

**FACULTY COUNCIL  
SCHULICH SCHOOL OF BUSINESS**

A meeting of the Schulich Faculty Council for the 2018-2019 academic year will be held on Friday April 26<sup>th</sup> at 11:30am in SSB E111.

**AGENDA**

	<b>Page</b>
<b>1. Welcome &amp; Chair's Remarks</b>	
<b>2. Enquiries &amp; Communications</b>	
<b>a) Request for Input:</b> Draft Open Access Policy ( <i>Tom Loebel, Dean FGS and AVP Graduate; Andrea Kosavic, Associate Dean Libraries; Dany Savard, Director, Open Scholarship</i> ) <a href="https://www.library.yorku.ca/web/open/wp-content/uploads/sites/14/2018/01/DRAFT_OpenAccessPolicy.April2019.pdf">https://www.library.yorku.ca/web/open/wp-content/uploads/sites/14/2018/01/DRAFT_OpenAccessPolicy.April2019.pdf</a>	<b>3</b>
<b>b) Request for Input:</b> York University's Multi-Year Complement Renewal Strategy <a href="http://vpap.info.yorku.ca/ppy_protected/renewing-york-universitys-full-time-faculty-complement/">http://vpap.info.yorku.ca/ppy_protected/renewing-york-universitys-full-time-faculty-complement/</a>	<b>3</b>
<b>c) For Information:</b> Senate Synopsis (2019.03.28)	<b>4-8</b>
<b>3. Decanal Search</b>	
<b>a) Motion:</b> Continuing Membership on Schulich Dean Search Committee	<b>9-10</b>
<b>4. Dean's Remarks</b>	
<b>5. PHD/GBC/UBS Initiatives</b>	
<b>6. BBA/iBBA Program Committee</b>	
<b>a) Motion:</b> New Course Proposal for ORGS 4600 3.00 Diversity and Inclusion in Organizations ( <i>F. Zandi</i> )	<b>11-26</b>
<b>7. Master Programs Committee</b>	
<b>a) Motion:</b> New Course Proposal for MGMT 6150 3.00 Leadership Development for Accelerated Students: Leadership Skills for a Turbulent World (MBA) ( <i>I. Holzinger</i> )	<b>27-47</b>
<b>8. Adjournment</b>	

**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.*

	<b>Page</b>
<b>1. BBA/iBBA Program Committee</b>	
<b>a) Curricular Change:</b>	
1. ENTR 4400 3.00 Applied Entrepreneurship Field Study ( <i>course description</i> )	<b>48-60</b>

<b>2.</b>	<b>Master Program Committee</b>	
	a) <b>Minor Program Change:</b> Master of Accounting (MAcc) ( <i>admission requirement</i> )	<b>61-65</b>
	b) <b>Curricular Changes:</b>	
	1. PROP 6750 3.00 Financing Large Scale Infrastructure ( <i>co-requisite requirement</i> )	<b>66-77</b>
	2. IMBA 5002 1.50 Managerial Decisions Analysis ( <i>description change</i> )	<b>78-92</b>
	3. IMBA 5100 1.50 Integrative Management Experiences I ( <i>description change</i> )	<b>93-105</b>
	4. IMBA 5200 1.50 Integrative Management Experiences II ( <i>description change</i> )	<b>106-118</b>
<b>3.</b>	<b>Minutes of the Last Meeting:</b> 2019.03.15	<b>119-151</b>

If you are unable to attend the meeting, please send your regrets to Council secretary Emily Rush at [erush@schulich.yorku.ca](mailto:erush@schulich.yorku.ca).

Remaining meetings of the Schulich Faculty Council for the 2018-2019 year: May 24<sup>th</sup>

**Subject:** Provost seeks input on York University's multi-year Complement Renewal Strategy  
**Date:** Friday, March 15, 2019 at 3:11:08 PM Eastern Daylight Time  
**From:** Senate Secretaries/Faculty Council Secretaries Info. on behalf of Elaine MacRae  
**To:** SENATE-S@YORKU.CA  
**Attachments:** image001.jpg

**Colleagues:** We kindly ask you to circulate the communication below from Provost Philipps to your Faculty Council Chair and Members for discussion at an upcoming Council meeting. If you wish the Provost to attend the meeting, please contact her office directly.

### **Provost seeks input on York University's multi-year Complement Renewal Strategy**

*Lisa Philipps, provost and vice-president academic, issues the following announcement to the York University community:*

In October 2018, my office launched an initiative to develop a multi-year Complement Renewal Strategy for the University, with the goal of clarifying how we can best build the complement needed to achieve academic priorities as expressed in key planning documents including the University Academic Plan and Strategic Research Plan. York has been making steady progress over several years toward renewing, diversifying and modestly growing our tenure-stream faculty complement. This year, we are undertaking 160 searches, a more than 50 per cent increase over last year's authorized appointments. This was just a first step as we developed our longer-term strategy.

Since our launch, Alan Harris, a former provost at three Canadian universities and former dean of social sciences at McMaster University with a wealth of experience with complement planning, has assisted us with the research and analysis that will ground this initiative.

I am now pleased to share with you documents intended to serve as a reference point to inform consultations with the University community this spring. Included are:

- "Faculty Complement Renewal at York University: Provostial Discussion Paper"; and
- "York University's Faculty Complement: A Comparative Analysis."

Over the next few weeks, we will be seeking input from the community on the questions in the discussion paper to determine how to best build York's faculty complement over the next five to 10 years. Venues for consultations will include open forums at the Keele and Glendon campuses, visits to Faculty Councils where possible, the Student Representative Roundtable and an opportunity for written feedback.

I would like to encourage all community members – faculty, staff and students – to read the short Discussion Paper and longer Comparative Analysis and engage in the community consultations. For those who are unable to attend an in-person session, I invite you to provide your written feedback through our [consultation form](#).

Documents and further information can be accessed on the [Provost & Vice-President Academic](#) website. Consultations will take place throughout March and April and further details will be updated on that website as they become available.

**ELAINE MacRAE | Governance Coordinator**

Office of the University Secretary and General Counsel | YORK UNIVERSITY | 1050 Kaneff Tower | 4700 Keele St.

**The 655<sup>th</sup> Meeting of Senate  
held on Thursday, March 28, 2019**

## **Remarks**

The Chair, Professor Franck van Breugel, Lassonde, expressed condolences on behalf of Senate to the victims and families of the tragic event that took place in Christchurch, New Zealand. Echoing the sentiments expressed by the University and community members – including grief, dismay and the commitment to reject such hate and intolerance – the Chair called on all members of the University to nurture an inclusive environment on our campuses. Senators were encouraged to read the recent article published in the Globe & Mail by York professor Zulfikar Hirji, entitled [“To humanize Muslims, let’s start in the classroom”](#).

Delivering the President’s Remarks on behalf of President Rhonda Lenton, Provost Lisa Philipps reiterated the University’s condemnation of the attack in New Zealand and of racism, anti-Semitism and Islamophobia. While York cannot eradicate racism, anti-Semitism and Islamophobia on its own, it will continue to take a strong stance against extremist ideology and contribute to conversations with a view to building a community that respects the dignity of all people. The University has effective processes in place for handling acts of discrimination or hate on campus.

Other comments made by Provost Philipps included the following:

- the recent community conversations held at Keele and Glendon campuses, where the discussion about University priorities was candid, informative and aimed at building collegial governance
- the findings of the provincial government’s Summary Report on the Student Voices on Sexual Violence Survey and the announcement of the government’s requirement that every university establish a task force devoted to tackling sexual violence on campus
- highlights of the federal government’s 2019 budget, which includes investment in work-integrated learning, graduate student scholarship and supports, and an international education strategy
- the upcoming release of the provincial government’s budget on April 11 with details to be provided at the April 25 Senate meeting
- an update on the decanal search processes which have been utilizing the new search procedures, making provision for searches to be conducted confidentially or with an open phase
- the news that York alumna Lilly Singh is going to be the host of a new late-night show on NBC, “A Little Late with Lilly Singh”

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

## **Reports**

The reports, delivered under the auspices of the Academic Planning, Policy and Research Committee, included:

- a presentation from Vice-President Research and Innovation Rob Haché on the E-CV Management Task Force on its development of an E-CV platform for York researchers
- a presentation and facilitated discussion from Provost Philipps on the Provostial Discussion Paper on the Complement Renewal Strategy

## **Approvals**

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

- establish a new degree type and degree program, the Master of Management in Artificial Intelligence, Schulich School of Business / Faculty of Graduate Studies
- change the degree requirements and program learning outcomes for the Master of Business Analytics program, Schulich School of Business / Faculty of Graduate Studies
- change the requirements for the Graduate Diploma in Intermediate Accounting, Schulich School of Business / Faculty of Graduate Studies
- change the degree requirements for the Master of Accounting program, Schulich School of Business / Faculty of Graduate Studies
- change the degree requirements and program learning outcomes for the MA program in Economics, Department of Economics, Faculty of Liberal Arts & Professional Studies / Faculty of Graduate Studies
- change the requirements for the Certificate in Anti-Racist Research and Practice, Department of Equity Studies, Faculty of Liberal Arts & Professional Studies
- change the requirements for the Certificate in Indigenous Studies, Department of Equity Studies, Faculty of Liberal Arts & Professional Studies
- establish a consecutive option for the Black Canadian Studies Certificate, Department of Humanities, Faculty of Liberal Arts & Professional Studies
- grant transfer credits from the School of Dance to the BFA (Honours) program in Dance, School of the Arts, Media, Performance & Design

- establish a stream in Financial Mathematics within the Specialized Honours BA and BSc programs in Applied Mathematics, Department of Mathematics and Statistics, Faculty of Science
- close the Specialized Honours BSc program in Computational Mathematics, Department of Mathematics and Statistics, Faculty of Science

## **Committee Information Reports**

### **Executive (Professor David Mutimer, Interim Vice-Chair)**

The Executive Committee provided Notice of Statutory Motion for the approval of membership of Senate for the period July 1, 2019 to June 30, 2021.

The Executive Committee's information items included the following:

- the extension of the nominations period for the Special Joint Senate-Board Working Group on Jurisdiction Related to the Cancellation/Suspension of Classes during a Labour Disruption to Wednesday, April 10
- the approval of the Faculty of Health member on the Academic Policy, Planning and Research Committee, Professor Eva Peisachovich of the School of Nursing
- the preliminary discussions of core issues and areas to be covered in this year's review of Senate Rules, Procedures & Guidelines
- the review of changes to the Faculty Council rules and procedures in the Faculty of Health
- the approval of recommendations from the Sub-Committee on Honorary Degrees and Ceremonials to add individuals to the pool of prospective recipients of honorary degrees

### **Academic Policy, Planning and Research (Professor Lesley Jacobs, Chair)**

APPRC provided information on these items:

- the preparation of a *Discussion Paper and Action Plan on Achieving Planning Goals While Moving Towards Incomparable Metrics* and the next steps for moving the Incomparable Metrics initiative forward
- its input on the Provostial Discussion Paper on the Complement Renewal Strategy
- the tracking of 2015-2020 UAP progress and preparations for one-on-one discussions with the Deans / Co-Principals over spring and fall 2019 on their respective successes in advancing UAP goals
- progress on the initiative to develop "Faculty Blue", of which the next major step is the development of the proposal for the establishment of the Faculty

- its review of revisions to the *Principles and Procedures Governing Non-Degree Studies*

## **Academic Standards, Curriculum and Pedagogy (Professor Kim Michasiw, Chair)**

ASCP conveyed an update on activities underway relating to the promotion of academic integrity at York. ASCP also provided information on minor changes approved by the Committee.

### *Education*

- Minor change to degree requirements for the BA programs in Educational Studies

### *Health*

- Minor changes to streams within the Specialized Honours BA and BSc programs in Global Health
- Minor changes to degree requirements for the Bachelor of Health Studies
- Minor changes to the requirements for the Interdisciplinary Certificate in Aging
- Minor changes to admission and program requirements for the York-Seneca Rehabilitation Services Certificate

### *Graduate Studies*

- Minor change to the degree requirements for the MA program in Interdisciplinary Studies
- Change in rubrics for the Professional LLM specializations in Osgoode Professional Development
- Changes to the admission requirements in English Language Proficiency

### *Liberal Arts & Professional Studies*

- Minor change to degree requirements for the BA programs in Children, Childhood and Youth
- Minor change to the Bachelor of Human Resources Management Minor program
- Minor changes to requirements for the Professional Certificate in Logistics

### *Lassonde*

- New rubric for technology proficiency courses

### *Science*

- Expansion of the Seneca-York Chemistry Co-Registration Option to the BSc program in Chemistry and the BSc (Honours) program in Biochemistry
- Minor change to degree requirements for the BA and BSc programs in Applied Mathematics
- Minor change to the Biomedical Science stream within the BSc programs in Biology
- Change to non-science general education requirement for BSc programs

### **Awards (Professor Brenda Spotton Visano, Chair)**

The Awards Committee conveyed the 2017-2018 Undergraduate Award Disbursement Report and the 2017-2018 Graduate Disbursement Report.

