of Dean – that is, with academic administrative experience – typically no fewer than two colleagues who have been or who are currently chairs or directors of departments, or in non-departmentalized

Faculties, members of the senior administrative team such as previous Associate Deans, UPDs, or GPDs.

- b. Search Committees should broadly reflect the diversity of academic departments including at least one member from each department if possible, and if not, normally no department should have more than one member on the Search Committee; in non-departmentalized faculties, the Committee should broadly reflect the program areas or fields in the Faculty.
 - c. Search Committees should also reflect broadly the gender and demographic diversity of the Faculty.
4. Faculties with a significant proportion of contract faculty or who may desire to have an external member such as an alumnus may request adding an additional member to the Search Committee representing contract faculty, alumnus, etc. (to be agreed upon with the President).
 5. The President appoints one member drawn from outside the Faculty concerned but who is familiar with the Faculty.
 6. The President also names the Chair of the Search Committee, normally the Provost; names a non-voting secretary, normally an experienced senior staff member from outside the Faculty; may retain a Search Consultant to assist the Committee; and formally establishes the Search Committee as a committee advisory to the President, whose mandate is to conduct a search for a new Dean/Principal, in accordance with the agreed-upon procedures, and to recommend to the President, by a specified date, the best-qualified candidate(s) for Dean/Principal.
 7. The Search Committee is responsible for preparing the position profile drawing on input from Faculty Council and in consultation with the President.
 8. The Search Committee will advertise the position in university publications and, if external nominations are being sought, may advertise in national and international professional publications. The Search Committee may also solicit recommendations for the position.
 9. The Search Committee assesses and screens applicants/nominees, and conducts interviews. The names of all the candidates considered at any stage, including the list of those interviewed, shall be kept confidential to the Search Committee and the Consultant. By agreeing to serve on the Committee, all members agree to be bound by these requirements of confidentiality.
 10. The Search Committee prepares its recommendations for the President, identifying the candidate or candidates who present the knowledge, skills and capacities to undertake the responsibilities of Dean/Principal. The Committee may, if it wishes, rank order candidates.
 11. The President consults with the Executive Committee of the Board of Governors which may act on behalf of the Board in appointing the candidate or may recommend the appointment to the Board, at its next regular meeting.
 12. The President announces the name of the new Dean/Principal to the Faculty and the Board of Governors, and subsequently to the wider York community.

Pilot Provision (2017 – 2019) for Open Searches

For Faculties wishing to incorporate an open stage into their search, the following is being provided as a pilot for searches in 2017 - 2018 and 2018 – 2019 to be reviewed before incorporating as a standing option.

Where a Faculty Council indicates a preference for an open search, an open stage may be added to the process after the Search Committee has interviewed its shortlisted candidates confidentially and has identified its top ranked candidates – normally the top two ranked candidates. In order to ensure that York has access to the very best candidates, the Consultant (or if there is no Consultant, the Secretary to the Committee) will ask the top ranked candidates whether they are willing to meet with Faculty Council. That information will be kept in confidence by the Search Consultant (or Secretary).

If both/all the top ranked candidates agree to do so, they will be invited to present to a closed session of Faculty Council. The Search Committee will solicit input from Faculty Council about those candidates and consider this input in their final rankings to be presented to the President. In this event, all members of Faculty Council agree to be bound by the same requirements of confidentiality as the Search Committee. Council members will provide input to the Search Committee but members of Council will be expected to keep the names of the candidates confidential in perpetuity.

If any of the top ranked candidates indicate a requirement for a confidential search, the open stage will not occur for any candidate. The Consultant will report to the Search Committee that at least one candidate requires a confidential search, without disclosing which candidate or candidates have not agreed to meet with Faculty Council. The Search Committee will in any respect consult extensively with Faculty Council about the position profile for the Dean, and provide regular updates throughout the search.

Whether or not the search proceeds to an open stage, the top ranked candidates will also meet with the President, and the Search Committee may elect to hold follow-up interviews with them.

To: Faculty Council, Schulich School of Business
From: Professor Detlev Zwick, BBA/iBBA Program Director
Date: January 15, 2018
Re: SB/MGMT 2040 3.00 Curriculum Changes

Curriculum Change: MGMT 2040 3.00

Rationale:

A major part of the course learning and experience is based on a simulation and the proposed course title and course description make this fact about the course clearer.

Course Change Proposal Template

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

Schulich BBA Program

2. Course Number and Credit Value

SB/MGMT 2040 3.00

3. Course Title

a) Long Course Title

Ethics, Social Responsibility and Sustainability in Business

b) Short Course Title

Ethics, Social Resp. & Sustainability in Bus.

4. Existing Pre-requisites/Co-Requisites

Not open to iBBA students for credit

5. Type of Course Change (indicate all that apply)

	in course number
	in credit value (provide course outline)
x	in course title (provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)
x	in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)
	in learning objectives/outcomes (please append the program's existing learning outcomes as a separate document)
	in integration (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 2018

7. Academic Rationale

A major part of the course learning and experience is based on a simulation and the proposed course title and course description make this fact about the course clearer.

8. Proposed Course Information

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

Existing Course Information (Change from)	Proposed Course Information (Change to)
<p>Long Title: <i>Ethics, Social Responsibility and Sustainability in Business</i></p> <p>Short Title: <i>Ethics, Social Resp&Sustainability in Bus</i></p> <p>Brief Description:</p> <p>This core course introduces students to the role of ethics, corporate social responsibility and sustainability in management. In recent decades, the importance of ethics and social responsibility and sustainable economic development has become increasingly clear both for local and global economies and firms. The purpose of this course is to encourage a basic understanding of why this is the case and what it means for good management in the 21st century. Tools and skills required for the application of these frameworks in all aspects of business will be developed.</p> <p>Note: Not open to iBBA student for credit.</p>	<p>Long Title: <i>Ethics, Social Responsibility and Sustainability: Critical Thinking for Ethical Decision Making – A Simulation Game, Choose-Your-Own-Adventure-Course Ethics.</i></p> <p>Short Title: <i>Ethics, Social Resp&Sustainability in Bus</i></p> <p>Brief Description:</p> <p>This simulation game, choose-your-own-adventure course uses student-centered learning to teach critical thinking and ethical decision-making. The course introduces basic concepts and arguments of business ethics, corporate social responsibility and sustainability. Student-selected issues are analyzed to teach critical thinking skills, practices, techniques, attitudes and principles for evaluating one’s own and others’ ethical reasoning applied to the contemporary demands of business management.</p> <p>Note: Not open to iBBA students for credit.</p>

9. Consultation

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

Originator

Cael Cohen

 Signature

Jan 15, 2018

 Date

Cael Cohen

 Name

SGMT

 Area or Specialization

Approvals:

Area or Specialization

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

James Darroch	Jan 18, 2018
_____ Signature	_____ Date
James Darroch	SGMT
_____ Name	_____ Area or Specialization

Degree Program

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

Detlev Zwick	Jan 19, 2018
_____ Signature	_____ Date
Detlev Zwick	BBA/iBBA Program
_____ Name of Program Director	_____ Program

Program Committee

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

Detlev Zwick	Jan 19, 2018
_____ Signature	_____ Date
Detlev Zwick	BBA/iBBA Program Committee
_____ 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.

Course Outline

Ethics, Social Responsibility and Sustainability: Critical Thinking for Ethical Decision Making – A Simulation Game, Choose-Your-Own-Adventure-Course

Term/Year

Date & Time, beginning on Date

Instructor

Instructor's Name

Phone:

Email:

Office hours:

Assistant

Stephanie Allen

N305A

(416)736-2100 x 66125 (Voicemail)

sallen@schulich.yorku.ca

Brief instructor bio.

Brief Description

This dynamic simulation game, choose-your-own-adventure course uses deep, transformational and student-centered learning to teach critical thinking and ethical decision-making with the aim of introducing students to the basic concepts and arguments concerning business ethics, corporate social responsibility and sustainability. Students work in Learning Teams throughout this unique course. Student-selected issues are analyzed to teach a collection of critical thinking skills, practices, techniques, attitudes and principles that can be used every day to systematically evaluate one's own and others' ethical reasoning applied to the contemporary demands of business management. Students cultivate an approach to ethical disagreements and controversial moral issues using rational standards and mindfulness awareness; critical assessment and formulation of ethical beliefs, arguments, and concepts based on relevant, acceptable and sufficient grounds, rather than passive acceptance.

Prerequisites/Corequisites/Course Exclusions: This course is not available for iBBA credit. Note: Not open to iBBA student for credit.

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Course Learning Outcomes

For detailed Learning Outcomes, see “Learning Objectives,” (pp. 19-23).

Deliverables at a Glance

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

Assignment/Task	Quantity	% Weight	Total %	Author
Module 1 Assignment: Stakeholder Analysis and Defining a Moral Problem.	1	20%	20%	Individual
Module 2 Assignment: Case Analysis.	1	20%	20%	Group
Short, quizzes weekly about the required readings, throughout the course completed in REEF.	10	Pass/Fail	Pass/Fail	Individual
Individual Learning Quests.	3	10%	30%	Individual
Guild Learning Quests.	3	10%	30%	Group
NOTE: No Final Exam.				
			100%	

For details, see “Written Assignments and Learning Quests: Descriptions” (pp. 15-18).

Course Material

REQUIRED READING:

Required reading for this course includes the following book. Every week, you should check the Session-by-Session Syllabus below for readings (see pp. 4-11.)

- Robert W. Sexty. *Ethics, Responsibilities and Sustainability*. McGraw-Hill Ryerson. Second Edition/2011 or Third Edition/2014.

REQUIRED DEVICES:

Required technological devices for this course are: laptop, cell phone or tablet; with ability to access the internet.

REQUIRED ELECTRONIC SUBSCRIPTIONS:

1. **REEF Polling - Free:** its.info.yorku.ca/polling-student

This course uses a Bring Your Own Device to class technology called “REEF Polling,” a mobile-optimized engagement system used to easily create an interactive, deep learning experience. Students respond to questions with any device, receive correct and incorrect answers, and can review session history as a study guide outside of class. REEF Polling is also a hybrid product, allowing students in the same classroom to use their smartphone, tablet, laptop or an i>clicker remote. Students can subscribe to York’s REEF for free. Some assignments need to be submitted to REEF.

2. **EthicsGame - \$85:** www.ethicsgame.com

This course uses EthicsGame, a cloud based site that allows students to develop ethical agility by teaching a method for asking questions and finding answers through interactive, web-based ethics learning tools. Students are required to purchase a four-month subscription at the one-time cost of \$85.00. This fee includes an Ethical Lens Inventory, an ethical typology that helps people identify their preferred ethical lens. The knowledge gained from this inventory allows students to appreciate ethical diversity and learn how to more effectively communicate with others to resolve conflict. The fee also gives students access to Hot Topic Dilemma Simulation Game, online Ethics Exercises, and online resources.

MANDATORY MOODLE COURSE SITE:

This course will be using *Moodle* and can be found at: <https://courses.schulich.yorku.ca>. This course will NOT be using the *Course Materials Database (CMD)* that has been created within Schulich's Lotus Notes. It contains general information for Schulich students, however, does not contain information and materials specific to this course. Students are required to access the *Moodle* course site on a consistent, weekly basis. Some graded assignments need to be submitted to Moodle. Students are urged to download York's free Moodle Mobile App, so that assignment submissions to and access to the Moodle site can be achieved on cell phones and tablets:

https://moodle.yorku.ca/students/documentation/student_moodle_mobile.html

Student Preparation for Class and Class Participation: Expectations

Expanded Course Description:

This 12-week, cumulative skills-based course blends theory and practice across three core modules consisting of three class sessions each.

Orientation and Foundations: Sessions 1, 2 and 3

Students begin this course by knowing themselves and their own ethical commitments better, in addition to listening to others to find out what values are important to them and what perspectives help them make ethical decisions. These foundational exercises help students to respond to others from a place of understanding and respect. These introductory sessions weave together learning about oneself and basic critical thinking skills. Students learn about their preferred ethical perspectives and disposition towards critical thinking while being introduced to ethical plurality, the concept that more than one approach to understanding and resolving ethical dilemmas is acceptable and useful. The different emphasis on core ethical tensions between four ethical perspectives is explored: the relationship between autonomy (individuals) and equality (the community), and the relationship between rationality (our head) and sensibility (our heart). Students practice reading critically and considering people's perspectives, determining what ethical values inform their beliefs and decisions. Basic critical skills are taught that will be honed throughout the course, including, reading for meaning, and introducing the skills necessary for identifying and assessing concepts and arguments. Students also improve their research skills and media literacy. The contextual backdrop for these introductory sessions is the general relationship between business and society, specifically the Canadian business system and context, and the fundamentals of capitalism.

Module 1: Sessions 4, 5 and 6

“Adept-Ethical Decision-Maker Level” -- Understanding issues, positions and stakes

In the next level of the course, students analyze ethical dilemmas using the critical skills and the different perspectives taught in the foundational sessions to consider the values in tension. In Module 1, stakeholder theory and arguments are interwoven with the practice of stakeholder management capability and collaboration, and stakeholder matrix mapping. The focus is on understanding, identifying and defining moral issues, positions and stakes drawing on an enhanced stakeholder model. Students learn and apply the four-step, Baird Decision Model for critical thinking in action: Be attentive, reflective, intelligent, reasonable and responsible. Students practice ethical agility by interpreting through four ethical lenses: rights/responsibilities, results, reputation and relationships. Students learn and practice balancing well the rights and privileges of individuals and the community while ensuring that their rationality has given enough structure to be fair as well as listening to their own hearts to have enough flexibility to allow people and communities to thrive. Students play hot topic, real life dilemma simulation games and complete online, ethical exercises to practice creative moral problem solving and decision making.

Module 2: Sessions 7, 8 and 9

“Expert Ethical Decision Maker Level” -- Theories, concepts, arguments and proposed resolutions

In Module 2 students take moral positions, while practicing ethical disagreement and avoiding errors in thinking. Emphasis is on grounding creative, proposed resolutions in mindfulness awareness, sustainability, and social responsibility. Drawing on the skills taught in sessions 1 to 6, applying the perspectives of various ethical theories, students explain and justify their moral positions and persuade others to be their ethical best. Module 2 focuses on the seven most cited principles of ethical analysis and how each corresponds to students’ personal ethical lens. Students complete online ethics exercises and play Hot Topic Real Life Dilemma Simulation Games.

Module 3: Sessions 10, 11 and 12

“Master Level Ethical Decision Maker” -- Analyzing and assessing corporate ethical performance

Module 3 integrates the theory, conceptual frameworks and practice involved in management and ethics according to organizing for ethical business practice. Students learn and apply the concepts and arguments behind establishing objectives for a socially responsible, ethical and sustainable organization and identify and practice structuring an organization to reinforce an ethical culture. In this final module of the course, students role-play as Ethical Consultants in their own consultancy firm who analyze and assess corporate ethical performance and leadership in an organization. Students complete a Corporate Report Card.

Special Features:

This course is taught using “gamification” and a partially customizable learning experience in a unique “Simulation and Role-Playing Game, Choose-your-own-adventure” format.

Gamification. Gamification is the application of game-design elements and gaming principles in non-game contexts; for example, in education, learning and the classroom setting. This course is gamified in two main ways. First, with the aim of promoting deep and transformational learning, students play online Hot Topic Dilemma Simulation Games and complete online game-like Ethics Exercises. In some games, students take on roles, such as playing specific stakeholders and conducting analysis from the

perspective of that stakeholder. Second, this course draws on game-design elements, such as students working and competing in Learning Team Guilds. A guild is an organized group of players that regularly play together in one or more multiplayer games. Students *level-up* through the three modules of the course, as they would in a massively, multi-online role-playing game. After successfully completing Module 1, students earn the status of “Adept Ethical Decision-Maker.” After completing Module 2, students earn the status of “Expert Ethical Decision Maker.” After completing Module 3, students earn the status of “Master Ethical Decision Maker.”