### **Additional Information about this Meeting**

Please refer to the full Senate agenda and supplementary material posted online with the March 28, 2019 meeting for details about these items.

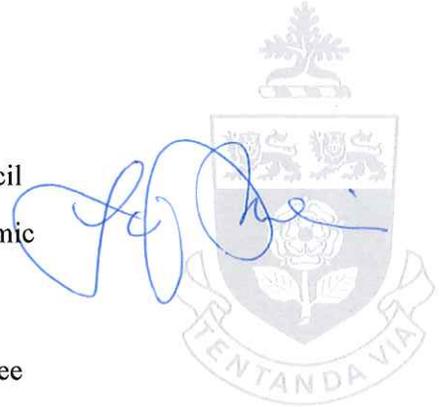
<http://secretariat.info.yorku.ca/senate/meeting-agendas-and-synopses/>

### **April Meeting of Senate**

Senate's next meeting will be held at 3:00 p.m. on Thursday, April 25, 2019

## Memorandum

To: James McKellar, Chair, Schulich Faculty Council  
From: Lisa Philipps, Provost & Vice-President Academic  
Date: April 11, 2019  
Subject: Membership of Schulich Dean Search Committee



Dear Professor McKellar:

I am writing to invite your advice and assistance with regard to continuing membership on the Schulich Dean Search Committee, in light of the recent announcement of the extension of the search into the next academic year. As you know, President Lenton has indicated that the intention is to identify and announce the next Dean by early 2020.

We have canvassed the Search Committee members to determine their ability and willingness to continue to serve to the completion of the search. All have confirmed that they are in a position to continue, with the following exceptions, and it is with regard to these members that we seek your assistance.

Both of the student members of the committee, Sereena Kang (undergraduate student representative) and Leon Martynenko (graduate student representative), expect to graduate prior to the completion of the search. However, they have indicated their willingness and availability to continue to represent their constituencies on the committee to the conclusion of the search. Both have been engaged members of the committee and effective representatives of their constituencies, and the committee would very much welcome their continuing participation. I am therefore seeking your assistance in consulting with the bodies that elected them to request their agreement.

With regard to the faculty members on the committee, Christine Oliver has informed us that she will be retiring from York as of June 30, and Jim Mackay, the contract/part-time faculty member on the committee, may also be retiring prior to the completion of the search process. Both have indicated their willingness to continue as members of the committee; and the committee welcomes their valuable contributions to the process. Therefore, I am asking you to confirm concurrence with their continuing membership to the end of the search.

Given that we are at a relatively late stage of the search process, I believe that enabling these four members of the search committee to continue to the completion of the search will be key to maintaining the integrity and continuity of the process.

Thank you very much for your assistance, and we look forward to achieving a successful conclusion to the search.

Cc: E. Rush, Secretary of Faculty Council

To: Faculty Council, Schulich School of Business  
From: Brent Lyons, Organization Studies  
Date: March 6, 2019  
Re: SB/ORGS 4600 3.00 - New Course Proposal

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**MOTION:**

That Faculty Council approve the new course proposal for SB/ORGS 4600 3.00 – Diversity and Inclusion in Organizations

**RATIONALE:**

There is a gap in course offerings in ORGS. ORGS does offer ORGS 4400 3.00, “Managing Across Cultures,” which looks at international business and country cultures but it does not touch on individual identity, bias, privilege, and stereotypes relating to social groups (race, gender, ability, sexual orientation etc.), all of which are central to diversity and inclusion practices in organizations.

**1. Course Number and Credit Value:**

ORGS 4600 3.00

**2. Long Course Title:**

Diversity and Inclusion in Organizations

**3. Short Course Title:**

Diversity and Inclusion in Organizations

**4. Effective Session:**

Fall 2019

**5. Course Description for the Undergraduate Course Registry and Calendar:**

This course examines diversity (broadly defined to include culture, gender, race, sexual orientation, ability, etc.,) and how organizations leverage opportunities of diversity and also navigate challenges that diversity can bring if mismanaged. Students have the opportunity to critically reflect on topics such as employee identity, maintaining business relationships across difference, the business case for diversity, and supporting organizational goals through inclusion.

**6. Pre-requisites and/or Co-requisites:**

ORGS 2100 3.00, ORGS 2200 3.00, INTL 2300 3.00

**7. Rationale:**

There is a gap in course offerings in ORGS. ORGS does offer ORGS 4400 3.00, “Managing Across Cultures,” which looks at international business and country cultures but it does not touch on individual identity, bias, privilege, and stereotypes relating to social groups (race, gender, ability, sexual orientation etc.), all of which are central to diversity and inclusion practices in organizations.

**8. Instructors and Faculty Coordinator:**

**Initial Instructor**

Brent Lyons

**Alternative Instructors**  
Chris Bell, Ruodan Shao

**Course Coordinator**  
Brent Lyons

**9. Specializations:**

**Primary Area or Specialization**

Organization Studies

**Secondary Areas or Specializations**

NA

**10. What will be the structure of the contact hours of this course each week?**

The contact hours per week is 3 hours and one class per week.

**11. Maximum enrolment**

45

**12. Expected Student Enrolment:**

25

**13. Evidence for enrolment expectations:**

25 is enrollment of similar electives for ORGS courses

**14. Human Participants Research**

NA

**15. If any special computer facilities, teaching materials, or physical facilities are required, please list them.**

NA

**16. Course Outline:**

Attached

**17. Library Statement:**

Attached

**Course Originator:**

  
\_\_\_\_\_  
Signature

March 6, 2019  
\_\_\_\_\_  
Date

Brent Lyons  
\_\_\_\_\_  
Name

Organization Studies (ORGS)  
\_\_\_\_\_  
Area or Specialization

**Supporting Faculty Members:**

The undersigned have examined this course proposal and feel it is a worthwhile addition to the curriculum and does not, to our knowledge, significantly duplicate the content of existing course offerings.

<u>Name</u>	<u>Area</u>
Farrokh Zandi _____	International Business _____
Rudan Shao _____	Organization Studies _____
Dean Neu _____	Accounting _____
Maxim Voronov _____	Organization Studies _____
Tom Wesson _____	Policy _____
Charles Cho _____	Responsible Business/Accounting _____

**Approvals:**

**Area or Specialization:**

This Area/Specialization has reviewed this course proposal and supports the addition of this course to the BBA and/or iBBA curriculum.

Chris Bell  
Signature

March 7, 2019  
Date

Chris Bell  
Name of Coordinator or Director

Organization Studies (ORGS)  
Area or Specialization

**Program:**

The BBA/iBBA Program Committee recommends that this new course be added to the list of the courses specified for the program. Documentation attesting to the faculty member support for the change has been received and archived by the committee chair.

Mike S. Valente  
Signature

March 22, 2019  
Date

Mike S. Valente  
Name of Program Director

## Course Outline

Fall 2019

Day and time TBD, beginning September TBD, 2019

Room: TBD, Seymour Schulich Building

## Instructor

Dr. Brent Lyons

Room N303C, Seymour Schulich Building

blyons@schulich.yorku.ca

Office hours: by appointment

## Assistant

Tammy Tam

N303B, SSB

416-736-5096

ttam@schulich.yorku.ca

## Course Description

This course examines diversity (broadly defined to include culture, gender, race, sexual orientation, ability, etc.,) and how organizations leverage opportunities of diversity and also navigate challenges that diversity can bring if mismanaged. Students have the opportunity to critically reflect on topics such as employee identity, maintaining business relationships across difference, the business case for diversity, and supporting organizational goals through inclusion.

**Prerequisite:** ORGS 2100 and ORGS 2200 (BBA students); INTL 2300 (iBBA students)

## Course Learning Outcomes

The main goals of this course are to:

- (a) reflect on aspects of personal identity that shape employee's experiences
- (b) explain how privilege and bias influence organizational effectiveness,
- (c) describe how to craft more effective relationships in diverse organizations,
- (d) describe current diversity and inclusion practices in organizations, and
- (e) propose ways to enhance inclusion based on course content after analyzing an organization's current approach to leading diversity and inclusion.

## Deliverables at a Glance

Your course grade is a weighted average of the following evaluation components. 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
Course Contribution – In-class	1	20%	20%	Individual
Online Participation	1	5%	5%	Individual
Personal Reflection – Paper	1	25%	25%	Individual
Personal Reflection – Presentation	1	10%	10%	Individual
Group Project – Paper	1	25%	25%	Group
Group Project – Presentation	1	15%	15%	Group
			<b>100%</b>	

## Course Material

Reading material for the course has been organized in two main locations, course kits and Course Materials Database. There will be no textbook for this course. You are expected to come to each class having completed the required readings.

1. Course kits: Preparatory readings have been selected and are available in course kits for purchase from the York University Bookstore. You must purchase a course kit to access these readings
2. Canvas: Your professor will post weekly readings (not in the course kits) to Canvas.

## Classroom Expectations

### ***Student Preparation***

An important teaching vehicle is interactive reflection and discussion. Reading assignments, short simulation exercises, debates and videos have also been chosen to expand your opportunities to learn, discuss and debate. Class preparation and contribution is therefore a key factor in the success of the course. You are expected to come to each class having read the assigned readings and contribute to the class discussion. A willingness to openly share experience, knowledge and perspectives in class is crucial.

### ***Respectful Classroom Environment***

This course touches on topics that may be personal, sensitive and difficult. The course is designed to be comfortable for you but to also challenge you to learn from one another and about yourselves. The professor is committed to creating a safe and positive learning environment so that students can fully engage with course topics and one another. All members of the class will be expected to maintain respect toward one another and be open to different perspectives and experiences. Any disrespect, whether it be in the form of disparaging remarks, harassment, exclusion, or related retaliation, will not be tolerated.

## Class-by-Class Syllabus

Topics, readings, and other preparations for every class are listed below. However, students should always refer to the Canvas for up to date information related to class preparation.

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<b>Date</b> <b>Class 1</b>	<b>Introduction to Diversity</b> <p>In this first class, we'll introduce the concept of diversity that will guide us through the subsequent 11 classes. We'll begin by discussing challenges faced by organizations in harnessing the benefits of diversity, including exclusion, inequality, inter-group stereotypes and bias. In-class activities will cover an ice-breaker, inter-group stereotypes and bias.</p> <p>Required Readings:</p> <ol style="list-style-type: none"><li>1. Solovic, S. W. (2010, July). Workplace stereotyping: A silent productivity destroyer. <i>The Huffington Post</i>. Retrieve from: <a href="http://www.huffingtonpost.com/susan-wilson-solovic/workplace-stereotyping-a_b_564233.html">http://www.huffingtonpost.com/susan-wilson-solovic/workplace-stereotyping-a_b_564233.html</a></li><li>2. Ryan, L. (2013, September 13). Congratulations! You have no skills and storytelling for job seekers. <i>Human Workplace Podcast</i>. Retrieve from: <a href="https://soundcloud.com/lizryanhumanworkplace/congratulations-you-have-no-">https://soundcloud.com/lizryanhumanworkplace/congratulations-you-have-no-</a></li></ol> <p>In-class Activity:</p> <ol style="list-style-type: none"><li>1. Implicit Bias Test</li><li>2. Starbucks Training Case Study</li><li>3. TED Talk: The Power of Diversity Within Yourself</li></ol>
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<b>Date</b> <b>Class 2</b>	<b>Identity and Authenticity</b> <p>In this second class, we begin our focus on individual employees' experience of identity. We'll discuss identity and authenticity in relation to diversity and the pros and cons of bringing one's whole self to work for individuals and organizations. We'll reflect on personal experiences with diversity and opportunities and challenges to being authentic in organizations. In-class activities will cover how diversity of one's personal and professional networks relates to experiences of authenticity at work.</p> <p>Required Readings:</p> <ol style="list-style-type: none"><li>1. Eyl, E. (2014, November). Apple CEO Tim Cook on bringing your whole self to work. <i>LinkedIn</i>. Retrieve from: <a href="https://www.linkedin.com/pulse/20141110152407-4647240-apple-ceo-tim-cook-on-bringing-your-whole-self-to-work">https://www.linkedin.com/pulse/20141110152407-4647240-apple-ceo-tim-cook-on-bringing-your-whole-self-to-work</a></li><li>2. Jackson, J. (2015). Why I don't bring my whole self to work. <i>Blavity</i>. Retrieve from: <a href="https://blavity.com/dont-bring-whole-self-work">https://blavity.com/dont-bring-whole-self-work</a></li><li>3. Phillips, K. W., Dumas, T. L., &amp; Rothbard, N. P. (2018). Diversity and Authenticity. <i>Harvard Business Review</i>, 96(2), 132–136. Retrieve from: <a href="http://researchguides.library.yorku.ca/HBR">http://researchguides.library.yorku.ca/HBR</a></li></ol> <p>In-class Activity:</p> <ol style="list-style-type: none"><li>1. How Diverse is Your Universe?</li></ol>
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## 2. TED Talk: Can We All “Have it All?”

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**Date**  
**Class 3**

### **Individual Identity Strategies**

In our third class, we'll examine the strategies that individuals adopt to navigate diverse and multicultural organizations in order to overcome stereotypes and bias and achieve career goals. We'll discuss how identity relates to such strategies and in particular we'll focus on impression management tactics and the development of multicultural competencies. In-class activities will cover minority employees' impression management choices and personal reflection on our own tactics for achieving career success.

Required Readings:

1. Lyons, B. J., Volpone, S. D., Wessel, J. L., & Alonso, N. M. (2017). Disclosing a disability: Do strategy type and onset controllability make a difference? *Journal of Applied Psychology, 102*, 1375-1385. (permalink on Canvas)
2. Volpone, S. D., Marquardt, D. J., Casper, W. J., & Avery, D. R. (2018). Minimizing cross-cultural maladaptation: How minority status facilitates change in international acculturation. *Journal of Applied Psychology, 103*, 249-260. (permalink on Canvas)

In-class Activity:

1. The Multicultural Self
- 

**Date**  
**Class 4**

### **Multiple Identities and Intersectionality**

In this class we'll complicate our focus on identity and examine how people have multiple and overlapping identities that contribute to their experiences of exclusion and inequality in organizations. We'll discuss intersectionality and the limitations of considering identities in isolation and the benefits of considering identities as multiple and overlapping. We will also consider limitations of an intersectional approach. In-class activities will cover how personal narratives can be informative of the complex ways in which identity impacts employees' experiences of exclusion and inequality.

Required Reading

1. Collins, P. H., & Bilge, S. (2016). What is intersectionality? In Collins, P.H., & Bilge, S. (Eds.), *Intersectionality*, (pp. 1-30). Cambridge, UK: Polity. (coursekit)

In-class Activities

1. The Danger of a Single Story
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**Date**  
**Class 5**

### **Positive Relationships**

In this class we move from our focus on individuals to relationships in organizations. We'll discuss the nature of relationships across social identity group differences and how employees' memberships to majority and minority social groups impact relationship development. We will discuss privilege and identity threat as hurdles to relationship development and employees' authenticity and we'll discuss strategies for positive relationship development that can help smooth inter-group interactions. The in-class activity will be an exercise that involves reflection on majority group privilege and overcoming barriers to positive relationship development.

Required Reading:

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1. Roberts, L. M., (2007). From proving to becoming: How positive relationships create a context for self-discovery and self-actualization. In J. Dutton and B. Rose Ragins (Eds.), *Exploring Positive Relationships at Work: Building a Theoretical and Research Foundation*. Lawrence Erlbaum Associates. (course kit)
  2. Romano, M.J., (2018). White privilege in a white coat: How racism shaped my medical education. *Annals of Family Medicine*, 16, 1-4 .(permalink on Canvas)

In-class Activity:

1. Simulation activity: Building effective relationships across difference at work

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**Date**                      **Co-Curricular Day – No Class**

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**Date**                      **Personal Reflection Presentation – Day 1**

**Class 6**

**ASSIGNMENT DUE:** Personal Reflection Paper due at beginning of class.

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**Date**                      **Personal Reflection Presentation – Day 2**

**Class 7**

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**Date**                      **The Business Case for Diversity**

**Class 8**

In this class we move from our focus on individuals and relationships to organizational approaches to diversity. We'll discuss the business rationale for diversity, including a discussion of diversity management and the impact of diversity management on organization financial performance. We will also discuss the pros and cons of the business case for diversity in regard to employee authenticity, exclusion, inequality, and organizational effectiveness. For the in-class activity we will debate the merits of the business case for diversity.

Required Reading

1. Linnehan, F.L. & Konrad, A. (1999). Diluting diversity: Implications for intergroup inequality in organizations. *Journal of Management Inquiry*, 4, 399-414. (permalink on Canvas)

In-class Activities:

1. Fortune 500 Diversity Definition Activity Simulation
2. TED Talk: How Language Shapes the Way We Think

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**Date**                      **Inclusion and Exclusion**

**Class 9**

In this class we discuss inclusion in depth. We will compare inclusion to the business case for diversity and diversity management (from our previous class) to understand how they differentially impact employees' experiences of exclusion, inequality, and authenticity in organizations. In doing so, we will highlight the benefits of taking an inclusion approach to harnessing diversity. We'll also examine the different ways in which inclusion has been defined and implemented in practice and limitations of current knowledge about what makes inclusion effective in organizations. Activities in today's class will focus on problem-solving in real-world cases of inclusion and exclusion.

Required Reading:

1. Thomas, D. & Ely, R. (1996). Making differences matter: A new paradigm for managing diversity. *Harvard Business Review*.
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Retrieve from: <http://researchguides.library.yorku.ca/HBR>

2. Wolfers, J. (2015, March). Fewer women run big companies than men named John. *The New York Times*. (permalink on Canvas)

In-class Activity:

1. Design an Inclusive Interview Protocol for a Fortune 500 Organization

---

**Date**     **Diversity & Inclusion Interventions**

**Class**  
**10**

In this class we will integrate knowledge from all of our earlier classes to discuss practical diversity and inclusion interventions for businesses to most effectively harness the benefits of diversity for employees' and organizations. We will discuss diversity and inclusion interventions commonly adopted by contemporary businesses, including why they sometimes succeed and sometimes fail. In-class activities will involve critical reflection on "best practice" approaches to diversity and inclusion and the development "tips and tricks" to improve diversity and inclusion interventions.

Required Reading:

1. Dobbin, F. & Kalev, A. (2016). Why diversity programs fail. *Harvard Business Review*.  
Retrieve from: <http://researchguides.library.yorku.ca/HBR>
2. Carter, N. M., & Silva, C. (2011). The myth of the ideal worker: does doing all the right things really get women ahead? *Research Report: Catalyst*.  
Retrieve from: <http://www.catalyst.org/knowledge/myth-ideal-worker-does-doing-all-right-things-really-get-women-ahead>
3. Kang, S. & Kaplan, S. (2019). Working toward gender diversity and inclusion in medicine: myths and solutions. *The Lancet*, 383, 579-586. (permalink on Canvas)

In-class Activity

1. TED Talk: How to Get Serious About Diversity and Inclusion in the Workplace

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**Date**     **Diversity & Inclusion in Practice – Guest Speaker**

**Class**  
**11**

In this class, a guest speaker who works in the business of diversity and inclusion will share their perspective and experiences regarding the practice of inclusion in the contemporary Canadian business context.

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**Date**     **Group Presentations**

**Class**  
**12**

**ASSIGNMENT DUE:** Group Report due at beginning of class.

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## Evaluation of Written Assignments, Projects, Contribution, and Exams

### **Course Contribution – In-class Participation (20%)**

Given that mutual learning is an essential objective, you are expected to come to each class having read the assigned readings and contribute to the class discussion. Reading assignments, simulation exercises, debates and videos have also been chosen to expand learning through discussion and debate. Class participation around these activities and discussion of the readings is therefore a key factor for success in the course.

Each day after class I review each student's contribution to **class discussion** and assign it from -1 to 4 points noting absences, illnesses, and students who had their hands up but were not called on.

- Students who are absent receive 0;
- those who are present but say nothing receive 1;
- those who offer topical information or provide factual information from the reading/case to advance the class discussion receive 2;
- those who contribute by building on or challenge comments made in class in ways that elicit student learning receive 3;
- those who demonstrate an ability to analyze/apply course material and are willing to take risks in attempting to answer difficult questions receive 4.
- Finally, those who are clearly unprepared, fail to listen, arrive late to class, and are disruptive or disrespectful -1.

Halfway through the course I will provide all students with individual feedback on their course participation with a specific point score and how that score compares with the rest of the class.

### ***Online Participation (5%)***

You will complete an online quiz via Canvas before each class (starting in week 2). Two days before Class # 2, 3, 4, 5, 8, 9, and 10 I will post a quiz to Canvas. Each quiz will contain five multiple choice questions and will test on material covered in the assigned readings for that week. The quizzes are open-book and are designed to help you keep up with course readings. You are to **complete 5 of the 7 quizzes** and each quiz is worth 1% of your final grade. If you choose to complete more than 5 quizzes, then the top five scoring quizzes will count toward your final grade.

### ***Personal Reflection – Paper (15%)***

You will write a five-page paper (double-spaced, 12-pt font) about how your identities (multiple and intersecting) shape your personal story and how your story can facilitate achieving your career goals.

In this assignment you will examine your life story, personality, and values—with emphasis on the influences of your identities—to describe your personal story. Crafting a personal story around your identities is an essential skill to achieve desired outcomes in organizations (e.g., applying for a job; interviewing for a position). You are encouraged to keep track of your thoughts/ideas about yourself over the semester to help craft your story as we discuss topics such as “Authenticity” and the “Identity Management.” Your paper will be treated with the utmost confidence and will not be shared with anyone else in the class.

You will submit a hard copy of the report at the beginning of Class 6, date TBD.

### ***Personal Reflection – Presentation (10%)***

During Classes 6 (date TBD) and 7 (date TBD) you will present your personal reflection to the class in a 10-minute oral presentation. Grading of the presentation will be based on the following:

1. Presentation skills (e.g. eye contact, hand gestures, voice, effective use of visual aids)
2. Integration of course concepts
3. Creativity/Originality
4. Effective responses to questions

### ***Group Project – Paper (25%)***

You will have a comprehensive team project during the semester. The group project is designed to test you on your ability to apply course concepts to develop a practical inclusion intervention for a real business. Groups of 4-5 students will draw on course concepts and design an intervention for a familiar organization. For instance, you may choose to focus on an organization that has been highlighted in the news for diversity issues or an organization where you have worked. The report should include an analysis of the organization’s purpose, environment, mission, vision, values, goals, strategy, demographic composition, culture, diversity issue to be addressed by the intervention, and a description of the intervention. You must integrate multiple concepts covered in class and demonstrate an in-depth understanding of those concepts. Your intervention must be practical and realistic.

In addition to class and text materials, groups may also use newspaper and media articles, surveys or interviews conducted by the team or other materials relevant to understanding the organization and the appropriateness of your inclusion intervention.

The written report is meant to provide an overview of your analysis and intervention and must be no more than 3000 words. You should reference all sources. Appendices may be added if relevant (not included in the word count). Note that your written report needs to stand-alone and provide a complete discussion of your analysis and intervention.

Grading of the report will be based on:

1. Content, quality of analysis, thoroughness and accuracy – 50%
2. Organization and flow – 20%
3. Presentation and style of the report – 15%
4. Originality and creativity – 15%

The report is due in hard copy prior at the beginning of class 12 on date TBD.

**Group Project – Presentation (15%)**

During Class 12 as a group you will present your analysis and intervention plan in a 15-minute oral presentation followed by 5 minutes of Q&A.

Grading of the presentation will be based on the following:

1. Presentation skills (e.g. eye contact, hand gestures, voice, effective use of visual aids)
2. Integration of course concepts
3. Relevance of analysis
4. Practicality of intervention
5. Creativity/Originality
6. Effective responses to questions

**Calculation of Course Grade**

For this course, students will receive numerical grades for their performance across all five evaluation components. The Schulich School does not use a percentage scale or prescribe a standard conversion formula from percentages to letter grades.