Customizable Learning Experience – Choose-your-own-adventure Format. This course includes a student-centered, partially customizable learning experience component delivered through a choose-your-own-adventure format. At the beginning of the course, students individualize their learning experience by completing an “Ethical Lens Inventory (ELI)”, an ethical typology that helps people identify their preferred ethical lens. The knowledge gained from the ELI allows learners to appreciate ethical diversity and learn how to more effectively communicate with others to resolve conflict. Students write a “Personal Ethics Statement” that includes articulating their core values. Students build on the foundational knowledge of their own core values and learn how to facilitate conversations using those ethical priorities in a variety of settings. Students also learn to recognize and diffuse conflict in difficult situations. In the process, they become more skilled critical thinkers and ethical decision makers by gaining a better understanding of what motivates themselves and others to be successful. Furthermore, students can customize their learning experience by structuring the course around moral topics and issues that interest them. Students also chose one affective (attitudinal or emotional) disposition or habit that they wish to improve or cultivate from a provided list at the beginning of the course. Students customize and tailor assignment topics to their chosen interests.

Learning Contract. This course includes a rare, unique feature: signing of a Learning Contract between instructor and student. The Learning Contract is developed organically from an ice-breaking, first-class session exercise outlining the student and instructor responsibilities. The Learning Contract gives student and instructor the opportunity to discuss expectations, strengths and challenges and how to manage conflict. The process involves the creation of a collective mission statement, values inventory, code of conduct, and code of ethics generated by and for the class. In the debriefing, students are taught the definition and significance of these important corporate social responsibility concepts and practices; for example, the difference between a code of ethics and a code of conduct.

Critical Thinking. This course interweaves theory and practice to move beyond traditional business ethics courses with the aim of helping students to develop a set of critical thinking skills that can be integrated into daily life. This course design and pedagogy emphasizes the rigorous defense and challenge of positions through arguments and ideas via ethical disagreement. This cumulative, skills-based course teaches students how to read, write and think critically through: (1) a collection of critical skills, practices, techniques, attitudes and principles that can be used every day to systematically evaluate your own and others’ reasoning about morality and values; (2) an approach to ethical disagreements and controversial moral issues using rational standards and mindfulness awareness; (3) critical assessment and formulation of ethical beliefs, arguments, and concepts based on relevant, acceptable and sufficient grounds, rather than passive acceptance.

Class Participation Expectations:

Each class session, approximately 2 hours and 50 minutes in length with a 10 to 15-minute break, consists of mini-lectures, lecture participation assignments, online games and exercises, and small learning team work. Most classes begin with a 10-minute, quiz about the session's required readings. Attendance is mandatory.

Overview of Class Participation Marks.

No mark for participation.

Class Preparation Expectations.

- Required readings must be completed before coming to class.
- Attendance is mandatory.
- Assignments listed in the "Assignments Due" part of the "Class-by-Class Syllabus" must be completed and submitted in that designated class session, as specified on this syllabus.
- Always bring your textbooks and course outline to class.

Class-by-Class Syllabus

Topics, readings, and other preparations for every class are listed below.

Note: If any changes in this schedule become necessary, notifications will be posted on the Moodle course site, and when changes need to be announced between classes, an email will be sent to students' email accounts associated with the Moodle site, notifying them of the change. Schulich's Course Management Database (CMD) will not be used for this course.

FOUNDATIONAL CRITICAL THINKING SESSIONS

Session (1)	<p>Introduction to the Course, the Ethical Self, Values and Business and Society</p> <p>Themes: What is this course all about? How should I best understand the course outline and class expectations? What are the four ethical lenses? What is my preferred ethical perspective? What is the difference between ethics and values? What are core values? What are values in tension? What is the distinction between Codes of Conduct and Codes of Ethics? What is a mission statement? What is a Values Inventory? What is the general relationship between business and society? What specifically is the Canadian business system and context?</p> <p>Topics: Introduction to the course through a guided tour of course outline. Forming of Learning Team Guilds. Learning Contract Exercise and signing of Learning Contract. Guild exercise to create for this course: Code of Conduct, Code of Ethics, and Mission Statement. Complete "Ethical Lens Inventory" in EthicsGame. Class framed by an exploration of personal, business and societal contexts of values and ethics.</p> <p>Read:</p>
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- *Ethics, Responsibilities and Sustainability*, entire chapter 1: The Relationship between Business and Society.

Personal Ethics Statement and Values Inventory - assigned in session 1 and due in session

2:

- Write up your Personal Ethics Statement and Values Inventory, as per the model taught in Session 1 and as per the instructions posted to the Moodle course site. Upload an electronic version of your assignment to the Session 1 link in Moodle. Also, submit a hard, paper copy at the beginning of class in Session 2. Approximate length: 250 – 400 words, or less than 2 pages, double-spaced.

Assignment DUE in Session 1:

- None.

Session
(2)

Critical Thinking, Reading for Meaning and the Baird Decision Model

Themes: What is critical thinking? Why bother thinking critically? What are emotional dispositions towards critical thinking? What is an argument? What is an abstract idea? How can I read for meaning? What are the fundamental elements of capitalism and some ethical implications of each? What is unique about Canadian capitalism? What are the various forms of capitalism? What is the Baird Decision Model and why is it important?

Topics: Class begins with each student (individually, without collaboration) completing a short, timed, quiz about session 2 required readings in REEF. Choose an Affective Disposition of Critical Thinking you would like to cultivate from the list outlined in class. Post your chosen Affective Disposition to REEF. Introduction to critical thinking and the Baird Decision Model. Explanation of what an argument and concept are using the eight fundamental elements of capitalism. Techniques for actively reading for meaning applied to a passage.

Read:

- *Ethics, Responsibilities and Sustainability*, entire chapter 2: Ethics and Capitalism.

Individual Learning Quest 1: Passage Analysis – worth 10% of final mark – assigned in session 2 and due in session 3:

- Select one of the eight fundamental elements of capitalism from the textbook and taught in session 2. Read “The Fundamental” and “Ethical Implications” corresponding to the element you selected. Analyze the “Ethical Implications” of the element: (1) Annotate the passage according to the model taught in class; (2) State the main point of the “Ethical Implications” passage (what it is the author of the passage trying to convince you of) and state the reasons the author gives, if any, in defense of their position (support or evidence) – Diagram in Standard Argument Form taught in session 2; (3) List the most main concepts (abstract ideas) around which the “Ethical Implications” passage turns; and (4) Answer the following question: Are you convinced by this argument? Why or why not? Take a stand. Not necessary to do outside research. Enter answers into link posted to Moodle site under Session 2. Also, submit paper copy at the beginning of session 3. Approximate

length, not including an annotated copy of the passage: 250 – 400 words, or less than 2 pages, double-spaced.



Assignment *DUE* in Session 2:

- **Personal Ethics Statement and Values Inventory.** For instructions, see Session 1.

Session
(3)

Research and Investigative Skills and Media Literacy

Themes: How can I improve my research and investigative skills? What is Media Literacy? How do I go about conducting library and internet research? How can I avoid the dishonest practices of plagiarism and cheating? What is York University’s Policy on Academic Honesty?

Topics: Conducting library research. 90-minutes of the class will be spent getting training as a class from a Bronfman Business Library librarian in the Schulich second floor library training room. In remaining class time, students will learn about media literacy. Students will individually select and answer questions about their chosen website in REEF. These questions will be provided and explained in class. 15 minutes of class time will be devoted to explaining the key points of York’s Policy on Academic Honesty:

http://www.yorku.ca/tutorial/academic_integrity/polpoints.html



Assignment *DUE* in Session 3:

- **Individual Learning Quest 1: Passage Analysis.** For instructions, see Session 2.

Read:

- No Reading.

Module 1 UNDERSTANDING ISSUES, POSITIONS AND STAKES – Adept Ethical Decision-Maker Level

Session
(4)

Critical Thinking in Action: Identifying Stakeholders

Themes: What are personal standards and how are they formed? Why is it that moral issues cannot be resolved by appealing to personal moral standards? What is a stakeholder? What is a stake? What is a moral issue? How can I identify the corporation’s stakeholders generally and the stakeholders relating to specific moral issues confronting the corporation? What are the arguments for the stakeholder concept? What are the purposes, benefits, and significance of issues and stakeholders? What is the Baird Decision Model? How can I use the Baird Decision Model to promote critical thinking in action?

Topics: Class begins with each student (individually, without collaboration) completing a short, timed, quiz in REEF about session 4 required readings. Understanding personal moral standards. Identifying external versus internal stakeholders, and normative versus derivative

stakeholders. The Baird Decision Model will be taught using a moral issue. Students will play a timed Scavenger Hunt Game: Learning Team Guilds will search the internet to compile a list of as many business ethics, corporate social responsibility and sustainability issues. Guild with the longest list wins. Guilds will enter the lists into REEF. All Guild lists will be available for viewing to all students. Guilds will pick a business ethics, corporate social responsibility or sustainability issue of interest to focus on in Module 1 and divide up the task of researching into the issue. Learning Team Guilds will complete an online EthicsGame group exercise applying the Baird Decision Model.

Guild Learning Quest #1 – Due in Session 5: Investigate a Moral Issue – worth 10% of final mark – using the skills learned in the Library Training Session in session 3.

- Guild members will divide up the task of researching into the meaning and significance of their chosen moral issue. Write out your findings as follows: a bibliography of your sources and a definition of the issue in no more than one page double-spaced. Find out as much as you can in one week on the issue. Upload findings and outline of the issue to the link on the Moodle course site posted to Session 4. Be prepared to briefly report your findings to the entire class in Session 5 using classroom technology.

Read:

- *Ethics, Responsibilities and Sustainability*, entire chapter 3: Identifying Stakeholders and Issues.

Assignment Due in Session 4:

- None.

Session
(5)

Critical Thinking in Action: Stakeholder Relations and Analysis

Themes: What is basic stakeholder analysis? What is stakeholder management capability? What is a stakeholder map and can I create one? How can I understand the relationship between the organization and the stakeholders using stakeholder matrix mapping? How can I diagnose stakeholder's potential for cooperation with or threat to the organization? How can I use stakeholder salience and attributes to classify stakeholders as latent, expectant, definitive, or non-stakeholders? What is the difference between Stakeholder Management and Stakeholder Collaboration? What is Social Capital and how is it relevant to stakeholders and creating business value?

Topics: Class begins with each student (individually, without collaboration) completing a short, timed, quiz in REEF about session 5 required readings. Learning Team Guilds will: (1) briefly present their Learning Quest #1 findings to the entire class; (2) create a stakeholder map for their chosen moral issue.

Read:

- *Ethics, Responsibilities and Sustainability*, entire chapter 4: Stakeholder Relations and Analysis.

Guild Learning Quest #2: Create a Stakeholder Map – worth 10% of final mark. Due at the end of Session 5, completed in class, using class time.

- Learning Team Guilds will use class time to research into and select a corporation that is associated with a moral problem concerning the Guild’s chosen moral issue. Guilds will create a Stakeholder Map for their chosen corporation. See handout and session 5 required readings. Each member of the Guild will pick a Stakeholder who they are interested in from the Stakeholder Map.

Individual Learning Quest 3: Stakeholder Analysis Report – worth 10% of final mark. Assigned in Session 5 and due in Session 6.

- Complete the “Stakeholder Analysis Report” discussed in session 5 class and posted to session 5 of the Moodle course site. You will need to determine and write up a point form list of the stakes corresponding to (held by/relevant to) your chosen Stakeholder from your Guild’s Stakeholder Map. Plot your stakeholder on “The Position/Importance Matrix” on pg. 77 of *Ethics, Responsibilities and Sustainability*. Answer the following three questions about your stakeholder in sentence form. (1) Is your stakeholder problematic, antagonistic, low priority or a supporter? Why or why not? (2) Is your stakeholder a mixed blessing, supportive, non-supportive or marginal stakeholder? Why or why not? (3) Based on your stakeholder’s salience, is the stakeholder latent, expectant, definitive or a non-stakeholder? Why or why not? Always support your answers with reasons and draw on the session 5 text readings.



Assignment DUE in Session 5:

- **Guild Learning Quest 1 (assigned in Session 4).**
- **Guild Learning Quest 2 (completed in class, using class time).**

Session
(6)

The Environment and Sustainability: Understanding Moral Issues and Problems

Themes: What is a moral problem? What characterizes and defines a moral problem? How is a moral problem different from an issue? How can I state a moral problem in complete question form with relation to an issue? How can I creatively solve moral problems? What is the extent of business’s responsibilities to the environment? What are the different types of environmentalism? Are there dissenting views on the environment and how businesses should respond? What are some different approaches to achieving sustainability strategy and the challenges involved?

Topics: Class begins with each student (individually, without collaboration) completing a short, timed, quiz in REEF about session 6 required readings. Students will measure their environmental foot print online. Learning Team Guild members will be given class time to exchange “Individual Learning Quest 2” answers and peer review each other’s homework according to questions and criteria provided on a peer review worksheet. Guilds will play an EthicsGame Hot Topic Real Life Dilemma Simulation Game concerning sustainability, and state the moral problem in complete question form corresponding to their simulation.

Read:

- *Ethics, Responsibilities and Sustainability*, entire chapter 14: The environment and business responsibilities.

Module 1 Assignment: Stakeholder Analysis and Define a Moral Problem – worth 20% of final mark. Assigned in Session 6 and due in class in session 8.

- Submit paper copy in class at the beginning of session 7 and upload to the link posted to Session 6 of the Moodle course site. Transform your “Individual Learning Quest 2,” your peer reviewed “Stakeholder Analysis Report,” into your Module 1 Assignment. State the moral problem in complete question form from the perspective of your stakeholder. Briefly explain why, from your perspective, this moral problem involves ethics and/or describe the moral dilemma. Conclude your assignment by answering the following question from the perspective of your stakeholder: “How would I like to see this moral problem resolved?” Maximum 5 pages double-spaced, not including “Position/Importance Matrix” and “Individual Learning Quest 3.” Double-spaced, 1” margins, 12-size font.



Assignment DUE in Session 6:

- **Individual Learning Quest 2: Stakeholder Analysis Report (assigned in Session 5).** For instructions, see Session 5.

Module 2 TAKING A POSITION: THEORIES, CONCEPTS, ARGUMENTS AND PROPOSED RESOLUTIONS – Expert Ethical Decision Maker Level

Session
(7)

Business Ethics and the Ethical Implications of Business

Themes: What is business ethics? What are the three levels of assessing ethical implications? What are the five categories of influences on ethical behavior? What is ethical relativism and why should I care about it? How can I tell the difference between values, morals and ethical principles? What is moral reasoning? Do people have identifiable cognitive skill levels that they use in resolving moral dilemmas?

Topics: Class begins with each student (individually, without collaboration) completing a short, timed, quiz in REEF about session 7 required readings. The consequences of taking ethical relativism seriously will be discussed. Guilds will play an EthicsGame Hot Topic Real Life Dilemma Simulation Game concerning business ethics. Kohlberg’s Stages of Moral Development will be discussed concerning the simulation game.

Read:

- *Ethics, Responsibilities and Sustainability*, entire chapter 5: Ethics of Business: The Theoretical Basis.

Assignment DUE in Session 7:

- None.

Session
(8)

The Theoretical Basis of Business Ethics and Principles of Ethical Analysis

Themes: What are the seven most cited principles of ethical analysis? How do I apply these principles to resolving a moral problem? How do the four ethical lenses map onto the seven principles of ethical analysis? Which of the seven most cited principles of ethical analysis correspond with my personal ethical lens?

Topics: Class begins with each student (individually, without collaboration) completing a short, timed, quiz in REEF about session 8 required readings. Using class time and working in their Guilds, individually drawing on their own module 1 assignments, students will begin formulating a proposed resolution to their Guild's moral problem using the Baird Decision Model and by applying four ethical lenses and the corresponding principles of ethical analysis.