Consequently, conversions within this course will be as follows:

<b>Letter Grade</b>	A+	A	B+	B	C+	C	D+	D	F
<b>Grade Points</b>	9	8	7	6	5	4	3	2	0

<b>Numerical Score</b>	90-100	80-89	75-79	70-74	65-69	60-64	55-59	50-54	0-49
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### General Academic Policies: Grading, Academic Honesty, Accommodations and Exams

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

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

[http://schulich.yorku.ca/client/schulich/schulich\\_lp4w\\_Ind\\_webstation.nsf/page/Academic+Policies+BBA?OpenDocument](http://schulich.yorku.ca/client/schulich/schulich_lp4w_Ind_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\\_Ind\\_webstation.nsf/page/Academic+Honesty!OpenDocument](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/>.

**SUBJECT:** Library Statement for ORGS 4600: Diversity and Inclusion in Organizations

**FROM:** Stephanie Quail, Business Librarian

**DATE:** March 8, 2019

York University Libraries (YUL) will be able to support the proposed course, *ORGS 4600: Diversity and Inclusion in Organizations*. The Libraries has a comprehensive collection of books, eBooks, business article databases, and industry and company research databases that will support students as they complete their course assignments. Students will also have access to teaching and learning supports, such as research guides, which can help them with their coursework. These resources will be particularly useful for their Group Project Paper assignment, as it encourages them to use secondary research.

**Required Readings:**

The course proposal lists a number of required readings that come from journals that YUL subscribes to. While the professor intends to provide access to the readings through a course kit, the librarian responsible for this subject area has prepared a document with persistent, stable URLs (permalinks) to the articles. Instead of preparing a course kit, the faculty member can instead put the permalinks in the course's Canvas. Students will then be able to retrieve the articles and read them online or print them out.

Students have also been assigned a number of readings from the *Harvard Business Review*. Due to copyright restrictions, instructors cannot post direct links to HBR articles on their course's Canvas. However, the instructor can include a link to the [Library's HBR articles guide](#) on the course's Canvas. Students can then use the search widget on the left-hand side of the guide to search for the HBR articles using the article's title.

Students will also be asked to read one chapter from each of the following books: (1) *Intersectionality* by Collins and Bilge; and (2) *Exploring Positive Relationships at Work: Building a Theoretical and Research Foundation* edited by Dutton and Rose Raggins. Instead of preparing a course kit that includes these readings, the instructor could submit a course reserve request to the [Library's online course reserve system](#). The Bronfman Library could then put a copy of each textbook on course reserve for the students.

Finally, the syllabus lists a number of resources that can be accessed via the internet. The librarian recommends that the professor submit this course syllabi to the Copyright Office before the course runs each semester. They can double-check the permalinks for the library-licensed resources, and also check the terms of use for resources that appear to be freely available on the internet.

**Additional Collections & Teaching/Learning Supports:**

The students in the course may wish to consult a variety of secondary research resources YUL subscribes to in order to access authoritative, quality resources for their course assignments. Some of the below resources will be particularly helpful:

- **Print & eBooks books:** The majority of relevant print books are located in the Peter F. Bronfman Business Library and the Scott Library; however, a large

selection of eBooks can also be accessed both on and off-campus. The best subject heading to use when searching for these books is: *Diversity in the workplace*.

- **Scholarly and Trade Article Databases:** The library subscribes to major business scholarly and trade article databases such as *Proquest Business* and *Business Source Complete*. Students will be able to find relevant articles on topics such: diversity and organizations; workplace diversity; and leadership and diversity. Additionally, *PsycINFO* is a useful database to consult for articles on the psychological aspects of diversity in the workplace. The instructor could also embed the [Organizational Behaviour Research Guide](#) and the [Human Resource Management Research Guide](#) into the course's Canvas to point the students to the best resources for finding articles.
- **Newspaper and Magazine Databases:** The library subscribes to databases such as *Factiva*, which provides access to over 30,000 news sources, as well as the database, *Canadian Newsstand: Major Dailies*. These resources are also listed in the above research guides.
- **Company & Industry Research Databases:** The library subscribes to key company and industry databases, such as *Sustainalytics* (provides access to over 4,500 company ESG reports), These databases can help students find useful information to help with their Group Project Assignment. While a complete listing of the library's business databases can be found on the [Business Resources A-Z webpage](#), the instructor may want to point students to key business research guides such as the [Company Research guide](#) and the [Industry Research guide](#).

While the above section highlights specific business research guides that are relevant to this course, YUL's complete listing of research guides can be found on the Bronfman Library's [business research guides webpage](#).

Additionally, the instructor may want to embed some of the modules from [BRYT \(Business Research at York Toolkit\)](#) into the course's Canvas. BRYT provides students with step-by-step video and PDF resources that explain how to use company, industry, market, finance, and accounting/taxation research databases more effectively.

Finally, if students experience any issues navigating the resources or need research help, they can receive help from YUL's business librarians in-person, by phone, by email, or through the library's online chat. All of these research help resources can be accessed via the [Ask a Question webpage](#).

## Schulich School of Business Memorandum

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To: Faculty Council, Schulich School of Business

From: Ashwin Joshi, MBA Program Director

Date: March 3, 2019

Re: New Course Proposal – MGMT 6150 3.0 (Leadership Development for Accelerated Students:  
Leadership Skills for a Turbulent World)

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**Motion:**

Approve MGMT 6150 3.00 Leadership Development for Accelerated Students:  
Leadership Skills for a Turbulent World

**Rationale:**

This course is specifically designed for accelerated MBA students. These students hold business undergraduate degrees from reputable schools and therefore receive waivers for all first-year core course of the Schulich MBA program. While that is reasonable with respect to core functional area skills, such as finance, accounting or marketing, it also means that these students have less exposure to topics and materials that Schulich specific and differentiate the school from other business schools. This course addresses that gap.

More specifically, students will learn to cope with complexity and turbulence, and develop the skills to deal with multi-stakeholder environments strategically, providing them with a Schulich specific angle on already existing knowledge and skills.

Moreover, because the students enter the program in its third semester and typically with significant work experience, their challenges regarding career and leadership skill development differ to some extent from the needs of the other students. This course will address those challenge and help the students develop their skills and careers beyond the program.

## New Course Proposal Form

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The following information is required for all new course proposals. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).

**1. Program:**

(Accelerated) Master of Business Administration (MBA) Program

**2. Course Number:**

MGMT 6150

**3. Credit Value:**

3.00

**4. Long Course Title:**

Leadership Development for Accelerated Students: Leadership Skills for a Turbulent World

**5. Short Course Title:**

Leadership Skills for a Turbulent World

**6. Effective Session:**

Fall 2019

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

Drawing on complexity science, strategy, psychology and leadership development models, the course employs lectures, experiential learning activities and self-assessments to help students develop the leadership and professional skills required for a turbulent world. Students will learn to deal with complex problems strategically and effectively and be challenged to advance self-identified personal development goals.

**8. Expanded Course Description:**

This course will introduce students to the leadership and strategic thinking skills and mindsets required for success in today's turbulent and complex global environment. For example, today's leaders must have the capacity to accept and deal with unpredictability and be adept at recognizing and integrating multiple perspectives and priorities. They must be able to spot and anticipate emerging trends and patterns; ask and explore provocative questions about their organizations and the world at large; and deal with challenging ethical issues. They must also identify and reflect on their own strengths and limitations to continue their own development and be adaptable.

To begin meeting these needs, this course fosters the *seeing and thinking skills* that are required to make a positive leadership difference. In doing so, it will challenge taken-for-

granted assumptions about business, organizing and leadership; promote a triple bottom line and multiple stakeholder approach to sustainable business; and emphasize the need for reflective personal awareness as core themes for guiding the learning process.

In the most fundamental sense, this course is designed as a **personal challenge** – one that encourages the students to actively engage in the learning process. Students are urged to critically examine the course content and its relevance for their careers, developing both greater “**context awareness**” (understanding the immediate and larger world around them) and “**personal awareness**” (understanding themselves and the way they interact with the world) in the process.

## 9. Course Learning Outcomes

*What will students be able to do upon completion of this course specifically?*

Through this course, students will develop:

- the ability to identify and challenge assumptions;
- reframing skills to deal with complex problems;
- reflective skills to cultivate greater self-awareness;
- a greater degree of self-awareness and an awareness of how their actions, beliefs and attitudes affect the world around them;
- a better understanding of team dynamics and ways to manage them;
- a greater ability to work with diverse others;
- stronger personal and professional communication skills.

## 10. Rationale:

This course is specifically designed for accelerated MBA students. These students hold business undergraduate degrees from reputable schools and therefore receive waivers for all first-year core course of the Schulich MBA program. While that is reasonable with respect to core functional area skills, such as finance, accounting or marketing, it also means that these students have less exposure to topics and materials that Schulich specific and differentiate the school from other business schools. This course addresses that gap.

More specifically, students will learn to cope with complexity and turbulence, and develop the skills to deal with multi-stakeholder environments strategically, providing them with a Schulich specific angle on already existing knowledge and skills.

Moreover, because the students enter the program in its third semester and typically with significant work experience, their challenges regarding career and leadership skill development differ to some extent from the needs of the other students. This course will address those challenge and help the students develop their skills and careers beyond the program.

Because this course is designed for and offered to only accelerated students, there is no overlap with any existing options.

#### 11. Evaluation:

Assignment/Task	Quantity	Weight	Total	Author
Complexity Challenge Team Project	1	30%	30%	Team
Weekly Reflections	5	5	25%	Individual
Personal Development Challenge	1	20%	30%	Individual
Course Contribution	n/a	15%	15%	Individual
			100%	

#### 12. Integrated Courses:

n/a

#### 13. Crosslisted Courses:

n/a

#### 14. Faculty Resources:

Wissam Al Hussaini, Sessional Instructor

Ingo Holzinger, Director, Strategy Field Study

Ashwin Joshi, Associate Professor, Marketing

The course will be offered once a year in the Fall semester.

#### 15. Physical Resources:

A regular class- or seminar room with standard A/V equipment is required.

#### 16. Bibliography and Library Statement:

Achi, Z. & Garvey Berger, J. (2015). "Delighting in the Possible", McKinsey Quarterly, 2015 (2; March), 90-99.

Ancona, D., Malone, T.W., Orlikowski, W.J. & Senge P.M (2007). "In Praise of the Incomplete Leader", Harvard Business Review, 85 (2; February), 92-100.

Andersen, E. (2016). "Learning to Learn." Harvard Business Review, 94(3), 98-101.

Argyris, C. (1991). "Teaching Smart People How to Learn", Harvard Business Review, 69(3), 99-109.

Ashford, S.J. & Detert, J. (2015). "Get the Boss to Buy In". Harvard Business Review, 93(1/2), 72-79.

Haas, M. & Mortensen, M. (2016). "The Secrets of Great Teamwork". Harvard Business Review, 94(6), 70-16.

Martin, R.L. & Golsby-Smith, T. (2017). "Management Is Much More Than A Science", Harvard Business Review, 95(5), 128-135.

- Reeves, M., Levin, S., & Ueda, D. (BCG Henderson Institute; July 18, 2017). Think Biologically: Messy Management for a Complex World, retrievable at <https://www.bcg.com/publications/2017/think-biologically-messy-management-for-complex-world.aspx>
- Porter, M.E. (1996). "What is Strategy?", Harvard Business Review, 74(6; November/December), 61-78.
- Sawhney, M. & Khosla, S. (2014). "Managing Yourself: Where to Look for Insight", Harvard Business Review, 92(11), 126-129.
- Smith, W.K., Lewis, M.W. & Tushman, M.L. (2016). "'Both/And' Leadership". Harvard Business Review, 94(5), 62-70.
- Tsusaka, M., Reeves, M., Hurder, S. & Harnoss, J. (BCG Henderson Institute; July 20, 2017). Diversity at Work, retrievable at <https://www.bcg.com/publications/2017/diversity-at-work.aspx>
- Wendell-Wendellborg, T. (2017). "Are You Solving The Right Problems?", Harvard Business Review, 95 (1; January/February), 76-83.

*Please provide an appropriate and up-to-date bibliography in standard format. A statement from the University librarian responsible for the subject area certifying that adequate library resources are available for the new course must be provided.*

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Please submit completed forms and required supporting documentation by email to the Coordinator, Faculty Governance – [mmschiff@yorku.ca](mailto:mmschiff@yorku.ca)

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

### 17. Instructors and Faculty Coordinator

**Initial instructor**

*Wissam Al Hussaini, Ph.D*

**Alternative instructors**

*Ingo Holzinger, Director, Strategy Field Study*

*Ashwin Joshi, Associate Professor, Marketing*

**Course coordinator**

*Ingo Holzinger, Director, Strategy Field Study*

### 18. Specializations

**Primary area or specialization**

*N/A*

**Secondary areas or specializations**

*N/A*

### 19. Student Contact and Enrolment

**Contact hours**

*36*

**Maximum enrolment**

*55*

**Expected enrolment**

*30-35*

**Evidence for enrolment expectations**

*This is a mandatory course for accelerated MBA students. Based on past admission data, we expect that 30-35 accelerated students will be admitted for the Fall semester, all of whom will be taking the course.*

### 20. Human Participants Research

*N/A*

### 21. Conditions for Approval

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

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

*N/A*

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

*N/A*

### Course Originator



\_\_\_\_\_  
Signature

February 19, 2019  
Date

Ingo Holzinger  
Name

### Supporting Faculty Members

The course originator should consult with other interested parties and obtain their support. Support should be obtained from other units of the university if their interests are related to this course.

The faculty members whose names appear below (minimum 6) confirm that they have examined this course proposal. They feel it is a worthwhile addition to the SSB curriculum and does not, to their knowledge, significantly duplicate the content of existing courses.

Atipol Bhanich Supapol

Brenda Gainer

Anoop Madhok

Theodoros Peridis

David Rice

Chris Bell

Markus Biehl

Steve Weiss

<Name of faculty member>

<Name of faculty member>

### Approvals:

#### Area or Specialization

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

Ashwin Joshi  
Signature

February 20, 2019  
Date



## Course Outline

Fall 2018

XXX

Room XXX SSB

## Instructor

XXX

## Assistant

Nisha Jani

N228 Seymour Schulich Building

416-736-2100 ext. 58089

njani@schulich.yorku.ca

XXX

## Brief Description

Drawing on complexity science, strategy, psychology and leadership development models, the course employs lectures, experiential learning activities and self-assessments to help students develop the leadership and professional skills required for a turbulent world. Students will learn to deal with complex problems strategically and effectively and be challenged to advance self-identified personal development goals.

Prerequisites/Corequisites/Course Exclusions: None

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## Course Learning Outcomes

"The greatest danger in times of turbulence is not the turbulence; it is to act with yesterday's logic."

*Peter Drucker*

This course is about you and your personal and professional development. It will – hopefully – challenge you deeply and in unpredictable ways. You are encouraged to actively engage in the learning process. Being a passive recipient of information will not yield much value in this course. You are urged to critically examine the course content and its relevance for you and your career, developing both greater “**context awareness**” (understanding the immediate and larger world around you) and “**personal awareness**” (understanding yourself and the way you interact with the world around you) in the process.

You will be introduced to frameworks, models, concepts and techniques that foster the *seeing and thinking skills* that are required to make a positive leadership difference in today’s turbulent and complex global environment. None of them, however, will make a difference if you do not take ownership of them. That means you need to critically assess their meaning to you and how they can help you become more effective in your personal leadership challenges.

Through this course, you will develop:

- the ability to identify and challenge assumptions;
- reframing skills to deal with complex problems;
- approaches to effectively manage multi-stakeholder environments;
- reflective skills to cultivate greater self-awareness;
- a greater degree of self-awareness and an awareness of how your actions, beliefs and attitudes affect the world around you;
- a better understanding of team dynamics and ways to manage them;
- a greater ability to work with diverse others;
- stronger personal and professional communication skills.

## Deliverables at a Glance

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

Assignment/Task	Quantity	Weight	Total	Author
Complexity Challenge Team Project	1	30%	30%	Team
Weekly Reflection	5	5%	25%	Individual
Personal Leadership Development Challenge	1	30%	30%	Individual
Course Contribution	n/a	15%	15%	Individual
			<b>100%</b>	

For details, see “Assignments/Projects: Descriptions & Evaluation” (p. 8). More detailed descriptions of the main assignments (team project; personal case; portfolio) will be posted on Moodle.

## Course Materials

**Canvas:** Canvas is the Learning Management System for the course. It will provide the weekly list of readings, the course calendar, course updates and various other course materials, as well as an overview of assignments and grades.

**Readings:** Information on the weekly readings can be found in Canvas. Some readings can be downloaded directly from Canvas. Others can be accessed through York University's library website. A link to the library website and instructions for how to access the readings are provided in Canvas. It is assumed that you have read and thought about the issues explored in the readings before coming to class. Adequate preparation is absolutely necessary to benefit fully from class and be able to contribute to discussions.

There is no textbook for the course.

## Student Preparation for Class and Course Contribution: Expectations

**Preparation.** The value of the class sessions depends greatly on your involvement and input. Active participation by you is not only encouraged; it is required to create a positive and rich learning environment. To be able to participate and create value in discussions, you are expected to have read and thought about the required readings before coming to class. When indicated in the course outline, complete and submit any pre-work before the beginning of class.

**Course Contribution:** You are expected to be present, prepared, and willing to share your views in every class, both voluntarily and when called upon to do so. Try to consistently contribute with comments and questions that pass the "so-what" test by providing insightful analysis that builds on the prior discussion and moves our thinking forward.

One to two quality contributions per week are considered standard.

Some of the considerations for evaluating your course contribution include:

- Are your contributions relevant to the discussion? Are you willing to challenge the ideas that are being expressed? Are you willing to take risks and test-drive some new ideas?
- Do you integrate material from past classes or discussions where appropriate?
- Are you a good listener? Do your comments relate to the questions and suggestions of others and to the themes that the class is exploring together?
- Do your comments reflect cumulative learning over this course or do you merely consider each issue in isolation?
- And most importantly, do you add value to the learning of the class?

Your weekly contributions will be graded according to four possible levels of performance: A, B, C, and F. See the chart below for descriptions of these performance levels:

Grade	Contribution
A	Is prepared and demonstrates a strong understanding of assigned readings; makes regular contributions of high quality; raises new and/or important issues, significantly enhancing the quality of class discussions; contributes original ideas; clearly demonstrates listening skills and adds value to discussions; actively participates in group/class exercises and supports positive team dynamics during exercises.
B	Is prepared and contributes to the discussions, demonstrating a good understanding of the material and/or issues discussed; advances discussions to a certain degree without adding highly original contributions; is fully present; contributes to group/class exercises.
C	Attends class; says nothing or very little of added value; does not actively contribute in team/group exercises.
F	Does not attend class (unexcused).

### Class-by-Class Syllabus

The following list of lecture topics and readings indicates the material to be read, reviewed and/or prepared for the various class sessions. Readings may be added to this list; please check Moodle for updates.

Date	Class Session	Topic	Assigned Readings & Resources	Assigned Work Due
Sept 6 A.M.	1	Leading the Possible: Leadership Challenges in a Turbulent World	Andersen, E. (2016). "Learning to Learn." <i>Harvard Business Review</i> , 94(3), 98-101. Soundview Executive Book Summaries: Taleb, N.N. (2007). "The Black Swan", Random House. Reviewed by Stephen Wolter. Achi, Z. & Garvey Berger, J. (2015). "Delighting in the Possible", <i>McKinsey Quarterly</i> , 2015, Number 2 (March).	
Sept 6 P.M.	2	The Art of Reframing I: Are you Solving the Right Problem?	Wendell-Wendellborg, T. (2017). "Are You Solving The Right Problems?", <i>Harvard Business Review</i> , 95 (1; January/February), 76-83. <a href="#">Folbre, N. (2015, October 11). Review of the book <i>How the Other Half Banks</i>, by Mehrsa Baradaran. <i>The New York Times Sunday Book Review</i>, BR14.</a>	
Sept 7 A.M.	3	The Art of Reframing II: Creating New Ways Forward	Sawhney, M. & Khosla, S. (2014). "Managing Yourself: Where to Look for Insight", <i>Harvard Business Review</i> , 92(11), 126-129. Martin, R.L. & Golsby-Smith, T. (2017). "Management Is Much More Than A Science", <i>Harvard Business Review</i> , 95(5), 128-135.	
Sept 7 P.M.	4	Convergent Thinking: Probing the Possible	Argyris, C. (2002). "Teaching Smart People How to Learn", <i>Reflections</i> , 4(2), 4-15. Liedtka, J.M. (2006). "Using Hypothesis-Driven Thinking in Strategy Consulting", <i>Darden Business Publishing Teaching Note BP-0486</i>	

Date	Class Session	Topic	Assigned Readings & Resources	Assigned Work Due
Sept 8 A.M.	5	From Ideas to Action: Creating Buy-In	Sull, D. N. (1999). "Why Good Companies Go Bad". <i>Harvard Business Review</i> , 77(4), 42-50. Smith, W.K., Lewis, M.W. & Tushman, M.L. (2016). "Both/And' Leadership". <i>Harvard Business Review</i> , 94(5), 62-70. Ashford, S.J. & Detert, J. (2015). "Get the Boss to Buy In". <i>Harvard Business Review</i> , 93(1/2), 72-79.	
Sept 8 P.M.	6	Complexity Challenge Team Projects – Presentations	No readings assigned for this week.	Team Presentations and Project Document (30%)
XXX	7	YOU as a Leader: Developing Self-Awareness	Tjan, A.K. (2012). "How Leaders Become Self-Aware." <i>Harvard Business Review Blog</i> : <a href="https://hbr.org/2012/07/how-leaders-become-self-aware.html">https://hbr.org/2012/07/how-leaders-become-self-aware.html</a> Dobrygowski, D. (2016). "This is the one key trait that all great leaders share." <i>World Economic Forum Blog</i> : <a href="https://www.weforum.org/agenda/2016/03/key-trait-all-great-leaders-share/">https://www.weforum.org/agenda/2016/03/key-trait-all-great-leaders-share/</a>	SET Leadership Assessment  Weekly Reflection
XXX	8	YOU as a Leader: Unique Leadership	Ancona, D., Malone, T.W., Orlikowski, W.J. & Senge P.M (2007). "In Praise of the Incomplete Leader", <i>Harvard Business Review</i> , 85 (2; February), 92-100.	Weekly Reflection
XXX	9	Improv(e) Yourself	No assigned readings for this class.	Weekly Reflection
XXX	10	Power and Influence: How Will YOU Make a Positive Difference?	Heimans, J. & Timms, H. (2014). "Understanding 'New Power'", <i>Harvard Business Review</i> , 92(12), 48-56.	Weekly Reflection
XXX	11	Teams, Leadership and Complexity: Lessons from Biology	Bar-Yam, Yaneer (2016). "Teams: A Manifesto." <a href="https://medium.com/complex-systems-channel/teams-a-manifesto-7490eab144fa">https://medium.com/complex-systems-channel/teams-a-manifesto-7490eab144fa</a> Bar-Yam, Y. (2017). "Why Teams?" <a href="https://medium.com/complex-systems-channel/why-teams-c0a8c6c9acf7">https://medium.com/complex-systems-channel/why-teams-c0a8c6c9acf7</a>	Weekly Reflection
XXX	12	Making a Difference: As a Future Leader I Will Need To...	No assigned readings for this class.	Personal Leadership Development Challenge (30%)

## Assignments/Projects: Descriptions & Evaluation

### Sustainability Team Project

**30%**

For this team assignment, you are asked to apply the ideas, techniques, perspectives and concepts you are learning to manage a complex challenge for a “client company”. Your task is to identify relevant problems/opportunities for the company and develop high leverage actions that will have a positive impact for various stakeholders.

You will be given more detailed instructions and a specific focus for this project in the first class.

For this project, each team will be required to

- Make a tightly integrated **7 minute project presentation** in class 6 on the topic you have been assigned
- Submit an **accompanying slide deck** that demonstrates the substantial analytic and creative work that has been performed

### Weekly Reflection

**5 Reflections; 5% each**

Reflection is an essential process for transforming experiences into learning and personal development. This is your opportunity to reflect on the material covered in the course. For the five classes 7-11, you will be asked to complete a short reflection rubric provided by the instructor that allows you to think about and summarize your key insights for the week and consider how you are going to apply those insights to make a positive leadership difference in the future.