Read:

- *Ethics, Responsibilities and Sustainability*, entire chapter 5: Ethics of Business: The Theoretical Basis.

Individual Learning Quest 4: Mapping Personal Ethical Perspectives to Principles of Ethical Analysis – Worth 10% of final mark. Assigned in Session 8 and due in Session 9.

- Review your "Personal Ethics Statement and Values Inventory," submitted in Session 2. Map your personal ethical lens or perspective onto the seven principles of ethical analysis. Use the worksheet provided to show which of the principles of ethical analysis correspond to your personal ethical lens. Explain and support your answer with reference to course readings and class material. Submit paper copy in Session 9. Also, upload electronic copy to link posted under Session 8 in Moodle course site.



Assignment Due in Session 8:

- **Module 1 Assignment: Stakeholder Analysis and Define a Moral Problem.** For instructions, see Session 6.

Session
(9)

Proposing a Defensible Solution to a Moral Problem and Completing a Case Analysis

Themes: How can I formulate a defensible proposed solution to a moral problem that is specific, measurable, assignable, realistic and time-related? What is a S.W.O.T. analysis and how is it done?

Topics: Using the full 2 hours and 50 minutes of class time, and working in their Guilds, students will complete as much of the Module 2 assignment as possible in class: (1) Formulate a defensible proposed resolution, that meets the S.M.A.R.T. criteria, to their Guild's moral problem by using the Baird Decision Model, drawing on the four ethical perspectives; (2) do a S.W.O.T. analysis of the proposed solution following the model taught in class; (3) combine all of their module 1 assignments into one complete case analysis; and (4) write up the main features of the case.

Module 2 Assignment Information: The Module 2 assignment is a group assignment, worth 20% of final mark. A paper copy of the **Module 2 Assignment is due in Session 10** and consists of the following parts, in the following order:

1. Title page with: all team member's names and student numbers; name of company and title of case.
2. Review of the main features of the case.
3. Stakeholder analysis.
4. Statement of the moral problem in complete question form.
5. Explanation of why the problem involves ethics and/or characterization of the moral dilemma.
6. Proposed solution that meets S.M.A.R.T. criteria.
7. S.W.O.T. analysis of proposed solution.

Read:

- None.



Assignment DUE in Session 9:

- **Individual Learning Quest 3: Mapping Personal Ethical Perspectives to Principles of Ethical Analysis – Assigned in Session 8 and due in Session 9.** For instructions, see Session 8.

Module 3 ANALYZING AND ASSESSING CORPORATE ETHICAL PERFORMANCE – Master Level Ethical Decision Maker

Session
(10)

Corporate Social Responsibility: Concepts and Arguments

Themes: What is corporate social responsibility (CSR)? What are the pros and cons of CSR? What are the various foundations of CSR theories? What is Carroll's pyramid of CSR and how can it be applied to assessing the ethical performance of a corporation? What is definition and significance of four contemporary CSR concepts: corporate sustainability, reputation management, social impact, and triple bottom line (TBL)? How can the complexity of CSR be understood via a unifying framework that integrates five frameworks and three core concepts in the VBA Model?

Topics: Class begins with each student (individually, without collaboration) completing a short, timed, quiz in REEF about session 10 required readings. Guilds will review the Baird Decision Model and the 4 Ethical Lenses by playing an EthicsGame Hot Topic Real Life Dilemma Simulation Game addressing corporate social responsibility. A debriefing of the game will discuss the VBA Model.

Read:

- *Ethics, Responsibilities and Sustainability*, entire chapter 7: Corporate Social Responsibility: The Concept.



Assignment DUE in Session 10:

- **Module 2 Assignment: Case Analysis.** (Assigned in Session 9). For instructions, see Session 9.

Session
(11)

Corporate Social Responsibility: The Practice of Corporate Ethical Performance

Themes: What are the main ways to measure corporate ethical performance? What is a statement of values? What are the pros and cons of a statement of values? What is the difference between codes of conduct and codes of ethics? What is the purpose of ethics training in an organization? What are conflicts of interest? What is an ethics audit and how is one conducted? What is the difference between a quantitative and qualitative ethical audit? What is a Corporate Report Card? What is the role of ethics offices and ethics committees? What is whistleblowing and how is it related to ethics reporting systems? What is the difference between compliance-based versus values-based approaches?

Topics: Class begins with each student (individually, without collaboration) completing a short, timed, quiz in REEF about session 11 required readings. Students will take on the role of Ethical Consultant and will come up with a name for their ethical auditing organization. Students will print out and bring to session 10 one copy of their Module 2 Assignment. Guilds will exchange their module 2 assignments, so that one entire Guild has a new Module 2 assignment to work from. Guilds will read the new assignment and assess the ethical performance of this corporation using a “Corporate Report Card,” the corporation that the new assignment is based on.

Guild Learning Quest #3 – worth 10% of final mark. Due at the end of Session 11:

Corporate Report Card

- Guild members will split up the tasks of completing various parts of the Corporate Report Card and use class time to complete it, following the model taught in class.

Read:

- *Ethics, Responsibilities and Sustainability*, entire chapter 6: Ethics of Business: Management and Leadership.



Assignment DUE in Session 11:

- **Guild Learning Quest #3: Corporate Report Card**, completed in class, during session 11.
- **NOTE: Remember!** Print out and bring to Session 11 one copy of each Guild’s Module 2 assignment. To be clear: each Guild will provide one copy of their Module 2 assignment in Session 11.

Session
(12)

Globalization and Business Responsibilities

Themes: What is globalization, its pros, cons and related issues? What role do international non-governmental organizations play in influencing business? What is the connection between globalization and Canadian business and society? What are the international standards that are grading and influencing the behavior of multinational corporations? What are the special challenges confronting business due to globalization?

Topics: Guilds will play an EthicsGame Hot Topic Real Life Dilemma Simulation Game concerning globalization. Students will complete course evaluations and a debriefing process.

Read:

- *Ethics, Responsibilities and Sustainability*, entire chapter 15: Globalization and Business Responsibilities.

Assignment Due:

- None.

Written Assignments and Learning Quests: Descriptions

Due Date
Session 8
Individual
20%

Module 1 Assignment: Stakeholder Analysis and Define a Moral Problem

Worth 20% of final mark. Maximum 5 pages double-spaced, not including “Stakeholder Table” and “Position/Importance Matrix.” Double-spaced, 1” margins, 12-size font. Submit paper copy in session 8 and upload an electronic copy to the link under session 6 of Moodle course site.

Transform your “Individual Learning Quest 3: Stakeholder Analysis Report,” (discussed in session 5 class, posted to session 5 of the Moodle course site, and peer reviewed in session 6) into your Module 1 assignment. This assignment consists of:

- “Stakeholder Table” listing your stakeholder’s stakes in point form.
- Plot your stakeholder on “The Position/Importance Matrix” on pg. 77 of *Ethics, Responsibilities and Sustainability*.
- Write up of your answers to the following three questions in sentence and paragraph form: (1) Is your stakeholder problematic, antagonistic, low priority or a supporter? Why or why not? (2) Is your stakeholder a mixed blessing, supportive, non-supportive or marginal stakeholder? Why or why not? (3) Based on your stakeholder’s salience, is the stakeholder latent, expectant, definitive or a non-stakeholder? Why or why not? Always support your answers with reasons and draw on the Session 5 required readings.
- State the moral problem in complete question form from the perspective of your stakeholder.
- Briefly explain why, from your perspective, this moral problem involves ethics and/or describe the moral dilemma.

- Conclude your assignment by answering the following question from the perspective of your stakeholder, in sentence form: “How would you like to see this moral problem resolved?”

Max length: 5 pages double-spaced max length

Value: 20%

Due Date **Module 2 Assignment: Case Analysis – Evaluate the Ethical Duties and Propose a Solution to the Moral Problem**
Session 10
Group
20%

This is a group assignment, worth 20% of final mark. Submit only one assignment per Learning Team Guild. Upload an electronic copy to session 10 link in Moodle. This assignment consists of the following parts, in the following order:

- Title page with: all team member’s names and student numbers; name of company and title of case.
- Review of the main features of the case.
- Stakeholder analysis.
- Statement of the moral problem in complete question form.
- Explanation of why the problem involves ethics and/or characterization of the moral dilemma.
- Proposed solution that meets the S.M.A.R.T. criteria.
- S.W.O.T. analysis of proposed solution.

Max length: 12 pages max length

Value: 20%

Due Date **Short quizzes**
Sessions 2,
3, 4, 5, 6, 7
8, 10, 11
and 12
Individual
Pass/Fail

- 10 short quizzes will be completed in REEF about the required readings during the following sessions: 2, 3, 4, 5, 6, 7, 8, 10, 11, and 12.
- These quizzes are open book and designed to test that students have completed the required reading before coming to class.
- Each quiz will have correct and incorrect answers, and be completed individually, without collaboration.

Max length: Variable

Value: Pass/Fail

Due Date **Individual Learning Quests**
Sessions 2,
3, 6 and 9.
Individual
30%

Students will complete 3 Individual Learning Quests, independently and without collaboration. Each Quest will be marked on the quality of students’ work, according to provided grading criteria, and not for completion only. Worth 10% each for a total of 30%. All Quests will be completed individually, without collaboration, and are due in the following sessions: 3, 6, and 9. See below for assignment requirements and information.

- **Individual Learning Quest 1: Passage Analysis. Worth 10% of final mark.** Assigned in Session 2 and due in Session 3. Select one of the eight fundamental elements of

capitalism taught in session 2. Read “The Fundamental” and “Ethical Implications” corresponding to the element you selected. Analyze the “Ethical Implications” of the element: (1) Annotate the passage according to the model taught in class; (2) State the main point of the “Ethical Implications” passage (what it is the author of the passage trying to convince you of) and state the reasons the author gives, if any, in defense of their position (support or evidence) – Diagram in Standard Argument Form taught in session 2; (3) List the most main concepts (abstract ideas) around which the “Ethical Implications” passage turns; and (4) Answer the following question: Are you convinced by this argument? Why or why not? Take a stand. Not necessary to do outside research. Enter answers into link posted to Moodle site under Session 2. Approximate length, not including an annotated copy of the passage: 250 – 400 words, or less than 2 pages, double-spaced.

- **Individual Learning Quest 2: Stakeholder Analysis Report. Worth 10% of final mark.** Assigned in Session 5 and due in Session 6. Complete the “Stakeholder Analysis Report” discussed in session 5 class and posted to session 5 of the Moodle course site. You will need to determine and write up a point form list of the stakes corresponding to (held by/relevant to) your chosen Stakeholder from your Guild’s Stakeholder Map. Plot your stakeholder on “The Position/Importance Matrix” on pg. 77 of *Ethics, Responsibilities and Sustainability*. Answer the following three questions about your stakeholder in sentence form. (1) Is your stakeholder problematic, antagonistic, low priority or a supporter? Why or why not? (2) Is your stakeholder a mixed blessing, supportive, non-supportive or marginal stakeholder? Why or why not? (3) Based on your stakeholder’s salience, is the stakeholder latent, expectant, definitive or a non-stakeholder? Why or why not? Always support your answers with reasons and draw on the session 5 text readings. Approximate length, not including “The Position/Importance Matrix”: Maximum 750 words, or 3 pages.

- **Individual Learning Quest 3: Mapping Personal Ethical Perspectives to Principles of Ethical Analysis. Worth 10% of final mark.** Assigned in Session 8 and due in Session 9. Review your “Personal Ethics Statement and Values Inventory,” submitted in Session 2. Map your personal ethical lens or perspective onto the seven principles of ethical analysis. Use the worksheet provided to show which of the principles of ethical analysis correspond to your personal ethical lens. Explain and support your answer with reference to course readings and class material. Approximate length: Maximum 3 pages.

Max length: Variable; See above for details.

Value: Total 30%

Due Date
Sessions 5
& 11,
Group
30%

Guild Learning Quests

Learning Team Guilds will complete 3 Learning Quest assignments as a group. Learning Quests are NOT “for participation only.” Detailed grading criteria will be provided for each Learning Quest assignment. Worth 10% each for a total of 30%. See below for assignment requirements and information.

- **Guild Learning Quest 1: Investigate a Moral Issue. Worth 10% of final mark.**
Assigned in Session 4 and due in Session 5 – using the skills learned in the Library Training Session in session 3. Guild members will divide up the task of researching into the meaning and significance of their chosen moral issue. Write out your findings as follows: a bibliography of your sources and a definition and outline of the issue in no more than one page double-spaced. Find out as much as you can in one week on the issue. Upload findings and outline of the issue to the link on the Moodle course site posted to Session 4. Be prepared to briefly report your findings to the entire class in Session 5 using classroom technology. Approximate length: Maximum 1 page, double-spaced, not including bibliography.
- **Guild Learning Quest 2: Create a Stakeholder Map. Worth 10% of final mark.**
Assigned in Session 5 and completed using class time in Session 5. Create a Stakeholder Map. Learning Team Guilds will use class time to research into and select a corporation that is associated with a moral problem concerning the Guild’s chosen moral issue. Guilds will create a Stakeholder Map for their chosen corporation. See handout and session required readings. Each member of the Guild will pick a Stakeholder who they are interested in from the Stakeholder Map. Enter name of chosen stakeholder into REEF. Approximate length: 1-page, graphic diagram as per model outlined in class and textbook.
- **Guild Learning Quest 3: Corporate Report Card. Worth 10% of final mark.**
Assigned in Session 11 and completed using class time in Session 11. Guild members will split up the tasks of completing various parts of the Corporate Report Card and use class time to complete it, following model taught in class. Variable length.

Max length: Variable

Value: Total 30%

Evaluation of Written Assignments and Exams

Calculation of Course Late assignments will be penalized by 5 percentage points for the first day missed, with an additional point deducted for each day delayed after that. Assignments will not be accepted once marked papers are returned to class.

Calculation of Course Grade

For details, see “Written Assignments and Learning Quests: Descriptions” (pp. 15-18).

Learning Outcomes

- ➔ By the end of the MGMT1040 course, the student will have acquired the following skills that demonstrate knowledge and understanding of the main theories, concepts, and methods in the following functional areas of business.

BUSINESS ETHICS

Sessions 1 & 2:

- Describe the complexity of the interrelationships between business and society.
- Describe the Canadian business system and context.
- Define ethics.
- Define and explain personal ethics.
- Define business ethics.
- Create a Personal Ethics Statement and Personal Values Inventory.
- Define and explain the eight fundamental elements of a capitalist business system.

Session 6: The environment and sustainability – Understanding moral issues and positions

- State a moral problem in complete question form.
- Explain why a moral problem involves ethics.
- Characterize a moral dilemma.

Session 7: Business ethics and the ethical implications of business

- Define the ethics of business.
- Understand the different approaches managers and business persons take to assessing the ethical implications of their decisions.
- Identify the influences on ethical behavior and define ethical relativism.

Session 8: The theoretical basis of business ethics and the principles of ethical analysis

- Define and explain the common theoretical bases for ethical conduct.
- Define and explain the seven most cited principles of ethical analysis.
- Apply the seven most cited principles for ethical analysis to resolving a moral problem.
- Explain how the four ethical lenses map onto these principles for ethical analysis.
- Determine how one's own personal ethical lens dovetails with these ethical principles.
- Appreciate the challenges of ethics in business.

Session 9: Proposing a defensible solution to a moral problem and completing a case analysis

- Draw on and use the theoretical basis for ethical analysis taught in session 8.
- Formulate a defensible proposed solution to a moral problem that meets the S.M.A.R.T. conditions.
- Apply a S.W.O.T. analysis to this proposed solution.

CORPORATE SOCIAL RESPONSIBILITY

Session 4: Stakeholder Analysis and Practice

- Recognize business as one institution in society and understand that its activities are influenced by other institutions and individuals referred to as stakeholders.