Weekly reflections are due two days after the respective class and to be submitted on Canvas.

### Personal Leadership Development Challenge

**30%**

For this assignment, you – in consultation with the instructor – will determine a personal leadership development challenge or set of challenges that you want to address over the course of the semester. Based on this initial assessment, you will complete a learning contract with the following components:

1. What are you going to learn or develop? (Objectives)
2. How are you going to learn it? (Resources and strategies)
3. Target date(s) for completion (of individual tasks or overall challenge)
4. How are you going to know that you learned/developed it? (Evidence)
5. How are you going to prove that you learned/developed it? (Verification)
6. Instructor feedback (Evaluation)

More specific instructions on how to create a learning contract will be provided in class.

Over the course of the semester, you will complete the challenge(s) you have set out for

yourself and provide evidence and verification that you have done so.

For example, you may have determined that your lack of presentation skills and anxiety about speaking publically inhibit your career and leadership advancement. Consider how you could possibly address those challenges.

1. What are you going to learn or develop? (Objectives)
  - i. To develop stronger presentation skills, and
  - ii. To become more comfortable with public speaking
2. How are you going to learn it? (Resources and strategies)
  - i. Join Toastmasters
  - ii. Actively participate during weekly Toastmaster sessions
  - iii. Volunteer for at least three class presentations
  - iv. Video-record at least two presentations
  - v. Seek feedback from peers
  - vi. Seek feedback from instructors
3. Target date(s) for completion (of individual tasks or overall challenge)
  - i. September 20, 2018
  - ii. ...
  - iii. ...
4. How are you going to know that you learned/developed it? (Evidence)
  - i. Conduct a monthly self-assessment on (a) my presentation skills and (b) my comfort level with public speaking
  - ii. Analyse the video-recorded presentations for improvements and opportunities for further development
  - iii. Have at least two peers analyse the video-recorded presentations
  - iv. Compare the feedback from peers and instructors for indications of improvement
5. How are you going to prove that you learned/developed it? (Verification)
  - i. Submit a summary of the monthly self-assessments to the instructor.
  - ii. Submit a summary of self-analysis and peer analysis of recorded presentations to instructor
  - iii. Submit recorded presentations to instructor
  - iv. Submit written feedback from other instructors and peers to instructor; if feedback was given verbally, a written summary and a signed statement from the person providing the feedback will be submitted
  - v. Submit a reflection on my learning and how it has helped me develop skills required for my leadership development
6. Instructor feedback (Evaluation)
  - i. Instructor will assess the completion, timeliness, and quality of the submissions
  - ii. Instructor will review the reflection for quality and depth of insights and practical takeaways

All submissions for this assignment are due two days after the last class.

## **Course Contribution**

**15%**

Fifteen percent of the overall score are allotted to your active contributions to in-class discussions. More detailed expectations are outlined on page 3.

## **Calculation of Course Grade**

The course grading scheme for Master's level courses at Schulich uses a 9-value grade-point system. The possible letter grades for a course (and the corresponding grade points awarded for each grade) are:

<i>Letter Grade</i>	<i>Grade Points</i>	<i>Interpretation</i>
A+	9	Excellent
A	8	
A-	7	
B+	6	Good
B	5	
B-	4	
C+	3	Acceptable
C	2	
C-	1	
F	0	Failing

Note the qualitative interpretation associated with each letter grade.

The assignments for the course and their respective deliverables are described in the Assignments section of Canvas, which includes explicit evaluation criteria laid out in grading rubrics. In all grading rubrics, levels of performance are indicated by both letter grades (based on the Schulich grading scheme) and "points" earned. For this course, the letter grades assigned to points (or percentages) are based on the following course grading scheme:

<b>Letter Grade</b>	<b>Percentage</b>	<b>Interpretation</b>
A+	100% - 95%	Excellent
A	< 95% - 90%	
A-	< 90% - 85%	
B+	< 85% - 80%	Good
B	< 80% - 75%	
B-	< 75% - 70%	
C+	< 70% - 65%	Acceptable
C	< 65% - 60%	
C-	< 60% - 55%	
F	< 55%	Failing

Note: An A+ (or 100%) is an excellent mark, but do not interpret it as a perfect score. The

assignments in this course typically do not have a "right" or "perfect" answer; there is always more to learn. Your instructor assesses assignments qualitatively with reference to four main levels of performance: excellent vs. good vs. acceptable vs. failing (with "+" and "-" variations within each). Canvas requires the use of percentage scores to calculate course grades; hence, the need for the scheme above.

The letter grades earned on individual assignments and associated percentage scores will be weighted by the weight of the assignment (e.g., Complexity Challenge Team Project: 30%) to calculate the final course grade. The course grading scheme described above will be used to convert percentage scores to letter grades.

This course and its assignments will not be graded on a curve.

Students should expect that 'average' performance, both in the course and on individual assignments, will lead to a grade of B or B+. Only outstanding performance on any of the assignments, which is rare by definition, will lead to a grade in the A range (A-, A, or A+).

**Late Submissions:** Assignments turned in late will be penalized one grade point (e.g., B+ to B) per day late.

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

*Grades* at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

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

For more details on the index, grading policy, and grade point average (GPA) requirements, consult your Student Handbook.

*Academic honesty* is fundamental to the integrity of university education and degree programs, and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may be found in 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/>.

## Quick Reference: Summary of Classes, Activities and Deliverables

Class No., Title and Date	Guest In-Class Case/Exercise	Reading Preparation (excluding cases, optional)	Written Preparation
1. Leading the Possible: Leadership Challenges in a Turbulent World September 6 (morning)		Learning to Learn  Executive Book Summaries of “ <i>The Black Swan</i> ”  Delighting in the Possible	
2. The Art of Reframing I: Are you Solving the Right Problem? September 6 (afternoon)	Continuous Case: <i>How the Other Half Banks</i>	Are You Solving The Right Problem?  How the Other Half Banks	
3. The Art of Reframing II: Creating New Ways Forward September 7 (morning)	Continuous Case: <i>How the Other Half Banks</i>	Managing Yourself: Where to Look for Insight  Management Is Much More Than A Science	
4. Convergent Thinking: Probing the Possible September 7 (afternoon)	Continuous Case: <i>How the Other Half Banks</i>	Teaching Smart People How to Learn  Using Hypothesis-Driven Thinking in Strategy Consulting	
5. From Ideas to Action: Creating Buy-In September 8 (morning)	Continuous Case: <i>How the Other Half Banks</i>	Why Good Companies Go Bad  “Both/And” Leadership  Get the Boss to Buy In	
6. Complexity Challenge Team Projects – Presentations September 8 (afternoon)	Team Presentations: <i>How the Other Half Banks</i>		Project Presentation
7. YOU as a Leader: Developing Self-Awareness XXX	SET Leadership Assessment Debrief	How Leaders Become Self-Aware  This is the one key trait that all great leaders share	SET Leadership Assessment  Weekly Reflection
8. YOU as a Leader: Unique Leadership March 6	Mini-Case	In Praise of the Incomplete Leader	Learning Contract for Personal Development Challenge  Weekly Reflection
9. Improv(e) Yourself XXX	Guest: TBA		Weekly Reflection
10. Power and Influence: How Will YOU Make a Positive Difference? XXX	Interactive Case: Joshua Chamberlain at Gettysburg	Understanding ‘New Power’	Weekly Reflection

11. Teams, Leadership and Complexity: Lessons from Biology XXX		Teams: A Manifesto  Why Teams?	Appreciate Inquiry Exercise  Weekly Reflection
12. Making a Difference: As a Future Leader, I Will Need To... XXX			Personal Leadership Development Challenge

MEMORANDUM  
*Peter F. Bronfman Business Library*

**SUBJECT:** Library Statement for MGMT 6150: Leadership Skills for a Turbulent World

**FROM:** Stephanie Quail, Business Librarian

**DATE:** February 12, 2019

York University Libraries (YUL) will be able to support the proposed course, *MGMT 6150: Leadership Skills for a Turbulent World*. This course will be taken by students enrolled in the accelerated MBA program and will develop the students' leadership skills to help them thrive in complex business environments. A version of this course is already taught in the non-accelerated MBA program. Therefore, strong library supports are already in place and will help students enrolled in the accelerated MBA program.

**Required Readings:**

The course proposal includes a list of required article readings. The majority of these readings are from the *Harvard Business Review (HBR)*. Due to licensing restrictions, HBR articles cannot be linked to on Canvas. Instead, students can locate the articles by searching the library's website or by using the search widget on the Library's [Harvard Business Review guide](#). It is recommended that the instructor includes a link to the guide in their course's Canvas to facilitate easier searching for students. Other assigned article readings can be accessed by the library's website.

The proposal also lists two readings that can be freely accessed via the Boston Consulting Group's website. It is recommended that the professor submit the course syllabus to the Copyright Office before the course runs each semester. The Copyright Office can check the terms of use for library licensed resources, as well as free web-based resources for the professor.

**Additional Collections & Teaching/Learning Supports:**

The students in the course will complete the Complexity Challenge Team Project. This project will require them to consult a variety of secondary resources that YUL subscribes to. Students may also want to consult these resources for other assignments such as the Personal Development Challenge. Some of the authoritative, quality business resources YUL provides access to include:

- **Print books & eBooks:** Relevant print books on topics such as leadership and organizational change are located in both the Peter F. Bronfman Business Library and the Scott Library. A large selection of eBooks are also available to students and can be accessed both on and off-campus. Relevant search terms for locating print and eBooks include: *Leadership; Executives and leadership; and Organizational change*.
- **Scholarly and Trade Article Databases:** The library subscribes to major business scholarly and trade article databases such as *Proquest Business* and *Business Source Complete*. Students will be able to find relevant articles on topics such as strategic leadership, ethical leadership, organizational change, and much more. The instructor could embed the [Finding Business Articles guide](#) in the course's Canvas to point the students to the relevant article databases.
- **Newspaper and Magazine Databases:** Having access to business newspaper content will be valuable for the students, as the course will focus on current

challenging global environments. Students will have access to *Factiva*, which will allow them to search for articles from over 30,000 news sources. Some of the key publications *Factiva* provides access to include the *Globe and Mail*, the *New York Times*, *Forbes*, and the *Wall Street Journal*. The library also subscribes to *Canadian Newsstand: Major Dailies*, which provides access to regional Canadian content.

- **Company, Industry, & Market Research Databases:** For the group project, students will be asked to develop creative solutions to manage a problem for a company. The library subscribes to key company, industry, and market research databases that will help students with this assignment. For example, *Lexis Securities Mosaic* will allow them to run key-word searches on publicly-traded Canadian, American, and U.K. company filings, while *Mergent Online* will allow students to download publicly-traded company financials in Excel. *Sustainalytics* will provide students with access to over 4,500 company ESG/CSR ratings reports. Company SWOTs can be located in databases such as *Marketline* and *Lexis Nexis Academic*, while analyst reports can be located via *Thomson One Investext*. Students can supplement their company research with core industry and market research databases such as *IBISworld*, *Passport*, and *BMI Research*.

A complete listing of the library's business databases can be found on the [Business Resources A-Z webpage](#); however, the instructor may want to embed key business research guides in their Canvas, such as the [Company Research guide](#) or the [Business Ethics guide](#). These guides provide students with curated lists of the best library subscription databases to consult for specific research questions. YUL's complete listing of research guides can be found on the Bronfman Library's [business research guides webpage](#).

Additionally, the instructor may want to embed some of the modules from [BRYT \(Business Research at York Toolkit\)](#) into the course's Canvas. BRYT provides students with step-by-step video and PDF resources that explain how to use company, industry, market, finance, and accounting/taxation research databases more effectively. Students in this course will also benefit from attending the Bronfman Library's drop-in workshop on MBA Research Skills. This workshop is typically run during the first six weeks of the Fall and Winter semesters.

Finally, if students experience any issues navigating the resources or need research consultations, they can receive help from the Bronfman Library's business librarians in-person, by phone, email, or through the library's online chat. All of these research help resources can be accessed via the [Ask a Question webpage](#).

To: Faculty Council, Schulich School of Business  
From: Eileen Fischer & Steve Pulver  
Date: Jan 4, 2019  
Re: SB/ENTR 4400 3.00 – calendar description change

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**RATIONALE:**

Currently, students are admitted to this course with the permission of the instructor only. This procedure was established when the course was initiated because it allowed the instructor to limit enrolment to the number of students who could reasonably be matched with suitable projects.