- Define and identify the corporation's stakeholders generally and the stakeholders relating to particular issues confronting the corporation.
- Understand the dynamic nature of stakeholder influence and that stakeholders have different goals and influence.
- Recognize the role of managers in relation to stakeholders.
- Formulate arguments supporting and opposing the stakeholder concept.
- Explain stakeholder analysis in an organization.

Session 5: Stakeholder Analysis and Practice Continued

- Describe stakeholder management capability.
- Understand stakeholder matrix mapping.
- Discuss the diagnostic typology of organizational stakeholders.
- Apply the stakeholder identification and salience typology.
- Explain the application of stakeholder influence strategies.
- Identify the use of stakeholder collaboration approaches.
- Define social capital and understand its relationship to stakeholder theory.

Session 7: Business ethics and the ethical implications of business

- Debate the pros and cons of corporate social responsibility in Canadian business.
- Appreciate the various foundations of social responsibility theories.
- Explain Carroll's pyramid of corporate social responsibility.
- Define the four contemporary CSR concepts: corporate sustainability, reputation management, social impact management, and triple bottom line.
- Describe corporate and business citizenship.
- Explain the complexity of corporate social responsibility by understanding a unifying CSR framework.
- Identify the different responses to corporate social responsibility.
- Define corporate philanthropy and describe the form it takes.
- Define corporate voluntarism and describe the implications for employees, employers and the community.
- Appreciate the challenges confronting small businesses in practicing CSR.
- Identify emerging trends and issues that arise as CSR takes on different forms and approaches.

Session 10: Corporate Social Responsibility – Concepts and Arguments

- Define and describe the pros and cons of a statement of values.
- Make the distinction between codes of conduct and codes of ethics.
- Appreciate the purpose of ethics training in an organization.
- Define an ethics audit.
- Explain the role of ethics officers and ethics committees.
- Understand how ethics reporting systems work and define whistleblowing.
- Know who is responsible for managing the ethics of business.
- Identify the approaches to ethics programs.
- Evaluate ethics programs and list their benefits.
- Recognize that ethical misbehavior may occur despite management efforts and the implementation of ethics programs.

SUSTAINABILITY

Session 6: The environment and sustainability – Understanding moral issues and positions

- Understand the extensiveness of business's responsibilities toward the environment.
- Define two key terms: the environmental ethic and sustainable development.
- Identify and define the main environmental concerns confronting business and society.
- Describe the influence of government in addressing environmental concerns.
- Define environmental non-governmental organization (ENGO) and appreciate its influence on the corporation.
- Explain how market-driven environmentalism would work.
- Describe a corporation's structural and strategic responses to environmental concerns.
- Understand how the main functions of a corporation are influenced by environmental concerns and how to identify the responses necessary.
- List the sustainability measures and standards that exist and become aware of corporate and industry initiatives to report on their environmental responsibilities.
- Appreciate that there are dissenting views on the environment and consider how business should respond.
- Identify the opportunities and challenges for a corporation's response to environmental concerns.
- Understand the link between corporate strategic management and sustainability strategy, and why corporations have different types of sustainability strategies.
- Appreciate that there are different approaches to achieving sustainability strategy and that challenges are involved in the process.

Session 11: Corporate Social Responsibility – The practice of ethical corporate performance

- Define and describe the pros and cons of a statement of values.
- Make the distinction between codes of conduct and codes of ethics.
- Appreciate the purpose of ethics training in an organization.
- Define an ethics audit.
- Explain the role of ethics officers and ethics committees.
- Understand how ethics reporting systems work and define whistleblowing.
- Understand and identify who is responsible for managing the ethics of business.
- Identify the approaches to ethics programs.
- Evaluate ethics programs and list their benefits.
- Recognize that ethical misbehavior may occur despite management efforts and the implementation of ethics programs.
- Assess an organization's attempts to create and maintain ethical responsibility.
- Conduct an informal ethical audit of a large corporation, a company whose shares are publicly traded and are held by a large number (hundreds or thousands) of shareholders, using a Corporate Report Card.
- Analyse and assess the structures and policies that might be implemented to ensure an ethically responsible organization.
- Generate a plan and proposal for policies and practices that might be implemented to ensure an ethically responsible organization.
- Conduct research using library's databases and the internet.

GLOBALIZATION

Session 12: Globalization and business responsibilities

- Recognize that global business brings new business responsibilities.
- Define globalization, identify related issues, and list the pros and cons.
- Describe the role international non-governmental organizations play in influencing business.
- Name the main supra-national institutions influencing globalization.
- Understand the connection between globalization and Canadian business and society.
- Become familiar with the international standards that are guiding and influencing the behavior of multinational corporations.
- Appreciate the special challenges confronting business as a result of globalization.

➔ By the end of the MGMT1040 course, the student will have acquired the following skills that demonstrate critical analysis and decision-making.

Identify and analyze complex business problems using cross-functional business knowledge and the appropriate quantitative and qualitative methods.

- Identify the main conclusion and main reasons given in support of an argument concerning the fundamental elements and ethical implications of capitalism.
- Extract and define the main concepts or abstract ideas from arguments concerning the fundamental elements and ethical implications of capitalism.
- Critically read a passage for meaning.
- Define a moral problem in complete question form by determining and stating the problem and stating the perimeters, conditions and context of the problem in the form of a question including “given that’s.”
- Evaluate a moral problem by detecting the moral problem and checking it against criteria for determining a moral problem.
- Research into a moral issue surrounding a complex, moral problem in business.
- Identify and distinguish between a complex moral issue and a complex moral problem in business settings.
- Analyze and assess an organization’s attempts to create and maintain ethical responsibility by conducting an informal ethical audit of a large corporation using a Corporate Report Card, annual report and textbook concepts and frameworks.
- Write and produce a Case Analysis of a complex, moral business problem.
- Write and produce a S.W.O.T. Analysis of a proposed solution to a complex, moral business problem.
- Write and produce a S.M.A.R.T. conditions document concerning a proposed solution to a complex, moral business problem.

Devise viable, innovative, and culturally appropriate business solutions that satisfy the needs of stakeholders.

- Identify stakeholders and corresponding stakes.

- Analyze the position and importance of stakeholders relative to each other.
- Evaluate stakeholder typology and salience.
- Create a “Stakeholder Table” naming the primary and secondary stakeholders and listing their stakes.
- Create a “Position/Importance Matrix” plotting stakeholders’ position and importance in graphic form.
- Generate a proposal for policies and practices that might be implemented to ensure an ethically responsible organization.
- Write and produce a Case Analysis of a complex, moral business problem.
- Write and produce a S.W.O.T. Analysis of a proposed solution to a complex, moral business problem.
- Write and produce a S.M.A.R.T. conditions document concerning a proposed solution to a complex, moral business problem.

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

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

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

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

Undergraduate

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

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

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

Unauthorized Collaboration is a form of “cheating” and means working with others without the specific permission of the instructor on assignments that will be submitted for a grade. Students may not collaborate without faculty authorization. All work submitted for a grade must be the student’s own original, independent work, unless the instructor permits collaboration, use of sources, or outside assistance. Students must comply with the course rules, and may only work together, or receive help, to the extent allowed by the instructor. If unsure about the limits, students must seek the instructor’s permission before working with one another. Even if the instructor permits collaboration, it is never ethical to copy someone’s work or let them copy yours, unless specified by the instructor. If your instructor asks whether you worked with anyone on an assignment, always tell the truth. Finally, study groups in the form of *Facebook User Groups* are seen by the course instructor as forms of “*unauthorized collaboration*.”

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

New Course Proposal: EMBA 6015: The New Era of Marketing in China

1. **Program:** Kellogg-Schulich Executive MBA
2. **Course Number:** EMBA 6015
3. **Credit Value:** 2.0
4. **Long Course Title:** The New Era of Marketing in China
5. **Short Course Title:** The New Era of Marketing in China
6. **Effective Session:** Fall 2017

7. Calendar (Short) Course Description:

This course focuses on ways for companies to develop their marketing, branding and communication that is relevant to Chinese consumers. It seeks to build knowledge, understanding, and skills in the analysis of marketing problems and the development and implementation of marketing strategies in China. The course uses a mix of short lectures and cases, which simulate real world marketing problems.

8. Expanded Course Description:

This course aims to with the right knowledge about the rapidly growing consumer market in China and help them identify ways to develop marketing, branding and communication that is relevant to Chinese consumers. It seeks to build knowledge, understanding, and skills in the analysis of marketing problems and the development and implementation of marketing strategies in China. The specific learning objectives in this course include: (i) deepening the students' understanding regarding the Chinese market and Chinese consumers; (ii) sharpening decision-making skills by making and defending marketing decisions in the context of realistic culture- and environment-related situations; and (iii) appreciating how the elements of a successful marketing program fit together in China.

The course utilizes a mixture of lectures and cases. The lectures will discuss established marketing concepts, frameworks, and decision-analytic tools. The lectures on a given topic will be followed by case discussions, and analytical exercises. The cases simulate real-world marketing problems and as such, they are often characterized by uncertainty and incomplete information. The cases will provide students with a forum for developing, presenting and defending their recommendations when a range of solutions are feasible. Importantly, the cases also provide an opportunity for critically examining and discussing the recommendations of others.

9. Rationale:

China is a rapidly growing consumer market with ever more companies throughout the world looking for ways to develop marketing, branding and communication that is relevant to Chinese consumers. The aim of this course is to equip our students, many of whom will at some point throughout their career come in contact with Chinese consumers, with the right knowledge about the Chinese market and provide insightful analysis. Therefore, this course focuses on the Chinese market and seeks to build knowledge, understanding, and skills in the analysis of marketing problems and the development and implementation of marketing strategies in China.

10. Evaluation:

The assessment for this course consists of three elements:

- Class contribution (30%), depending on students' preparation and active participation in class discussions;
- Group case reports (40%), with each group having to complete two reports during the course, identifying strategic issues, conducting analysis and making recommendations;
- Take-home exam (30%), with details to be provided in class.

11. Integrated Courses:

This course is not integrated.

12. Crosslisted Courses:

This course is not crosslisted.

13. Faculty Resources:

This course will be taught by Professor Ying Zhang, who is Professor of Marketing and Behavioral Science at the Guanghua School of Management at Peking University. Professor Zhang received his MBA and PhD from the Booth School of Business at University of Chicago. He does research in consumer motivation, branding and customer relationship management and has published extensively in both marketing and psychology. Professor Zhang currently teaches marketing strategy and consumer psychology courses at Guanghua.

14. Physical Resources:

This course will be offered annually during a global elective week at the Shanghai campus of our partner within the global Kellogg, the Guanghua School of Management at Peking University, which will provide all the necessary physical resources before, during and after the course. These resources can be supplemented with the resources of York University Library, should this prove necessary (see below).

15. Bibliography and Library Statement:

All required readings will be made available to participants by the Guanghua School of Management before and during the course. Further readings can be accessed remotely via the York University library, which also allows electronic access to relevant readings and toolkits.

MEMORANDUM
Peter F. Bronfman Business Library

SUBJECT: Library Statement
The New Era of Marketing in China
Kellogg Schulich EMBA Program

FROM: Sophie Bury
Head, Peter F. Bronfman Business Library

DATE: May 25th 2017

EMBA 6015: The New Era of Marketing in China

This proposed new EMBA course, to be taught at Schulich's partner school Guanghua at their Shanghai campus, aims to engage students in analysis of marketing problems in China, and to help them build skills and understanding of approaches to developing and implementing marketing strategies in a Chinese context.

It is noted that students have no required textbook for this course. Lectures and cases will be made available to them. While York University Libraries are not required to support this course directly, the online resources available to support this course are summarized, and are available to all registered students remotely.

Students in this course are expected to prepare group case reports, and to complete a final examination. Students would be able to supplement what is learned through cases, lectures and class discussions by consulting relevant library databases. Access to relevant periodical literature (journals, magazines and newspapers) on themes explored in this course is available via *Proquest Business*, *Business Source Complete*, *Factiva*, and *Lexis Nexis Academic*.

Other e-resources of relevance include e-books on topics covered in this course. Relevant e-book packages include but are not limited to *Books 24x7*, *Springer E-Books*, and *E-Books at Scholars Portal*. Note that all e-books are findable by searching the library catalogue at www.library.yorku.ca and filtering to e-book content.

In addition, market research reports and data with coverage of Chinese themes and topics can be found in databases such as *Passport*, *World Advertising Research Center (WARC)*, *IBISWorld*, *Marketline Advantage*, *BMI Research*, and *Mergent Online*. The library also offers a dedicated marketing research guide at: researchguides.library.yorku.ca/marketingresearch In addition, a guide on country and city specific e-resources, many of which include China, is available at: researchguides.library.yorku.ca/countryinternationalbusiness

Finally, BRYT (Business Research at York Toolkit) – bryt.library.yorku.ca/ - is recommended as it offers short videos and real-time database walkthroughs which guide students through conducting business research with content on marketing resources to be added by Fall 2017.

The New Era of Marketing in China

Instructor: Ying Zhang

Semester: Fall 2017

Credit Hour: 15

Prerequisite: None

Program: Guanghai-Kellogg EMBA

Time: Nov 8-13, 2017

Credits: 1

Location: Shanghai, China

Contact Information:

Office: NGB 446

Tel: 10-62756275

Email: zhang@gsm.pku.edu.cn

Overview and Learning Objectives

China is a rapidly growing consumer market with more companies throughout the world looking for ways to develop their marketing, branding and communication that is relevant to Chinese consumers. The aim of this course is to equip students with the right knowledge about China market and provide insightful analysis. Therefore, this course focuses on China market and seeks to build knowledge, understanding, and skills in the analysis of marketing problems and the development and implementation of marketing strategies in China.

Our specific learning objectives in this course include the following:

- Deepen students' understanding regarding China market and Chinese consumers.
- Sharpen decision-making skills by making and defending marketing decisions in the context of realistic culture and environmental related situations.
- Appreciate how the elements of a successful marketing program fit together in China.

The course utilizes a mixture of lectures and cases. The lectures will discuss established marketing concepts, frameworks, and decision-analytic tools. The lectures on a given topic will be followed by case discussions, and analytical exercises. The cases simulate real-world marketing problems and as such, they are often characterized by uncertainty and incomplete information. The cases will provide you with a forum for developing, presenting and defending your recommendations when a range of solutions are feasible. Importantly, the cases also provide an opportunity for critically examining and discussing the recommendations of others.

You will need to form teams to prepare for the cases, both written and oral. We will form teams with no more than five students per team. You will form your teams no later

than the end of the first session. Also, one team member from each team should email me (zhang@gsm.pku.edu.cn) with the names of their team members as soon as they are finalized.

Course Requirements and Grading

Your final grade in the course will be based on both individual and group work. Your final grade will be based on:

- Class Contribution 30%
- Group Case Reports 40%
- Final Examination 30%

A. Class Contribution (30%)

This course utilizes the case method to provide an opportunity to apply theories, concepts, and analytical tools discussed in class to a simulated business environment. Case discussions allow you to present your analysis, argue for your recommendations, and to learn actively from others in the class. Case discussions depend crucially on your preparation and contribution. Lecture classes also offer the opportunity to contribute.

B. Group Case Reports (40%)

Each group needs to complete two written case reports during the course. The group case reports are due in hard copy format at the beginning of the class period on the due date. For these reports, there is a strict upper limit of four pages of text, including any exhibits you choose to include (assuming 12-point font, double-spacing, and one-inch margins). In preparing your reports, I suggest you use the following format:

- **Strategic Issues and Problems:** State the purpose of the report and specify the problems/decisions to be addressed in your analysis. This typically goes beyond simply restating the assignment questions.
- **Analysis:** This is the heart of your report. It entails marshaling data which support your problem identification, analyzing causes of the problem and/or decision options, and your recommended course of action. Don't hesitate to use the tools discussed in class and remember that analysis goes beyond mere repetition of case facts to provide conclusions and implications.
- **Recommendations:** State the manner in which each of the problems/decisions you have identified and analyzed should be resolved. In this section, only your recommendations should be discussed and justified; do not introduce new analysis.
- **Exhibits:** Make sure that you tie your exhibits to the text of the report and the logical flow of your analysis. Exhibits added to a report which are not integral to the discussion in the text (or, worse yet, not even referenced in the text) will detract from the

effectiveness of the report.