Now that the course has a track record and we can reasonably assume that the instructor can attract sufficient “clients” to provide projects for students per term. Please note this is a “taught-with” course with ENTR 6400. It makes sense to allow student to enroll through the same process as for other courses. This will allow students to plan their course load more effectively.

## 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/iBBA Program*

**2. Course Number and Credit Value**

*ENTR 4400 3.00*

**3. Course Title**

**a) Long Course Title**

*Applied Entrepreneurship Field Study: Competitiveness of Entrepreneurial Firms*

**b) Short Course Title**

*Applied Entrepreneurship Field Study*

**4. Existing Pre-requisites/Co-Requisites**

*Prerequisites: Students must have completed at least second-year of the BBA or iBBA program. Students must apply for the course with a current résumé Admission by Instructor's permission.*

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

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

**6. Effective Session of Proposed Change(s)**

*Fall 2019*

**7. Academic Rationale**

*Currently, students are admitted to this course with the permission of the instructor only; this allowed the instructor to limit enrolment to the number of students who could reasonably be matched with suitable projects.*

*Now that the course has a track record and we can reasonably assume that the instructor can attract sufficient "clients" to provide projects for students per term. Please note this is a "taught-with" course with ENTR 6400. It makes sense to allow student to enroll through the same process as for other courses. This will allow students to plan their course load more effectively.*

**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).*

<b>Existing Course Information (Change from)</b>	<b>Proposed Course Information (Change to)</b>
<p>Provides students with firsthand experience of the opportunities and challenges growing organizations face. Student groups are paired with an entrepreneurial firm to research an opportunity or project for the firm. Limited classes emphasize consulting, market research and presentation skills.</p> <p>Prerequisites: Students must have completed at least second-year of the BBA or iBBA program. Students must apply for the course with a current résumé Admission by Instructor’s permission.</p>	<p><i>Provides students with firsthand experience of the opportunities and challenges growing organizations face. Student groups are paired with an entrepreneurial firm to research an opportunity or project for the firm. Limited classes emphasize consulting, market research and presentation skills.</i></p> <p><i>Prerequisites: Completion of all year 1 and year 2 core courses.</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**

Eileen Fischer  
Signature

Jan. 4 2019  
Date

Eileen Fischer  
Name

ENTR  
Area or Specialization

**Approvals:**

**Area or Specialization**

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

Steve Pulver  
Signature

Jan. 4 2019  
Date

Steve Pulver  
Name

ENTR  
Area or Specialization

**Degree Program**

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

Mike Valente  
Signature

March 22, 2019  
Date

Mike Valente  
Name of Program Director

BBA/iBBA Programs  
Program

**Program Committee**

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

Mike Valente  
Signature

March 22, 2019  
Date

Mike Valente  
Name of Committee Chair

BBA/iBBA Programs Committee  
Committee

**Long Course Title: Applied Entrepreneurship Field Study: Competitiveness of Entrepreneurial Firms**

**Short Course Title: Applied Entrepreneurship Field Study**

**Fall 2019 - Draft**

## **Instructor**

Eileen Fischer

Office: SSB N304E

Phone:(647)202-4090 (cell)

## **Assistant**

Clara Kan

416-736-2100, X 77960

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e-mail: efischer@schulich.yorku.ca

## **Course Leadership**

Eileen Fischer is a Professor of Marketing and the Tanenbaum Chair of Entrepreneurship and Family Enterprise at the Schulich School of Business.

## **Calendar (short) Course Description**

Provides students with firsthand experience of the opportunities and challenges growing organizations face. Student groups are paired with an entrepreneurial firm to research an opportunity or project for the firm. Limited classes emphasize consulting, market research and presentation skills.

Prerequisites: Completion of all year 1 and year 2 core courses.

## **Expanded Course Description**

The Schulich School of Business has partnered with EO Toronto and Riipen to provide a field study course on Entrepreneurship. EO, Canada's leading entrepreneurial organization, is dedicated to "giving back" to the community and to providing opportunities and education to individuals who are considering an entrepreneurial career path. Riipen is a platform to enable companies and students to arrange mutually beneficial work/learning experiences.

This course is designed to provide BBA/iBBA students the opportunity to obtain firsthand experience inside an entrepreneurial organization, and to get a practitioner's perspective on the challenges growing organizations face. Projects vary widely in scope and nature of company/industry/topic, thus students should be willing and prepared to take on projects as assigned.

Student groups admitted to the course will be paired with an EO or Riipen member for the term to either:

- conduct research on a challenge or opportunity that is currently facing an entrepreneurial company
- work on a short term project that is of importance to an entrepreneurial company

Students will also participate in a limited number of classes that emphasize consulting, market research and presentation skills.

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## Course Learning Outcomes

Through the course, we expect that students will:

1. Learn to assess and validate the sources of competitive advantage of an entrepreneurial organization, and develop ideas for improving an organization’s competitive advantage.
2. Gain experience in scoping a real business problem facing an entrepreneurial organization, and designing a research plan to address that problem.
3. Learn to implement a research plan and adapt it in real time as data collection and analysis reveal new insights, and feedback processes fine tune understandings.
4. Enhance ability to work with clients in a consulting relationship, scoping a problem, designing a research plan and delivering interim and final reports that meet client needs and ensure maximum buy-in.
5. Learn to produce a compelling final report that clearly addresses the scope of the client problem and effectively presents research and analysis to provide recommendations for the client’s issue.

## Evaluation

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

Assignment	Deadline/Date	Quantity	% Weight	Total %	Author
Project Plan	Jan 25	1	20%	20%	Team
Status Report	Mar 1	1	20%	20%	Team
Final Report	Mar 27-29	1	40%	40%	Team
Reflective Journal	April 5	1	20%	20%	Individual
				<b>100%</b>	

Please note that the focus on group work (80%) is meant to reflect the nature of an entrepreneurial firm wherein people regularly form teams to work on key issues. The best time to deal with discord within a group is when it appears, rather than when the final project is due. If team members experience disagreement that they cannot resolve themselves, they should speak with the instructor.

To ensure that the team members each deliver on their commitments to the project, a formal peer evaluation process will be used. A peer grade allocation process will be used to assess the contributions of individual members to the team. Criteria for the peer evaluation include attendance and participation at team meetings; preparation for meetings; cooperativeness in getting work done; time and effort put into the project; timeliness and quality of the work; use of interpersonal and group dynamic skills, and any other elements of teamwork. Take this very seriously, because your instructor does. The instructor will consider this input in assigning the final grade.

## Course Material

### Required Readings:

Required readings for this course include a case (purchase from Ivey site), a HBR case article (search from library source) as well as the following book, available for purchase from Amazon or other popular book outlets.

McQuarrie, Edward, F. (2012) *The Market Research Toolbox*. Sage Publications; 3rd edition.

### Harvard Business Review Articles – library

Exception: Harvard Business Review articles cannot be placed on e-reserve due to licensing restrictions that apply. See here for more information: <http://www.library.yorku.ca/cms/bbl/collections/harvard-business-review/>

Please go to this web site to find recommended HBR article readings available at the library through subscription e-resources themselves: <http://researchguides.library.yorku.ca/HBR>

Or type in “Harvard Business Review” under “eResources” search and use online access (Business Source Premier) – download pdf file and try printing from there with some exceptions which can only be viewed but not be printed.

### Course Materials on Canvas:

A Course area on Canvas has been created for this course. I post rubrics, resources and special instructions on assignments on Canvas. Please check it regularly, and feel free to e-mail me with questions or concerns throughout the term.

Course materials, such as lectures, PowerPoint slides, tests, course notes, outlines, and similar materials, are protected by copyright. As creator of those materials I am the exclusive copyright owner. You may take notes and make copies of course materials for your personal use. However, you may not reproduce or distribute the course materials (e.g. uploading that content to a commercial website) without my express written permission.

Third party copyrighted materials (such as book chapters, journal articles, music, videos, etc.) have either been licensed for use in this course or fall under an exception or limitation in Canadian Copyright law. Copying this content for distribution may lead to a violation of Copyright law.

### Expectations of Students in the Course

**Classes:** This course has four scheduled classes, all scheduled on Fridays. In the first class we will discuss the assignments, the scoping process, the research process, and the importance of confidentiality. Course procedures and grading guidelines will also be discussed. This class is mandatory for all students in the course. The three additional classes will be scheduled: one focused on primary research, secondary research and on client communications – all essential skills for completing your project.

**Initiative and Communication:** Because this course has few scheduled classes, it is critical that each team manages their workload and takes initiative to develop and complete the project plan. Providing a good solid project report to the client not only increases your learning and career prospects, but also increases Schulich's reputation among the employer community. While there are only three formal assessment points for your progress, you are encouraged to make an appointment with me if you are facing any challenges with data collection, your client, or your analysis.

**Providing Deliverables.** You will be asked to provide me with your Project Plan, Status Report and Final Report on or around the due dates. Meetings to discuss these documents will be scheduled at a mutually agreed upon time. Additionally, you are required to present the final report to your client. All team members must participate in meetings scheduled with me, and in final presentations to clients. Arrangements may be made for virtual participation should it be impossible to meet otherwise.

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

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

### Class-by-Class Syllabus

ENTR 4400/6400 class meets in S123 SSB

- 1) The kick off session – Jan 4, 2019 - 11:30 am – 1:30pm
- 2) The quantitative research session – Jan 11, 2019 - 11:30 am - 1:30 pm

- 3) The qualitative research session – Jan 18, 2019 - 11:30 am - 1:30 pm  
 4) The client skills session (Eileen Fischer) – Feb 1, 2019 - 11:30 am - 1:30 pm

Jan 4 Class 1	<p><b>Introduction to the Practicum</b></p> <p><b>Read:</b> Why the Lean Start Up Changes Everything. Reprint R1305C, Harvard Business School Press - please purchase the product from Ivey site: <a href="https://www.iveycases.com/">https://www.iveycases.com/</a> (search for reprint/product number R1305C, add to cart to proceed)</p> <p>We will discuss the scoping process, the research process, and the importance of confidentiality. Assignments, course procedures and grading guidelines will also be discussed.</p>
Jan 11 Class 2	<p><b>Quantitative Research for Entrepreneurial Ventures</b></p> <p>Read: McQuarrie Chapters 7,8, (and glance at 11)</p> <p>We will discuss when it makes sense to use quantitative research techniques to address a new venture’s challenges, and how to conduct basic forms of quantitative research</p>
Jan 18 Class 3	<p><b>Qualitative Research for Entrepreneurial Ventures</b></p> <p>Read McQuarrie Chapters 4,5 (and glance at 6)</p> <p>We will discuss when it makes sense to use qualitative research techniques to address a new venture’s challenges, and how to conduct basic forms of qualitative research</p>
Jan 23- Jan 25 Project Plan Submitted	<p><b>Project Plan <u>Project Plan Document Submitted</u></b></p> <p>The team presents their plan for the project and the instructor provides feedback to the presentation.</p>
Feb 1 Class 4	<p><b>Working with Clients</b></p> <p><b>Case Prep:</b> HBR Case: When Consultants and Clients Clash. Harvard Business School Press Reprint 97605X, <i>Harvard Business Review</i>. Nov/Dec97, Vol. 75 Issue 6, p22-38) – library source</p> <p>Here we will identify some key issues of importance when talking to clients. We will discuss client relations, and students will role play different client communication scenarios.</p>
Weeks of Feb 4, 11	<p>Students conduct their field research for the practicum. The instructor is available for any questions from students.</p>
Weeks of Feb 18	<p>Reading week</p>
Feb 27 – Mar 1	<p><b><u>Status Report Document Submitted</u></b></p> <p>Teams present their project status report and the instructor provides feedback in a 1 hour meeting.</p>

Status Report Submitted	
Week of Mar 4	<b>Optional Status Report Feedback Meeting</b>
Optional Feedback Meeting	Students continue to work on their field research and the instructor is available (at the students' option)
Weeks of Mar 11, 18	Students continue to work on their field research and the instructor is available (at the students' option) to answer questions.
Mar 27-29	Final Report Submitted and Presented
April 5	Reflective Journal due

## Assignments

Performance in this course will be evaluated based on four assignments: the Project Plan, the Status Report, Final Report and the Reflective Journal. A more detailed description of the assignments follows. Rubrics for the written assignments will be posted on the course website.