C. Final Examination (30%)

We will have a take-home exam, details of which will be discussed in class.

(Important!) Classroom Policies

- Students should minimize unscheduled personal breaks. The learning environment improves when disruptions are limited.
- Students are fully prepared for each class. Much of the learning in the GK EMBA program takes place during classroom discussions. When students are not prepared they cannot contribute to the overall learning process. This affects not only the individual, but their peers who count on them, as well.
- Students respect the views and opinions of their colleagues. Disagreement and debate are encouraged. Intolerance for the views of others is unacceptable.
- Laptops are closed and put away unless instructed otherwise. When students are surfing the web, responding to e-mail, instant messaging each other, and otherwise not devoting their full attention to the topic at hand they are doing themselves and their peers a major disservice. Those around them face additional distraction. Fellow students cannot benefit from the insights of the students who are not engaged.
- Phones and wireless devices are turned off. We've all heard the annoying ringing in the middle of a meeting. Not only is it not professional, it cuts off the flow of discussion when the search for the offender begins. When a true need to communicate with someone outside of class exists (e.g., for some medical need) please inform the professor prior to class.

Academic Dishonesty

I have no tolerance for acts of academic dishonesty. Such acts damage the reputation of the school and the degree and demean the honest efforts of the majority of students. The minimum penalty for an act of academic dishonesty will be a zero for that assignment.

New Course Proposal: EMBA 6025: Contemporary Issues about Chinese Financial Markets and Institutions

1. **Program:** Kellogg-Schulich Executive MBA
2. **Course Number:** EMBA 6025
3. **Credit Value:** 2.0
4. **Long Course Title:** Contemporary Issues about Chinese Financial Markets and Institutions
5. **Short Course Title:** Chinese Financial Markets and Institutions
6. **Effective Session:** Fall 2017
7. **Calendar (Short) Course Description:**

This course is designed to discuss various contemporary issues related to the Chinese financial markets and institutions. It aims to enhance students' understanding of the Chinese financial system and prepare them for more advanced discussions about the Chinese economy and management. The course is based on the discussion of multiple case studies with students expected to contribute regularly.
8. **Expanded Course Description:**

This course is designed to discuss various contemporary issues related to the Chinese financial markets and institutions. It aims to enhance students' understanding of the Chinese financial system and prepare them for more advanced discussions about the Chinese economy and management. The course is based on multiple case studies covering five main topics: (i) the challenges and opportunities of foreign direct investment (FDI) into China; (ii) the interaction of corporate financial strategies and overall business strategies from an emerging perspective; (iii) capital raising activities for both high growth and established, but underperforming businesses; (iv) mergers and acquisitions (M&A) within China; and (v) cross-border M&A. Students are expected to prepare all cases based on the assignment questions and contribute regularly to classroom discussions.
9. **Rationale:**

China is a rapidly growing emerging economy with quickly developing consumer markets, offering many opportunities for foreign companies to invest and operate there. Such an investment requires a solid understanding of how the financial markets and institutions work in China so as to secure local financing or carry out cross-border transactions. It will also help to understand how Chinese companies competing both locally and globally finance themselves. Our students should be well prepared to take this course based on the corporate finance and introductory M&A courses they complete just beforehand in their Toronto-based part of the EMBA program.
10. **Evaluation:**

Assessment for this course is based on final, individual assignment about a topic selected by the instructor at the end of the course.
11. **Integrated Courses:**

This course is not integrated.

12. Crosslisted Courses:

This course is not crosslisted.

13. Faculty Resources:

This course will be taught by Professor Li Jin, who is Chaired Professor of Finance at the Guanghua School of Management in Peking University. He is the Director of the National Centre for Financial Research at Peking University, as well as the Director of the Management Case Research Centre at Peking University and Associate Dean at Guanghua School of Management. Professor Jin obtained an MA in Economics from Rutgers University and a PhD in Finance from the Sloan School of Management at the Massachusetts Institute of Technology. He currently also serves as Professor of Finance at Oxford University's Saïd Business School, and is a member of Oxford University China Centre. And he is the Founding Academic Director of the Harvard-Oxford-Peking University Family Business and Private Sector Business Program. An internationally recognized expert of corporate governance, he has been serving as the director and senior advisor of many academic and practitioner organizations around the world, and the independent or outside director for many listed and non-listed firms as well as fund management companies in China and abroad. Professor Jin has published numerous articles in leading academic journals including the *Journal of Finance*, the *Journal of Financial Economics*, and the *Review of Financial Studies*. He has received numerous best paper and research awards and is a recipient of the prestigious "thousand talent plan" recognition of the Chinese central government.

14. Physical Resources:

This course will be offered annually during a global elective week at the Shanghai campus of our partner within the global Kellogg, the Guanghua School of Management at Peking University, which will provide all the necessary physical resources before, during and after the course. These resources can be supplemented with the resources of York University Library, should this prove necessary (see below).

15. Bibliography and Library Statement:

All required readings will be made available to participants by the Guanghua School of Management before and during the course. Further readings can be accessed remotely via the York University library, which also allows electronic access to relevant readings and toolkits.

MEMORANDUM
Peter F. Bronfman Business Library

SUBJECT: Library Statement for Kellogg-Schulich EMBA
Course: EMBA 6025
Contemporary Issues about Chinese Financial Markets and Institutions

FROM: Xuemei Li, Business Librarian, Peter F. Bronfman Business Library.

DATE: May 25th, 2017

This is a course offered to the Guanghai-Kellogg EMBA program, designed to discuss various contemporary issues related to the Chinese financial markets and institutions. This course uses case discussions. Each student is expected to contribute regularly to classroom discussion. No textbook or further readings are requested.

The library offers additional relevant resources on topics explored in this course. A wide range of books are available with relevant Library of Congress subject headings including but not limited to: “consolidation and merger of corporations,” “corporate reorganization,” “international business enterprises>>finance,” and “developing countries>>economic policy”. A key e-book platform of relevance is *Books 24x7*. Streaming videos are also available on the topic of mergers and acquisitions and emerging markets especially through the *Films on Demand*, and *Kanopy Streaming* platforms.

In addition, York University Libraries provide KSEMBA students with access to a range of databases, containing media and journal articles. Relevant databases include *Factiva*, *Proquest Business*, *Business Source Complete* and *Lexis Nexis Academic*. Students can use these databases to identify articles on themes taught in this course to supplement assigned course materials. In particular, *Factiva* and *Lexis Nexis Academic* are relevant to this course for identifying individual M&A cases.

Students can also consult the library’s research guides: www.library.yorku.ca/web/bbl/guides for resources of relevance to this course. The guides to “Finding Business Articles” and “Finance” (containing a section on corporate change and ownership) are especially recommended. In addition, BRYT (Business Research at York Toolkit) – bryt.library.yorku.ca/ - is recommended as it offers short videos and real-time database walkthroughs which guide students through conducting both company and articles research.

Assistance with information resources is available by email, by telephone, and by chat reference via an IM service.

Contemporary Issues about Chinese Financial Markets and Institutions

Instructor: Li Jin

Semester: Fall 2017

Credit Hour: 15

Prerequisite: 1

Program: Guanghai-Kellogg EMBA

Time: November 8-13, 2017

Credits: 1

Location: Shanghai

Contact Information:

Office: Bldg 2, Rm 418

Tel: 62767157

Email: ljin@gsm.pku.edu.cn

Office Hours: by appointments only

Brief Course Description

This is a course offered to the Guanghai-Kellogg EMBA program, designed to discuss various contemporary issues related to the Chinese financial markets and institutions. Professor JIN, Li will teach this course. The course will offer select topics through mostly case discussions.

Course Objectives

To enhance student understanding of Chinese financial system, and prepare for more advanced discussions about Chinese economy and management.

Detailed Course Plan

TOPIC 1: Challenges and Opportunities of FDI into China

Case 1

[Shenzhen Development Bank](#), HBS 9-210-020 ®

Assignment Questions:

1. What's the investment thesis for Newbridge/TPG's investment in SDB?
2. What do you think about the offer price given by Newbridge?
3. What should Shan Weijian do now?

Case 2

Stock Reform of Shenzhen Development Bank, HBS 9-211-080 ®

Assignment Questions:

1. How would the shareholder reform solve corporate governance problems? What potential problem might it create?
2. From the perspective of the controlling shareholder (TPG/Newbridge), what should be a reasonable solution to the problem imposed by the non-tradable share reform?
3. From the perspective of the existing tradable shareholders, who need to be convinced in order to vote in favour of the plan, what should be a reasonable demand?
4. What should or should not the Chinese government do to intervene in this?
5. In a place where things develop very fast, how do investors protect their own

TOPIC 2: Interaction of Corporate Financial Strategies and Overall Business Strategies: the EM Perspective

Case 1

Gome: Going Public, HBS 9-208-001 ®

Assignment Questions

1. What is Gome? How does it make money?
2. Does Gome need money?
3. Why is Gome considering listing?
4. Where should it list? How should it list?

Case 2

Gome: Bidding for China Paradise, HBS 9-208-002 ®

Assignment Questions

1. Discuss the pros and cons of using M&A to grow in this market;
2. How does the firms' financial decision and business strategy interact?
3. What are the roles of PEVC investors in the corporate development?

TOPIC 3: Capital Raising Activities

Sub-Topic 1: Capital Raising by High Growth Businesses

Case

Fu Ji Food and Catering, HBS 9-208-004 ®

Assignment Questions:

1. How should we value a fast growing company with severe cash flow shortfall?
2. How does the fact that this company is in a capital-constrained environment affect the decision?
3. How is convertible bond used and what problems is it trying to solve?

Sub-Topic 2: Capital Raising by well-established but underperforming businesses

Case

The IPO of Agricultural Bank of China (ABC) (A), HBS 9-712-006 ®

The IPO of Agricultural Bank of China (ABC) (B), HBS 9-712-008, to be handed out in class

Assignment Questions:

1. How to conduct the IPO of a well-established yet underperforming business?
2. How to do it against the backdrop of rapidly deteriorating IPO market?

TOPIC 4: M&A within China

Cases

Framedia (A), HBS 9-207-057 ®

Framedia (B), HBS 9-207-058, to be handed out in class

Assignment Questions:

1. How does M&A add value in China?
2. What are the roles of financial investors in developing the new industry?
3. How to execute the M&A transaction?
4. How do the sellers and buyers negotiate the price?

TOPIC 5: Cross-Border M&A

Case 1

Hony, CIFA, and Zoomlion: Creating Value and Strategic Choices in a Dynamic

Market, HBS 9-811-032 ®

Assignment Questions:

1. What are the risks of pursuing the CIFA acquisition? What are the potential benefits?
2. How is investing in Zoomlion's acquisition of CIFA different from investing in Zoomlion itself? Does this pose fewer or more risks for Hony?
3. What is the valuation of CIFA? Please use cash flows and cost of capital data from the case. You may wish to assume that CIFA will grow at 5% per year through 2012 and 2% per year thereafter.
4. Should Hony participate in the Zoomlion acquisition?

Case 2

[Sany Acquisition of Putzmeister](#) (Li Jin, Yan Tang and Yiwei Chen, Peking University Guanghua School of Management Case) ®

Assignment Questions:

1. What might be behind the recent events of acquisitions of mature market firms by emerging market firms?
2. Do you think these deals will be viable in the longer run? Why?
3. How does the value get created or destroyed in cross-border M&A

Teaching Methods

This course uses case discussions. Each student is expected to contribute regularly to classroom discussion.

IT tools to be used in the classroom (if any)

video player (with sufficient sound volume), PPT equipment.

Textbooks

none.

References and Readings

Please refer to the case list above.

Videos, CD-ROMs and other adjunct learning resources used

video clips will be used when appropriate.

Rules students must follow

Attendance is crucial in the learning process. Email notification to the instructor has to be given for any class you are going to miss. A written answer to assignment questions has to be submitted BEFORE the class, for any class that you will miss (regardless of whether the absence is excused or not).

Course Assessment

Students will write a final assignment about a topic selected by the instructor at the end of the course.

Schulich School of Business

Memorandum

To: Faculty Council, Schulich School of Business
From: Dr. Shanker Trivedi, Associate Professor of Accounting, Schulich School of Business.
Date: December 21, 2017
Re: Proposed Research Component to be included in ACTG 6160 3.00, Advanced Financial Accounting.

Motion:

That the Faculty Council approve the addition of a research component to the course: ACTG 6160 3.00, Advanced Financial accounting.

Rationale:

The proposed change to the Actg 6160 3.00 course will require students to participate in two experiments based on accounting/tax topics, and will require the students to apply their prior accounting, business and tax knowledge in the context of the experiments. Thus, the same learning objectives that are sought to be achieved by the use of the cases will now also be achieved by the students participating in the experiments. The requirement to participate in the two experiments was already present in the course outline for previous semesters; however, approval for such an inclusion is being sought now via this course change proposal document following the requirement under Schulich's *Guidelines and Policy on using Courses to Recruit Students as Research Subjects*.

Course Change Proposal Template

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

E.g., Schulich MBA Program

2. Course Number and Credit Value

ACTG 6160 3.00

3. Course Title

a) Long Course Title

Advanced Financial Accounting

b) Short Course Title

Advanced Financial Accounting

4. Existing Pre-requisites/Co-Requisites

SB/ACTG 6120.030. NOTE: Open only to MAcc students

5. Type of Course Change (indicate all that apply)

<input type="checkbox"/>	in course number
<input type="checkbox"/>	in credit value (provide course outline)
<input type="checkbox"/>	in course title (provide course outline; short course titles may be a maximum of 40 characters, including punctuation and spaces)
<input type="checkbox"/>	in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)
<input type="checkbox"/>	in learning objectives/outcomes (please append the program's existing learning outcomes as a separate document)
<input type="checkbox"/>	in integration (provide statement of approval from other program)
<input type="checkbox"/>	in cross-listing (provide statement of approval from other program)
<input type="checkbox"/>	in pre/co-requisite
<input type="checkbox"/>	expire course
<input checked="" type="checkbox"/>	other (please specify) – integration of mandatory research participation/project

6. Effective Session of Proposed Change(s)

Winter 2018

7. Academic Rationale

Indicate how the proposed change will contribute to the academic objectives of the course/program. Please provide a description of the amended learning outcomes/objects for the course, if applicable. Additionally, please append the graduate program's existing learning outcomes as a separate document.

Advanced Financial Accounting is the final financial accounting course that students in the MAcc program take. In this course, students not only learn new and advanced accounting topics such as consolidation, accounting for foreign exchange transactions and not-for-profits, they also apply concepts learnt in earlier accounting, business, and tax courses to multi-competency cases they have to submit as part of their homework assignments. The final exam for the course also tests the ability of students to apply such concepts to mini-case cases. The proposed change will require students to

participate in two experiments each worth 1.5%. These experiments will be on accounting/tax topics, and will require the students to apply their prior accounting, business, tax knowledge in the context of experiments. Thus, the same learning objectives that are sought to be achieved by the use of the cases will now be achieved by the students participating in the experiments.

8. Proposed Course Information

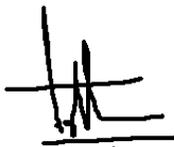
Please insert approved course information on the left, and proposed course information on the right. Please clearly and visibly indicate how course information has been changed using strikethrough (left column), bold, underlining, colours, etc. (right column).

Existing Course Information (Change from)	Proposed Course Information (Change to)
<p>The final course in the three-course financial accounting core, this course emphasizes accounting for international activities and inter-corporate investments. The application of accounting principles to case situations in specialized industries and non-profit organizations is also considered.</p> <p>Note: Not available to exchange students visiting Schulich. Prerequisite: <i>SB/ACTG 6120.030</i>.</p>	<p>The final course in the three-course financial accounting core, this course emphasizes accounting for international activities and inter-corporate investments. The application of accounting principles to case situations in specialized industries and non-profit organizations is also considered.</p> <p>Note: Not available to exchange students visiting Schulich. Prerequisite: <i>SB/ACTG 6120.030</i>.</p>

9. Consultation

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

Originator



Signature

Viswanath U. Trivedi
Name

October 30, 2017

Date

Accounting
Area or Specialization

Approvals:

Area or Specialization

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

 _____ Signature	14 November 2017 _____ Date
Cameron Graham _____ Name	Accounting _____ Area or Specialization

Degree Program

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

<i>Ashwin Joshi</i> _____ Signature	December 16, 2017 _____ Date
Ashwin Joshi _____ Name of Program Director	MBA Program _____ Program

Program Committee

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

<i>Markus Biehl</i> _____ Signature	January 15, 2018 _____ Date
Markus Biehl _____ Name of Committee Chair	MPC-PCC _____ 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.

ACTG 6160 Section Q 3.0: Advanced Financial Accounting



Course Outline

Winter 2018

Mondays(s) 2:30 p.m. to 5:30 p.m., beginning January 8 in E118 SSB

<p>Dr. Shanker Trivedi 416-736-5066 S344C Seymour Schulich Building strivedi@schulich.yorku.ca Office hours: Mon: 11:30 a.m. -2:30 p.m.</p>	<p>Faculty Secretary Mary Rizzo (416)736-5066 S344K Seymour Schulich Building mrizzo@schulich.yorku.ca</p>
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Shanker Trivedi's research interests are in financial accounting, the accounting profession, and tax. His teaching interests are in contemporary issues in accounting and in financial accounting. He has taught at all levels; bachelors, masters, and doctoral. Shanker has published in journals such as *Experimental Economics*, and *Accounting Organizations and Society*, among others. He is also the co-author of the 6th and 7th editions of *Advanced Financial Accounting*. He has served on many committees within and outside the university setting.

Brief Description

The final course in the three-course financial accounting core, this course emphasizes accounting for international activities and inter-corporate investments. The application of accounting principles to case situations in specialized industries and non-profit organizations is also considered.

Prerequisite[s] / Co-requisite[s]

SB/ACTG 6120.030

NOTE: Open only to MAcc students

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Class-by-Class Syllabus & Quick Reference: Summary of Classes, Activities and Deliverables.....	7

Course Learning Outcomes

In this course we will focus on advanced topics in accounting. Specifically, we will cover three broad areas of accounting: i) Intercorporate investments, business combinations and consolidations, ii) foreign currency transactions and operations, and iii) not-for-profits and public sector financial reporting. By nature such topics are highly theoretical and technical.

This course is of primary interest to students who intend to pursue a career in professional accounting. In this course, we will aim to hone your ability to recognize and resolve recording and reporting highly technical accounting issues keeping in mind the preparers and many users of accounting. We will emphasize relevant theory which will help you exercise your professional judgement in unique situations and technical application of the current accounting rules for presenting these advanced accounting topics.

Deliverables at a Glance

The learning of advanced financial accounting occurs through both a conscientious preparation for course lectures and the active participation in classroom activities. Class lectures will consist of a review of key concepts as well as a variety of other learning activities.

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

Assignment/Task	Quantity	% Weight	Total %	Author
Written homework assignments	3	2.0	6.0	In groups of 3-4
Participation in Experiment/Write-up	2	1.5	3.0	Individual
Case write up	1	15	15.0	In groups of 3-4
Class contribution	11	0.5	5.5	Individual
Midterm exam	1	25	25	Individual
Final exam	1	45.5	45.5	Individual
			100%	

For details, see “Description and Evaluation of Written Assignments/Projects/Class Contribution and Exam[s]” (p. 5).

Course Material

Readings for this course include:

1. Advanced Financial Accounting, Thomas H. Beechy, V. Umashanker Trivedi, and Kenneth MacAulay, 7th Edition, Pearson Canada. (available for purchase from the York University bookstore)
2. Course material placed on the Course Materials Database (CMD)/Canvas.

Recommended Reference Materials

IFRS and CICA Handbook (You should be able to access them online via the library).

Note that the textbook publisher provides students with access to a companion website to the textbook which includes additional materials.

Course Materials Database/Canvas

Each section of a Schulich-based course has a Canvas page/CMD created within Lotus Notes. This Canvas page/CMD includes some important general information for Schulich students.

The Canvas page/CMD is used as a central bulletin board on which items will be electronically posted. Students have read-only access to the Canvas Page/CMD. **You are expected to check the Canvas page/CMD at least twice**

each week. Any announcements that need to be made to the entire class will be posted, along with all lecture notes, assignments, and solutions if any.

In the past, students have found it very helpful to have common questions and answers posted to the Canvas page/CMD. When I receive a question from a student by e-mail, I will respond to it by e-mail. In addition, if the question is of likely interest to other students, I will extract the question from the e-mail (i.e. to make it anonymous) and post both the question and my response to it on the Canvas page/CMD.

Contacting the Instructor

The best way to contact me is by e-mail. If you would like to meet with me, you can email me to set up an appointment. The time before or after regular class will work as well.

Student Preparation for Class and Class Participation: Expectations

While the material covered in this class is highly theoretic and technical the solutions are case specific. Further, mere technical knowledge will become fast outdated in the face of the rapid changes mentioned above. Rote learning will not suffice in these circumstances. Therefore, we will continue to build on the critical thinking skills you have developed, and the case approach of learning accounting you have encountered, in your earlier accounting courses at Schulich. Specifically, this course presumes that students have acquired the conceptual base of Accounting 3110 and 3120 (or their equivalent at the MBA level) and are prepared to deal with more complex technical issues.

The material that is required to be mastered in this class is vast and therefore impossible to cover completely in the limited class time we have. **Therefore, students are expected to be able to study and comprehend most of the material on their own.** Class time will be focused on the more complex aspects of the technical material and the discussion of the assigned problems and cases. **Examinations, however, will cover all of the assigned material, including the articles assigned for reading and any material handed out in class. Examinations will not be restricted to the material explicitly discussed in class.**

Class Contribution

You are expected to be prepared to discuss the topics and challenge and question the analyses of the lecture material presented. **You are also expected to attend all classes for the entire class in order to earn your contribution marks. YOU NEED TO BRING YOUR NAME CARD TO ENSURE THAT YOU GET YOUR CONTRIBUTION MARKS.**

Contribution is an essential component in the overall education experience of this advanced level course. Contribution takes many forms: asking informed questions in class, making intelligent comments, reading the case or homework problems and being prepared to discuss the issues, actively listening to your peers and working with others. Please remember that quantity is no substitute for quality.

There will be ample opportunity to contribute to the class. The format of the in-class discussions of topics may take a variety of forms including: group analysis of single case issues during class, presentation of issues, leading discussions of the case issues.

Ground Rules

- **This is a challenging course. Therefore, come fully prepared for each class.** Specifically, read through the assigned material and work out the assigned questions/cases/problems before each class session. Class time will be reserved for answering students' questions and for going through the assigned material.
- Be prepared to constructively engage in the class discussions. Think about what is being said and feel free to

voice your agreement or disagreement with it. However, do so professionally and courteously.

- The Canvas page/CMD will be used extensively to distribute handouts. If handouts are distributed in class, they will be done **ONLY ONCE**. Neither the instructor nor the secretary will keep copies of previous weeks' handouts. If you expect not to be in class on a particular day arrange to have one of your classmates pick up the handouts distributed on that day.
- Please bring your name card and display it for every class.
- Be courteous in class. Arrive on time. Do not leave in the middle of the class, unless you have obtained prior permission to do so. Do not eat or drink ANYTHING in class. Do not read newspapers or surf the web while in class. Laptops should be used solely for the purpose of this class, Advanced Financial Accounting. Do not disturb others by chatting. Make sure that your cell phones are turned off for the duration of each class.

Written Assignments/Projects and Exam[s]: Descriptions

Hand in Assignments

There are two types of hand in assignments – i) homework assignments, and ii) a case write-up, both done in groups of **THREE/FOUR**. **YOU HAVE TO FOLLOW IFRS, UNLESS TOLD OTHERWISE EXPLICITLY, WHEN COMPLETING AND SUBMITTING ALL ASSIGNMENTS. ONE ASSIGNMENT PER GROUP HAS TO BE SUBMITTED ELECTRONICALLY VIA CANVAS ONLY. ASSIGNMENTS IN HARD COPY WILL NOT BE ACCEPTED.**

Written assignments are due at the start of the class. Late assignments will not be accepted since we may take these up in class. Please keep a copy for yourself. All assignments must be typed, double-spaced, use 11 point font, written on only one side of the page with 1 inch margins. This is important so that your answers are easy to read and there is room for the marker's comments. All assignments will be graded and returned as soon as possible (within one or two weeks usually). Common error sheets will be provided to indicate general errors. Logic and assumptions must be stated where applicable. As a variety of directive and non-directive questions are used, students must use judgment as to the style of response that seems appropriate.

Written assignments provide an opportunity to apply the skills being taught in the course and are useful for monitoring progress and for obtaining personal feedback. They are there to prepare you for the midterm and final exams.

Faxed assignments or e-mailed assignments will not be accepted under any circumstance. MISSED ASSIGNMENTS CANNOT BE MADE UP NOR CAN THEIR WEIGHT BE TRANSFERRED TO OTHER COMPONENTS OF THE COURSE.

Written Homework Assignments

There will be **THREE** written assignments counting towards 6% of your final grade at 2% each. Each assignment can have a maximum length of 8 pages excluding attachments. If the assignment includes a case, the case cannot take up more than 6 of the 8 pages. You have to follow the Schulich case method while providing your answer(s) to the cases in these assignments. Please see *Quick Reference: Summary of Classes, Activities and Deliverables* for due dates.

Case Write-up

This group assignment, again done in groups of **THREE/FOUR**, will allow you to apply theoretical and technical knowledge to accounting related issues in the real world/case type situations. For the case you may be **required to use the recent financial statements of a public company reporting under IFRS**. The case write up will make up 15% of your grade and is due at the beginning of class on March the 19th. Further guidelines for the case write-up will be posted to the CMD.

Participation in Experiment/Write-up

The two research participation requirements worth 1.5% each involve your possible participation in two separate research studies each lasting around an hour. These studies have been approved by the Human Participants Review Committee of York University. During the course of the term you will be given more information about each study and how you can participate. You may be paid for your participation based on decisions you and or others may make in the experiment. **Your participation in the experiment is completely voluntary.** If no study is scheduled this semester (or alternatively you choose not to participate), you will be required (can opt) to write a short paper (one paper per study not conducted or participated in) of around 500-1,000 words (1.5-2 to 3-4 pages), depending on the length of the experiment, on a course related topic **decided upon after suitable discussion with the instructor.** Short papers evidencing reasonable effort will be awarded the full 1.5% of the marks allocated to them. **Note that in the case where no experiment(s) is conducted or you opt not to participate in the experiment(s) AND you choose not to submit the short papers required as the alternatives, you will not earn the 1.5% allocated to each of the two experiments.** Research is an important facet of the university's objectives of both producing and imparting knowledge. Participation in research is an important way of learning more about the methods and theory behind knowledge production in general as well as the specific research topic at hand. **Additionally, participating in such experiments provides a valuable experiential learning opportunity to the students, since they will be applying accounting, business, and tax concepts either as buyers or sellers in markets, or as economic decision makers making use of these concepts.** Hence, the requirement to participate in research studies is an integral component of various courses in Schulich, spanning areas such as Marketing, Organizational Behavior, and Accounting.

Class Participation

It is your responsibility to ensure that you take an active role in the class. The grading for class contribution in each session is as follows:

Grade	Contribution
0	Does not show up for class
2.00	Attends class but contributes nothing or very little
2.75	Contributes to the discussion - most of the contributions are not highly original but demonstrate basic understanding of the case or material - i.e. summarizes case facts or asks questions for clarification and is usually prepared, having read the cases before the class
4.00	Makes a significant contribution to the class by making 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 cases prior to class, shares in class presentations, contributes to in-class group work

Absence from class will mean a zero on your participation points for that day unless such absence is because of medical reasons (you will have to submit a supporting doctor's note), or because of Schulich sponsored/related events (again you need to submit supporting documentation). No allowance will be made for any other reason, therefore, please do not ask me for it.

Mid-term and Final Examinations

Materials eligible for examinations include all assigned readings, handout material, class discussions, class discussion questions, lectures, and homework assignments. Examinations may cover material taken up to and including the previous class.

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

Masters Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, elective courses are expected to have a mean grade between 5.2 and 6.2.

The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades. Conversions within a course are at the discretion of the instructor. For more details on the index, grading policy, and grade point average (GPA) requirements, consult your student handbook.

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

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

Exams (Absence from)

Mid-term: Students who miss a mid-term examination must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file. If a midterm is missed based on an acceptable (refer to Student Services guidelines) documented reason your midterm mark will be allocated to the final examination i.e. you will write the final exam for the combined midterm and final exam marks.

Final. Within 24 hours of missing a final examination, students must contact the Director of Student Services, at (416) 736-5060 and must also contact their course instructor. Formal, original documentation regarding the reason for missing the exam must be submitted to the Director of Student Services, (SSB Room W262) within 48 hours of missing the final exam. Students who miss a final exam due to illness must have their doctor complete an "Attending Physician's Statement." For a copy of this document, visit <http://www.registrar.yorku.ca/pdf/attending-physicians-statement.pdf>.

Quick Reference: Summary of Classes, Activities and Deliverables

The list on the following pages of lecture topics and readings indicates the material to be read, reviewed and/or prepared for the various class sessions. If any changes in this schedule become necessary, notifications will be posted in the course CMD, and where such changes need to be announced between class sessions, an email will be sent to students' Lotus Notes email accounts, notifying them of the change.

Week	BTM Readings	IFRS Suggested References	Topic and CMD Suggested Readings	Assigned Problems & Cases for class discussion and take up	Assignment Due
1. Jan. 8	Chapters 1 and 2	<ul style="list-style-type: none"> IFRS 1, IFRS 9, IAS 28, IFRS 11 Joint Arrangements Accounting Standards for Private Enterprises 	Setting the Stage Intercorporate Equity Investments: An Introduction	Case 2-2, P2-4, P2-8, P2-9	
2. Jan. 15	Chapter 2 continued, and online Appendix 2A Chapter 3	<ul style="list-style-type: none"> IFRS 3 	Intercorporate Equity Investments: An Introduction Business Combinations	P2A-3, P2A-5 Case 3-3, P3-2, P3-3, P3-6, P3-7	
3. Jan. 22	Chapter 3 continued, and online Appendix 3A Chapter 4	<ul style="list-style-type: none"> IFRS 3 IAS 27 IFRS 10 	Business Combinations Wholly Owned Subsidiaries: Reporting Subsequent to Acquisition	P4-1, P4-2, P4-3, P4-6, P4-7, P4-8	
4. Jan. 29	Chapter 4 continued Chapter 5 including appendices 5A and 5B online		Wholly Owned Subsidiaries: Reporting Subsequent to Acquisition Consolidation of Non-Wholly Owned Subsidiaries	P4-1, P4-2, P4-3, P4-6, P4-7, P4-8 P5-1, P5-2, P5-3, P5-7, P5-10, P5-12	Assignment #1 TBA
5. Feb. 5	Chapter 5 including appendices 5A and 5B online, continued		Consolidation of Non-Wholly Owned Subsidiaries	P5-1, P5-2, P5-3, P5-10, P5-12	
6. Feb. 12	Midterm examination				
7. Feb. 26	Chapter 6		Take up of Midterm examination Subsequent-Year Consolidations: General Approach	Case 6-3, P6-2, P6-6, P6-17, P6-19	

Week	BTM Readings	IFRS Suggested References	Topic and CMD Suggested Readings	Assigned Problems & Cases for class discussion and take up	Assignment Due
8. Mar. 5	Chapter 6 continued Chapter 8	• IAS 21	Subsequent-Year Consolidations: General Approach Foreign Currency Transactions and Hedges	Case 6-3, P6-2, P6-6, P6-17, P6-19 Case 8-2, P8-4, P8-7, P8-14	Assignment #2 TBA
9. Mar. 12	Chapter 8	• IAS 21	Foreign Currency Transactions and Hedges	Case 8-2, P8-4, P8-7, P8-14	
10. Mar. 19	Chapter 9	• IAS 21	Reporting Foreign Operations	Case 9-2, 9-4, P9-3, P9-9	Case Write-up Due
11. Mar. 26	Chapter 9 continued Chapter 10	• CICA • S. 4400- S. 4470	Reporting Foreign Operations Financial Reporting for Non-Profit Organizations	Case 9-2, 9-4, P9-3, P9-9 Case 10-2, Case 10-6 P10-3, P10-6, P10-8	
12. Apr. 2	Chapter 10 Continued Chapter 11		Financial Reporting for Non-Profit Organizations Public Sector Financial Reporting Review	Case 10-2, Case 10-6 P10-3, P10-6, P10-8 Case 11-1, Case 11-2	Assignment #3 TBA
Apr. 7-16	Final Exam				

Schulich School of Business

Memorandum

To: Faculty Council, Schulich School of Business
From: Mona Afrouz, Instructor of Marketing, Schulich School of Business.
Date: December 14, 2017
Re: Proposed Pre-Requisites and Co-Requisite for MGMT 6300 3.00 Case Analysis and Presentation Skills.

Motion:

That the Faculty Council approve the following courses: ACTG5100, MGMT5150, MGMT5260, MKTG 5200, ORG5100 as pre- requisites; and SGMT 6000 as a co-requisite for MGMT 6300 3.00 Case Analysis and Presentation Skills

Rationale:

The proposed pre-requisites will ensure that students have the appropriate knowledge, understanding and some academic experiences using business analyses tools such as Porter's Five Forces, Value Net, SWOT, Marketing Mix, etc. Without this base and tool kit being introduced prior to taking MGMT 6300, it makes it difficult for students to understand how to effectively use the tools to analyze a case and build out recommendations.

Course Change Proposal

1. Program

Schulich MBA Program

2. Course Number and Credit Value

MGMT 6300 3.0

3. Course Title

a) Long Course Title

Case Analysis and Presentation Skills

b) Short Course Title

Case Analysis and Presentation Skills

4. Existing Pre-requisites/Co-Requisites

- Existing Pre-Requisites: NONE

-Existing Co-Requisites: NONE

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)
x	in pre/co-requisite
	expire course
	other (please specify)

6. Effective Session of Proposed Change(s)

- Summer 2018

7. Academic Rationale

- Proposed Pre-Requisites: ACTG5100; MGMT5150; MGMT5260; MKTG 5200; ORG5100

- Proposed Co-Requisite: SGMT 6000

- Rationale: These pre-requisites will ensure that students have the appropriate knowledge, understanding and some academic experiences using business analyses tools such as Porter's Five Forces, Value Net, SWOT, Marketing Mix, etc. Without this base and tool kit being introduced prior to taking MGMT 6300 it makes it difficult for students to understand how to effectively use the tools to analyze a case and build out recommendations.

8. 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)
No Pre-Requisites	Pre-Requisites: ACTG5100; MGMT5150; MGMT5260; MKTG 5200; ORG5100 Co-Requisite: SGMT 6000

9. Consultation

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

Originator

Mona Afrouz
Signature

December 16, 2017
Date

Mona Afrouz
Name

Marketing Area
Area or Specialization

Approvals:

Area or Specialization

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

Peter Darke
Signature

December 16, 2017
Date

Peter Darke
Name

Marketing Area
Area or Specialization

Degree Program

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

Course Outline

MGMT 6300X Winter 2018
Mondays, 7:00pm-10:00pm, beginning on January 8th, 2018
Schulich Building N108

Instructor

Ms. Mona Afrouz
Office: N304L, Seymour Schulich Building
mafrouz@schulich.yorku.ca
Office hours: by appointment

Assistant

Sheila Sinclair
Office: N304A
Phone: 416-650-8167
E-mail: ssinclair@schulich.yorku.ca

Mona Afrouz has been in various roles in the field of marketing for over 15 years. She's worked in various industries including semi-professional sports, consumer packaged goods, travel, and financial services. With a focus on strategy development and loyalty programs, she's been successful at navigating marketing on both the agency and client side. Throughout her Bachelors and MBA degrees, she's been involved in debating, public speaking, and strategy development. She has also been able to effectively compete and place in multiple case competitions.

Brief Description

This course is designed to give students the opportunity to practice and develop their analytical thinking and presentation skills. The key objective of the course is to train students to successfully participate in national and international case competitions. A secondary objective is to prepare students to successfully interview for management consulting positions. Second year MBA students who enjoy analyzing cases and delivering presentations are encouraged to take the course.

Pre-requisites/Co-requisites/Course Exclusions:

Proposed Pre-Requisites: ACTG5100; MGMT5150; MGMT5260; MKTG 5200; ORG5100

Proposed Co-Requisite: SGMT 6000

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Course Learning Outcomes

STRATEGIC THINKING SKILLS:

Strategic thinking skills allow business professionals to overcome critical challenges and seize on opportunities to create value for their organizations and be successful in their business careers.

These skills allow business professionals to address core questions that every organization faces such as: “How does a business create value and therefore make money? What factors prevent it from creating more value than it does now? What should it do to create more value?”

The development of a systematic way of thinking that enables you to recommend solutions to complex challenges and seize on opportunities that businesses face is a key objective of this course.

PRESENTATION SKILLS:

Effective presentation skills are an important component to career success for many MBA graduates and those skills become increasingly valuable for those aspiring to take on positions of leadership.

As part of a team, you will make at least 4 presentations in this course. At the end of each presentation I (and sometimes an external referee) will provide you with a detailed critique of both the content and style of your presentation. This iterative process is designed to enhance your presentation skills, learn how to concisely communicate your conclusions and effectively sell your ideas.

STRUCTURED THINKING SKILLS:

Structured thinking and frameworks allow business professionals to bring clarity and rigorous logic to the solving of strategic and complex business problems. Frameworks decompose problems into their composing drivers, help prioritize the key issues for analysis and identify potential solutions.

In this course, you will learn to apply structured thinking to problems either through the use of existing frameworks or the development of your own.

TEAMWORK SKILLS:

You will work in teams of 4-6 (depending on class size). I will assign team membership at random for each class. This is designed to give you exposure to various individuals and team climates. As a result, I expect that you will learn many lessons about how to work effectively in teams.

Deliverables at a Glance

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

Assignment/Task	Quantity	% Weight	Total %	Author
Individual Case Hand-In (class 5)	1	20%	20%	Individual
In-Class Group Case Presentations (classes 5-10)	2	15%	30%	Group
Final Group Case Presentation (class 12)	1	35%	35%	Group
Contribution to class discussion (throughout)	12	1.25%	15%	Individual
			100%	

For details, see “Written Assignments/Projects and Exam[s]: Descriptions” (p. 6) and “Evaluation ...” (p. 7).

Course Material

Course materials have been assembled into a course kit. These kits are available for purchase at the University bookstore. Every week, you should check the Session-by-Session Syllabus below for readings and their locations (see p. 3).

The *Course Materials Database (CMD)* has been created within Schulich's Lotus Notes. It contains general information for Schulich students and information and materials specific to this course. Check it frequently.

Student Preparation for Class and Class Participation: Expectations

Preparation. Articles and video material for each class will be completed or reviewed before the start of each class.

Class Participation (contribution). Students are expected to actively participate in all class and team exercises. A contribution evaluation will be graded every week.

Class-by-Class Syllabus

Each class begins with a lecture portion or guest presentation followed by a practical application exercise.

Topics, readings, and other preparations for every class are listed below.

Note: If any changes in this schedule become necessary, notifications will be posted on the course CMD, and when changes need to be announced between classes, an email will be sent to students' Lotus Notes email accounts, notifying them of the change.

January 8th Introduction / Approach to Case Analysis (I)
Week #1

January 15th Approach to Case Analysis (II)
Week #2 Read:
 ▪ Brief pre-class exercise (to be distributed)

January 22nd Case Analysis
Week #3 Prep:
 ▪ Case: eHarmony
 Mikolaj Jan Piskorski, Hanna Halaburda, Troy Smith

Read:
 ▪ What is Strategy? Michael E. Porter

January 29th Case Analysis & Presentations
Week #4 Teams will be randomly assigned at the beginning of the class. All teams will have one hour

to develop their presentation, to last a maximum of two minutes. Each team will select two members to present.

Prep:

- Case: Trouble Brews at Starbucks
Lauranne Buchanan, Carolyn J. Simmons

Read:

- Managing Brands for the Long Run: Effective Brand Reinforcement and Revitalization Strategies. Kevin Lane Keller

February 5th
Week #5

Group Case #1

Teams will be randomly assigned.

- 7:05 to 8:25 group work on the case
- 8:25 submit presentations in classroom (late submissions will be penalized)
- 8:25 to 8:40 break
- 8:40 to 9:30 in-class presentations (2 groups will be randomly chosen in each class)

Prep:

- Case: Product Team Cialis – Getting Ready to Market
Elie Ofek

Read:

- Principles of Value-Based Competition: Redefining Health Care (pp. 1-21)
Michael E. Porter, Elizabeth Olmsted Teisberg

Assignment Due:

- Individual Case Hand-In #1: Abercrombie and Fitch
Cameron Mahi, Gracie Boelsems and John Garrison

February 12th
Week #6

Group Case #2

Teams will be randomly assigned.

- 7:05 to 8:25 group work on the case
- 8:25 submit presentations in classroom (late submissions will be penalized)
- 8:25 to 8:40 break
- 8:40 to 9:30 in-class presentations (2 groups will be randomly chosen in each class)

Prep:

- Case: Clarke - Transformation for Environmental Sustainability
Chris Laszlo, Katey McCabe, Eric Ahearn and Indrajeet Ghatge

Read:

- Three Questions You Need to Ask About Your Brand.
Kevin Lane Keller, Brian Sternthal, Alice M. Tybout

February 19th
FAMILY DAY

NO CLASS

February 26th Group Case #3
Week #7 Teams will be randomly assigned.
- 7:05 to 8:25 group work on the case
- 8:25 submit presentations in classroom (late submissions will be penalized)
- 8:25 to 8:40 break
- 8:40 to 9:30 in-class presentations (2 groups will be randomly chosen in each class)

Prep:

- Case: Kodak (A)
Giovanni Gavetti, Rebecca Henderson and Simona Giorgi.

Read:

- The Determinants And Evaluation Of Merger Success
Marc J. Epstein

March 5th Group Case #4
Week #8 Teams will be randomly assigned.
- 7:05 to 8:25 group work on the case
- 8:25 submit presentations in classroom (late submissions will be penalized)
- 8:25 to 8:40 break
- 8:40 to 9:30 in-class presentations (2 groups will be randomly chosen in each class)

Prep:

- Case: Should Kellogg's Launch Gluten-Free Products in India?
Sandeep Puri, Mayank Rawat, Arjit Rawal, Akshay Nangia

Read:

- Defensive Marketing: How a Strong Incumbent Can Protect Its Position
John H. Roberts

March 12th Group Case #5
Week #9 Teams will be randomly assigned.
- 7:05 to 8:25 group work on the case
- 8:25 submit presentations in classroom (late submissions will be penalized)
- 8:25 to 8:40 break
- 8:40 to 9:30 in-class presentations (2 groups will be randomly chosen in each class)

Prep:

- Case: Nespresso and the U.S. Market
Edward Boon, Colin Campbell, Leyland Pitt

Read:

- Emerging Giants: Building World-Class Companies in Developing Countries
Tarun Khanna, Krishna G. Palepu

March 19th Group Case #6

Week #10 Teams will be randomly assigned.
 - 7:05 to 8:25 group work on the case
 - 8:25 submit presentations in classroom (late submissions will be penalized)
 - 8:25 to 8:40 break
 - 8:40 to 9:30 in-class presentations (2 groups will be randomly chosen in each class)

Prep:

- Case: Apple Inc. in 2010
David B. Yoffie, Renee Kim

Read:

- Blue Ocean Strategy
W. Chan Kim, Renee A. Mauborgne

March 26th Case Analysis

Week #11 Prep:

- Case: Haier: Taking a Chinese Company Global
Tarun Khanna, Ingrid Vargas, Krishna G. Palepu
- Case: Chartwell Technologies: Upping the Ante with Internet Poker
Michael Rouse, David Maslach

Assignment Due:

- Final Group Case Presentation Executive Summaries Due – Three Jobs and a Baby

April 2nd Final Group Case Presentations / Review, Course Evaluations and Wrap-Up

Week #12 Assignment Due:

- Final Group Case Presentations – Three Jobs and a Baby
-

Written Assignments/Projects and Exam[s]: Descriptions

Late submissions will be accepted however a single grade point will be deducted for each day that passes after the due date.

Please complete all presentations below with a minimum of 16-point font. The presentations MUST BE easy to read from the back of the classroom. No more than one slide per minute for the presentations (e.g., if the presentation is 10 minutes, you should not have more than 10 slides). A hard copy of the presentation must be submitted on the day of your presentation as well as a soft copy for reference. Appendices are acceptable for all presentations for Q&A sessions.

DUE DATES

February 5th
(Week 5)

Individual Case Hand-In

Each student will submit an individual case summary at the beginning of Class #5. Submissions are to be a **maximum length of one page**, typed, double-spaced, one inch margins throughout, no cover page, with a minimum 10-point font. ***Papers that do not meet these criteria will be returned without a grade and may not be resubmitted.***

The individual case hand-in should include:

DUE DATES

- Key problems / issues – concise statement identifying the fundamental strategic issue
- Sketch of structure/framework you used to decompose the problem and prioritize core issues (as an appendix - does not count towards page limit)
- Hypotheses – concise list of 2-3 likely solutions to the problem
- Analyses – brief description of the analyses you performed or would perform if data was available (actual analyses performed should be submitted as an appendix - does not count towards page limit)
- Options - list of viable alternatives that could be considered, measurement tool of how they apply
- Recommendations – concise summary of actions being recommended supported by analytical/logical evidence
- Risks & mitigants – summary of risks and mitigants of proposed solution

Value: 20%

February 5th to
March 19th
(Week 5-10)

In-Class Group Case Presentations

The course contains multiple sessions that involve case presentations. You will be randomly divided into groups at the start of each session. All groups will be assigned the same case. Two groups will be randomly selected to present in each class (10 minute presentation followed by a 5 minute question/answer session).

Value: 30%

March 26th – Part
1 (Week 11)
April 2nd – Part 2
(Week 12)

Final Group Case Presentation

Students will form groups of 5-6 students which are to be determined by the end of Class #7. All groups will be assigned the same case. Each group will meet outside of class time to prepare a case presentation (for which the executive summary – Part 1 - is due Week 11). The presentation will be delivered during week 12.

Value: 35%

Evaluation of Written Assignments/Projects and Exams

The initial classes in the course will focus on the introduction of approaches and frameworks that will allow you to successfully tackle business cases.

Subsequently, most classes will involve a short class lecture or discussion followed by the assignment of groups in which you will be asked to solve a business case contained in your course kit. In many of the classes you will be asked to present your group's recommendations and supporting rationale.

To prepare for many of the classes you will be asked to read a business case and reflect on what your recommendations would be to tackle the key strategic issue in the case. It is important that you come to each class having read the assigned case so that you can contribute to the class discussions and to your group's presentation.

All deliverables will be evaluated on your understanding of the case, use of principles taught in the class and overall presentation style (both on paper and physically).

Calculation of Course Grade

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

- A numerical grade of 94.0 percent or above is assigned a letter grade of "A+" (9)
- A numerical grade between 92.0 percent and 93.9 percent is assigned a letter grade of "A" (8)
- A numerical grade between 89.0 percent and 91.9 percent is assigned a letter grade of "A-" (7)
- A numerical grade between 86.0 percent and 88.9 percent is assigned a letter grade of "B+" (6)
- A numerical grade between 82.0 percent and 85.9 percent is assigned a letter grade of "B" (5)
- A numerical grade between 80.0 percent and 81.9 percent is assigned a letter grade of "B-" (4)
- A numerical grade between 75.0 percent and 79.9 percent is assigned a letter grade of "C+" (3)
- A numerical grade between 70.0 percent and 74.9 percent is assigned a letter grade of "C" (2)
- A numerical grade between 60.0 percent and 69.9 percent is assigned a letter grade of "C-" (1)
- A numerical grade between 0 percent and 59.9 percent is assigned a letter grade of "F"

The final grade for the course will be based on the following items weighted as indicated:

- Individual Case Hand-In: 20%
- In-Class Group Case Presentations: 30%
- Final Group Case Presentation: 35%
- Contribution to class discussion: 15%

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

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, elective courses are expected to have a mean grade between 5.2 and 6.2.

http://www.schulich.yorku.ca/client/schulich/schulich_lp4w_Ind_webstation.nsf/page/Enrolment+Grades+and+Convocation!OpenDocument#tabs-2

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

http://www.schulich.yorku.ca/client/schulich/schulich_lp4w_Ind_webstation.nsf/page/Academic+Honesty!OpenDocument

Accommodations. For accommodations sought due to exam conflicts, religious reasons, unavoidable absences or disabilities, please refer to the Student Handbook or contact Student Services.

For counseling & disability services, contact Student Services or see <http://www.yorku.ca/cds/>.

Quick Reference: Summary of Classes, Activities and Deliverables

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)	Written Preparation
1. January 8 th Introduction / Approach to Case Analysis (I)			
2. January 15 th Case Analysis	Brief pre-class exercise (to be distributed Jan 14 th)		
3. January 22 nd Case Analysis & Presentations		Case: eHarmony Read: What is Strategy?	
4. January 29 th Case Analysis & Presentations		Case: Trouble Brews at Starbucks Read: Managing Brands for the Long Run: Effective Brand Reinforcement and Revitalization Strategies	
5. February 5 th Group Case #1		Case: Product Team Cialis Read: Principles of Value-Based Competition: Redefining Health Care (pp. 1-21)	Individual Case Hand-In: Abercrombie and Fitch
6. February 12 th Group Case #2		Case: Clarke Read: Three Questions You Need to Ask About Your Brand	
NO CLASS February 19th Family Day			
7. February 26 th Group Case #3		Case: Kodak (A) Read: The Determinants And Evaluation Of Merger Success	
8. March 5 th Group Case #4		Case: Should Kellogg's Launch Gluten-Free Products in India? Read: Defensive Marketing: How a Strong Incumbent Can Protect Its Position	
9. March 12 th Group Case #5		Case: Nespresso and the U.S. Market Read: Emerging Giants: Building World-Class Companies in Developing Countries	
10. March 19 th Group Case #6		Case: Apple Inc. in 2010 Read: Blue Ocean Strategy	
11. March 26 th Case Analysis		Case: Haier: Taking a Chinese Company Global Case: Chartwell Technologies: Upping the Ante with Internet Poker	Final Group Case Presentation – Executive Summary Due Three Jobs and a Baby
12. April 2 nd Final Group Case Presentations			Final Group Case Presentations

**Schulich School of Business
Minutes of Faculty Council**

A regular meeting of the Schulich Faculty Council for the 2017-2018 academic year was held on Friday December 15th 2017 at 10:00am in room SSB X106.

In Attendance:

Chair: J. McKellar
Secretary: E. Rush

Voting Members of Faculty Council Present:

Senior Administration	D. Horváth, M. Biehl, M. Annisette, D. Matten, M. Szaki, M. Judd		
Student Council Reps	L. Maaskant (GBC)		
ACTG	C. Cho, C. Graham, S. Hsu, A. Mawani		
ARTM/NMLP			
BSUS			
ECON	I. Henriques		
FINE	Y. Larkin, L. Ng		
MKTG	B. Gainer, T. Noseworthy, E. Veresiu		
ORGS	K. Tasa		
OMIS	R. Irving		
PLCY	B. Eberlein, W. Sheremata		
PROP	A. Devine	OTHER:	

Voting Members of Faculty Council Absent:

P. Aulakh	A. deCarufel	R. Krishna (PhD)	C. Oliver	L. Thorne
E. Auster	Y. Deutsch	M. Kristal	Y. Pan	Y. Tian
K-H. Bae	A. Diamant	F. Lazar	T. Peridis	V. Trivedi
F. Baig (GBC)	D. Dimick (ret)	M. Levesque	E. Prisman	A. Tsang
T. Beechy (ret.)	M. Dong	S. Li	S. Qu	M. Valente
R. Belk	J. Everett	Z. Li	M. Rice	E. Waitzer
C. Bell	E. Fischer	B. Lyons	H. Rosin	S. Weiss
A. Bhanich-Supapol	M. Giesler	I. Macdonald (ret)	P. Sadorsky	T. Wesson
S. Bury (Library)	B. Graham (Alumni)	R. McClean (ret)	G. Saxton	E. Westney (ret)
A. Campbell	D. Johnston	J. McKellar	P. Shum	B. Wolf (ret)
M. Cao	M. Kamstra	C. McMillan	A. Simpson (GBC)	L. Wright
J. Chung	A. Kecskes	M. Milevsky	A.J. Sirsi	S. Yeomans
W. Cook (ret)	H. Kim	G. Morgan (ret)	J. Smithin	J. Zemans (ret)
P. Darke	M. Kipping	A. Muraca (UBS)	J. Tan	D. Zwick
J. Darroch	G. Kistruck	D. Neu		

Regrets, Leaves, Sabbaticals (*):

M. Farjoun*	R. Karambayya	E. Maynes (LOA)	M. Waller*
A. Joshi	A. Madhok	C. Pimentel-Lucas (UBS)	C. Zietsma (LOA)
K. Kanagaretnam*			

Non-Voting Members of Faculty Council Present

K. Gray	A. Mustapha	H. Sinker	F. Zandi
L. Hillcoat	S. Siddik	K. Welsby	J. MacKay

Non-Voting Members of Faculty Council Absent:

T. Anderson	A. Gravel	R. Lynn	J. Pinto
D. Bell	A. Harris	D. Mak	P. Pivato
M. Bhutani	R. Hines	A. Makooie	B. Remes
E. Caprioni	I. Holzinger	R. Mayer	N. Sutherland
M. Cernea	S. Hussain	T. Mcqueen	S. Tenn
G. Chen	J. Jeyakumaran	A. Middleton	E. Wang
T. D'Agostino	I. Kanga	R. Moy	D. Weitzner
P. Deonandan	L. Kharlip	S. Nahm	A. Welsh
D. Barret	L. Korhani	C. Niederwanger	D. Woticky
P. Dillon	M. Lefranc	M. Orlan	J. Wu
E. Farrell	P. Lyman	C. Partland	C. Zhuang

1. Welcome & Chair's Remarks

The Chair called the meeting to order and welcomed Council members. He noted that an additional last-minute item, remarks by Interim Provost & VP Academic Lisa Philipps re the decanal search, had been added to the agenda.

2. Dean's Remarks

Dean Horváth shared updates on past and upcoming events in the Schulich community:

- Former Schulich staff member Filomena Petrilla, Faculty Secretary for the Accounting area, passed away after a long battle with cancer. Filomena joined the school in October of 1995, where she supported the Accounting area for almost 20 years. Memorial services have been set for Sunday, December 10th, with the funeral taking place on Monday, December 11th. Filomena will be remembered as a devoted staff member and she will be deeply missed by everyone, including all of the faculty, staff and former students that she had worked with over the years.
- The 25th anniversary of the Erivan K. Haub program was celebrated on October 13th.
- Fall MBA convocation took place on October 18th. Ron Mok, President & CEO of the Ontario Teachers Pension Plan, received an honorary degree.
- The Perspectives lecture on October 24th was very well attended. This year's speaker was Jon Love, founder and Chief Executive Officer of KingSett Capital.
- The Dean travelled to Tel Aviv for a Kellogg partnership meeting and to celebrate the 25th anniversary of the Kellogg-Tel Aviv University partnership.
- The new format for Experience Schulich has been a success as the event on November 18th was very well attended.
- The Dean travelled to Mumbai to attend an Advisory Board meeting on November 21st. The Board is very engaged in the workings of the School.
- A launch for the book *Reimagining Capitalism* took place in Mumbai on November 22nd. Very strong panel discussions took place and a number of senior executives from the community attended. A separate *Reimagining Capitalism* book launch also took place in Hyderabad on November 23rd, with other panel discussions. The Dean is currently working towards another book on reimagining capitalism in emerging economies.

- The Dean also travelled to China for a launch of the book, which is currently being translated into Chinese languages. A second launch in China is being planned.
- The Bryden Awards took place on November 23rd. Three out of the four winners were Schulich graduates.
- The memorial services and celebration of life for Gordon Roberts took place on December 5th. Thanks to Ashwin Joshi and Sean Siddik for their work on this event.
- The Dean travelled to Chicago to attend a celebration of life for Don Jacobs, former Dean of the Kellogg School of Management.
- The Schulich Holiday Luncheon will take place today, along with a subway opening event. The Prime Minister and Premier are expected to attend the opening.
- A celebration of life for Wesley Cragg will take place on January 18th.

3. **PhD/GBC/UBS Initiatives:**

The UBS did not have a representative in attendance.

GBC VP Levin Maaskant indicated that the GBC has had a successful semester. He noted that the student body is very engaged this year, and the GBC team is hoping to carry this enthusiasm forward into the new Winter term. Unfortunately the GBC Treasurer recently resigned, but a new one has been found.

PhD Student Association representative Ramya Krishna provided a summary of recent accomplishments by PhD students. She noted the following over the past year:

Job Placements

- a. Angelique Shantz as Assistant Professor of Strategic Management and Organization at Alberta Business School, University of Alberta
- b. Aurora Liu as Assistant Professor of Strategy at Isenberg School of Management, University of Massachusetts Amherst
- c. Shiu-Yik Au as Assistant Professor of Finance at Asper School of Business, University of Manitoba
- d. Yelin Zhang as Assistant Professor of Finance at School of Business Administration, Gonzaga University

Publications

- a. Shantz, A., Fischer, E., Liu, A., Levesque, M. Spoils from the Spoiled: Strategies for Entering Stigmatized Markets. *Journal of Management Studies* (Conditionally accepted)
- b. Rocha, Angela, Kury, Beatriz, Tomassini, R., & Velloso, Luciana (forthcoming). Strategic responses to environmental turbulence: A study of four Brazilian exporting clusters. *Journal of Regional Research*, 39.
- c. Suarez, Maribel, & Velloso, Luciana (2017). Social representation of cigarettes in Brazilian popular culture. *Revista Interdisciplinar de Marketing*, 7(1), 26-41.

Scholarships

- a. Kam Phung, 3rd year PhD student in Organization Studies has been awarded the Vanier Canada Graduate Scholarship (total value: \$150,000 over 3 years) for his proposed research on "The business of modern slavery: Abolition and institutional resistance". His application was ranked first among 180 in the SSHRC division.

4. **PhD Program Committee**

- a) Motion: Proposal for Changes to the FINE Field of the PhD Program

L. Ng moved for approval of the motion. Seconded by M. Biehl. L. Ng provided the rationale for the proposal, indicating that it didn't involve any major changes to the field but rather a sequencing of the course material. All in favour. Motion carried.

5. Master Programs Committee / Programs Coordinating Committee

a) Motion: Discontinuation of the 3-year MBA/JD Option as of Summer 2018

M. Biehl moved for approval of the motion. Seconded by I. Henriques. M. Biehl explained that no students have taken this option for the past two years. Osgoode was consulted in preparing the motion and it is in full agreement with the discontinuation. The 4-year option of the program is still running. All in favour. Motion carried.

b) Motion: Course Evaluation Questions for Non-Lecture Format

M. Biehl moved for approval of the motion. Seconded by I. Henriques. M. Biehl explained that some of the existing course evaluation questions are not appropriate for certain course formats because of the differing nature of the course structures or content (such as a field experiences or course-based research projects). The proposed set of questions takes into consideration the particular nature of the educational experience. A question was raised as to who will select the most appropriate questions for a particular course. M. Biehl indicated that the instructor and the ADA will work together to do so. All in favour. Motion carried.

c) Motion: New Course Proposal for FINE 6710 3.00 – Crowdfunding

L. Ng moved this motion. D. Cumming seconded the motion, and provided a brief rationale. He indicated that crowdfunding is an important topic in entrepreneurial finance and there has been significant growth in research and its use in practice. He also indicated that there has been high demand from students for a course on this topic. All in favour. Motion carried.

d) Motion: New Course Proposal for SGMT 6200 3.00 – Strategy, Technology and Organization

M. Biehl moved for approval of the motion. Seconded by L. Maaskant. M. Biehl indicated that this course complements another course in the area on a similar topic. It will be offered in seminar style and students will be expected to do academic readings and discuss their insights. All in favour. Motion carried.

6. Remarks by Interim Provost and VP Academic Lisa Philipps re the Decanal Appointment Process

Interim Provost Lisa Philipps thanked the Council for welcoming her on short notice. She announced that the following four faculty members will serve on the Schulich Succession Planning committee: Preet Aulakh, Eileen Fischer, Dirk Matten, and Richard Irving. She also outlined the following next steps in the search process:

- A communication requesting written input from the community and providing further detail on the search process will soon be sent out.
- A series of consultation sessions with all constituent groups, including faculty, students, staff, and alumni, will be held beginning in mid-January so that those who prefer to share their feedback verbally may do so.
- Following these consultation sessions will be a quiet period in which the Succession Planning Committee will summarize its findings and prepare a report to share with Faculty Council for approval.

- Once the search procedures are in place, a Search Committee will begin drafting a position profile. It is hoped the position can be advertised in the spring, before summer holidays begin.
- In September 2018, the Committee will reconvene to the search with further information from the search consultant.

A number of questions and concerns were raised by Council members with regards to the search process and timeline.

The Provost indicated she looks forward to learning more about the School and community members' thoughts about its future, and thanked the Council for their time.

7. **Adjournment**

R. Irving moved for adjournment. Seconded by M. Annisette. All in favour. The meeting adjourned.

Consent Agenda

The following items were approved by consent:

- 1. BBA/iBBA Program Committee**
 - a) Curricular Changes:**
 1. ACTG 4200 3.00 – Contemporary Issues in Accounting (*integration of mandatory research participation*)
 2. FINE 4800 3.00 – Options, Futures & Other Derivative Securities (*pre-requisite*)
 3. PUBL 4000 3.00 – Business & Government (*title & description*)
- 2. EMBA Program Committee**
 - a) Curricular Changes:**
 1. EMBA 6050 2.00 – Mergers and Acquisitions (*title & description*)
 2. EMBA 6290 2.00 – Management in a Data Driven Environment (*title & description*)
 3. EMBA 6490 2.00 – IT Strategy and Digital Transformation (*title & description*)
 - b) New Course Proposals:**
 4. EMBA 6035 2.00 – Mergers, Acquisitions, and Other Reorganization Methods
 5. EMBA 6045 2.00 – Business-to-Business Marketing
 6. EMBA 6600 2.00 – Human and Machine Intelligence
- 3. Master Programs Committee/Programs Coordinating Committee**
 - a) Curricular Change:** FINE 6860 3.00 – Retirement Income Planning Models (*retirement*)
- 4. Nominating Committee**
 - a) Updates** to the 2017-2018 Nominating Slate
- 5. Minutes of the Last Meeting:** 2017.10.13