**Submission Instructions:** For the written assignments, please complete all written reports in no less than 12-point font. You can submit electronic copies of all these to me. On all submissions, please be sure to include the name of your client company and your names and student numbers. **All late submissions will lose ½ of a letter grade per day. Assignments that are more than one week overdue will not be accepted, and will be assigned a grade of zero.**

The **Project Plan** will be a preliminary description of the company, including its bases of competitive advantage, and a project plan for addressing a specific issue the company faces, delivered to your academic project supervisor prior to being submitted to the client. This will be worth 20% of the course grade, and it will be due **January 25**. You must have the Project Plan approved by the instructor before sharing it with the site. You will also have to show evidence that the company has signed off on your Project Plan after it has been approved by the project supervisor.

The **Status Report**. Over the following 6 weeks, students will conduct the research required to address the client's needs.. On **Mar 1**, the students will provide the instructor with a written status report on the project plan, including findings to date, and work remaining. This will be worth 20% of the course grade. It must be delivered to your academic project supervisor and approved before you share it with the client. The written report should be of no more than 10 single-spaced pages, plus appendices.

The **Final Report**. In the final month of the term, students will complete any remaining research and write up the results of their study, incorporating all feedback they have received. They will make recommendations to address the company's issue for this project, as well as for any ways of enhancing the company's competitive position. This will be worth 40% of the course grade, and it will be due on a

specific date to be agreed, **between Mar 27 and 29, 2019**, delivered to me as a written report of no more than 20 single-spaced pages, plus appendices. Importantly, teams must provide this report to the instructor prior to sharing with the client, and share the client presentation with the instructor. They also must show verification that they have presented the report to the company.

The ***Reflective Journal***. To consolidate learning and ensure you have gained the best from your practicum experience, you must reflect on the process and what you have learned. You are encouraged to reflect thoughtfully upon and respond to the specific organizational environment, professional responsibilities, and your own role in furthering the organization through the project. Consider the best and worst parts of the project, why you liked/not liked certain activities and duties, and what you learned from the activities.

The Reflective Journal should be based on the entire project experience and should incorporate the points below. Please write this up so that I can easily aggregate your comments to help us improve the course going forward. Accordingly, please divide your answers into the following sections.

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

This reflective journal will be worth 20% of the course grade, and it will be due on **April 5, 2019**, delivered to your academic project supervisor as a written document of no more than 2000 words.

## Evaluation of Assignments

Rubrics for each assignment will be posted by **January 4**.

## Calculation of Course Grade

In this class, final course grades will be determined by the following process: Each assignment will receive a grade. These will be combined according to the weightings assigned to each assignment to give a final grade. Grades may be rounded up or down depending on the final class distribution.

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

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

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

For more details on the index, grading policy, and grade point average (GPA) requirements, consult your student handbook.

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

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

*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 & Date	Reading Preparation /out of class work	Deadlines
Friday January 4 Practicum Introduction Class	Why the Lean Start Up Changes Everything	Friday, Jan 4. 11:30 AM – 1:30 PM
Friday January 11 Quant research for entrepreneurial ventures	McQuarrie Chapters 7,8, (and glance at 11)	Friday, Jan 11, 11:30 AM – 1:30 PM
Friday January 18 Qual research for entrepreneurial ventures	McQuarrie Chapters 4,5 (and glance at 6)	Friday, Jan 18, 11:30 AM – 1:30 PM
January 25	Written project plan	Presentation and written project plan due Jan 25  Written project plan due to course instructor; Provide project plan to client after getting instructor feedback and inform instructor when client approves.
February 1 Client communications	HBR Case: When Consultants and Clients Clash (Reprint 97605X): Read and prepare	Friday, Feb 1, 11:30 AM – 1:30 PM
Weeks ending Feb 8, Feb 15	Execute project plan; provide instructor with weekly email updates of progress and schedule meetings with instructor as required	
Week of Feb 18	Co-curricular Day	
March 1	Team present their project status report and instructor provides feedback	Written status report due to instructor
Week ending March 8	Share status report with client site and continue research	Inform instructor of client reaction to status report
Weeks ending March 15 and March 22	Continue research as need and work on final report; provide instructor with weekly email updates of progress and schedule meetings with instructor as required	--
March 27-29		Presentation and written final report due
	--	April 5 Reflective Journal Due

## Memorandum

To: Faculty Council  
From: Marcia Annisette, Program Director Master of Accounting  
Date: February 14<sup>th</sup> 2019  
Subject: Minor Program Change to Master of Accounting

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Proposal to replace Financial Statement Analysis with Information Systems as an admissions requirement for the Master of Accounting

### Rationale:

Currently students of CPA accredited programs are required to have completed the following courses for entry into the MAcc: i) Intermediate Financial Accounting 1; ii) Financial Statement Analysis and iii) Law. We are proposing to adjust the requirements by **Replacing** Financial Statement Analysis with Information Systems to this list.

This request is in the light of two developments as follows

1. The inclusion of Financial Statement Analysis as a core course in the MAcc: The Course SSB/ACTG 6250 3.0 Financial Statement Analysis was recently included as a core course in the MAcc. For this reason, it is no longer necessary to include Financial Statement Analysis as an entry requirement to the program.
2. The increasing importance of Information Systems: Whilst entrants into the Master of Accounting program (MAcc) typically would have taken at least one Information Systems course in their undergraduate degrees, an understanding of the information systems environments in which accounting data is created, used and verified is not singled out as an admission requirement into the MAcc. The proposed change being made is in recognition of the increasingly critical role of technology to the functioning of an accountant.

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

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*The following information is required for all proposals involving a change to program/graduate diploma academic requirements, including admission requirements. To facilitate the review/approval process, please use the headings below (and omit the italicized explanations below each heading).*

### **1. Program/Graduate Diploma:** Master of Accounting (MAcc)

### **2. Effective Session of Proposed Change(s):** Fall 2019

### **3. Proposed Change(s) and Rationale**

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

The program proposes to replace Financial Statement Analysis with Information Systems as an admissions requirement for the Master of Accounting. Currently students of CPA accredited programs are required to have completed the following courses for entry into the MAcc: i) Intermediate Financial Accounting 1, ii) Financial Statement Analysis and iii) Law. We are proposing to adjust the requirements by **Replacing** Financial Statement Analysis with Information Systems to this list. .

This request is in the light of two developments as follows

1. The inclusion of Financial Statement Analysis as a core course in the MAcc: The Course SSB ACTG 6250. 3.0 Financial Statement Analysis was recently included as a core course in the MAcc For this reason there is no longer a need to include it as an entry requirement to the program
2. The increasing importance of Information Systems Whilst entrants into the Master of Accounting program (MAcc) typically would have taken at least one Information Systems course in their undergraduate degrees, an understanding of the information systems environments in which accounting data is created, used and verified is not singled out as an admission requirement into the MAcc The proposed change being made is in recognition of the increasingly critical role of technology to the functioning of an accountant.

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

No changes in associated learning outcomes are expected

#### **c) An overview of the consultation undertaken with relevant academic units and an assessment of the impact of the modifications on other programs/graduate diplomas. (Where and as appropriate, the proposal must include statements from the relevant program/graduate diplomas confirming consultation/support.)**

This change occurs in coordination with the inclusion of an Information Systems Course (OMIS 6710) into the Diploma in Intermediate Accounting for which consultations occurred within the Schulich accounting and OMIS areas, the Schulich AD Academic and the Student Services unit. Approval of this change included approval by the Programs Coordinating Committee, which ensured coordination with and approval by other relevant Schulich program representatives.

#### **d) A summary of any resource implications and how they are being addressed. (Attention should be paid to whether the proposed changes will be supported by a reallocation of existing resources or if**

*new/additional resources are required. If new/additional resources are required, the proposal must include a statement from the relevant Dean(s)/Principal.)*

No resource implications

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

This change has no impact on students who are currently enrolled in the MAcc

**4. Calendar Copy**

*Using the following two-column format, provide a copy of the relevant program/graduate diploma requirements as they will appear in the graduate Calendar.*

Existing Program/Graduate Diploma Information (change from)	Proposed Program/Graduate Diploma Information (change to)
<p>The Master of Accounting (MAcc) is a professional degree program designed to develop students' academic and intellectual abilities in all fields of professional accountancy.</p> <p>The 12-month, 42 credit program is accredited by CPA Canada. Successful graduates will have acquired in-depth knowledge in all of the sub-disciplines that constitute the broad field of accounting and will have also deepened their expertise in two chosen areas. They may proceed to write the Common Final Examination immediately following graduation from the program.</p> <p>The program places heavy emphasis on developing students' critical thinking abilities and their capacity to operate in decision environments characterized by high degrees of ambiguity through applied case analysis. Cases also help to develop students' appreciation of multiple viewpoints and perspectives. This program is designed to provide a strong foundation for initial career placement (also through an optional internship in Term 3) and long-term career growth.</p> <p><u>Admission Requirements</u></p> <p>EITHER</p> <p>Successful completion of the Diploma in</p>	<p>The Master of Accounting (MAcc) is a professional degree program designed to develop students' academic and intellectual abilities in all fields of professional accountancy.</p> <p>The 12-month, 42 credit program is accredited by CPA Canada. Successful graduates will have acquired in-depth knowledge in all of the sub-disciplines that constitute the broad field of accounting and will have also deepened their expertise in two chosen areas. They may proceed to write the Common Final Examination immediately following graduation from the program.</p> <p>The program places heavy emphasis on developing students' critical thinking abilities and their capacity to operate in decision environments characterized by high degrees of ambiguity through applied case analysis. Cases also help to develop students' appreciation of multiple viewpoints and perspectives. This program is designed to provide a strong foundation for initial career placement (also through an optional internship in Term 3) and long-term career growth.</p> <p><u>Admission Requirements</u></p> <p>EITHER</p> <p>Successful completion of the Diploma in Intermediate Accounting (minimum B GPA)</p>

### Intermediate Accounting (minimum B GPA)

OR

Applicants must hold a 4-year degree from a recognized university with a minimum B grade point average in the last two full years (or equivalent) of academic work.

Applicants whose degrees are from programs that are not accredited by CPA Canada must first successfully complete the Schulich Diploma in Intermediate Accounting and graduate with a minimum B average.

Applicants with a 4 year business degree from a CPA accredited program must have a minimum B average and must have completed Intermediate Financial Accounting 1, Financial Statement Analysis and Law (or their equivalents) in their programs.

An acceptable score on all measures of either the GMAT or GRE is required. Scores older than five years are not accepted.

Applicants will include two letters of reference, one of which must be from their current or former professors.

Work experience is not required; however, strong internships or prior work experience are recommended.

Schulich's standard requirements pertaining to language capability apply.

#### Waivers and Advanced Standing

For graduates of the Schulich School of Business the following waivers apply:

- GMAT/GRE
- Letters of recommendation

Graduates from CPA-accredited business

OR

Applicants must hold a 4-year degree from a recognized university with a minimum B grade point average in the last two full years (or equivalent) of academic work.

Applicants whose degrees are from programs that are not accredited by CPA Canada must first successfully complete the Schulich Diploma in Intermediate Accounting and graduate with a minimum B average.

Applicants with a 4 year business degree from a CPA accredited program must have a minimum B average and must have completed Intermediate Financial Accounting 1, ~~Financial Statement Analysis Law~~ **and Information Systems** (or their equivalents) in their programs.

An acceptable score on all measures of either the GMAT or GRE is required. Scores older than five years are not accepted.

Applicants will include two letters of reference, one of which must be from their current or former professors.

Work experience is not required; however, strong internships or prior work experience are recommended.

Schulich's standard requirements pertaining to language capability apply.

#### Waivers and Advanced Standing

For graduates of the Schulich School of Business the following waivers apply:

- GMAT/GRE
- Letters of recommendation

Graduates from CPA-accredited business

programs that have completed all Core 1 and Core 2 courses, and Diploma in Intermediate Accounting graduates may receive advanced standing for Term 1. Advanced standing may be granted on a case-by-case basis to graduates of other business programs.

programs that have completed all Core 1 and Core 2 courses, and Diploma in Intermediate Accounting graduates may receive advanced standing for Term 1. Advanced standing may be granted on a case-by-case basis to graduates of other business programs.

## 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**

Real Estate and Infrastructure

**2. Course Number and Credit Value**

*PROP 6750 3.00*

**3. Course Title**

**a) Long Course Title**

*Financing Large Scale Infrastructure*

**b) Short Course Title**

*Financing Large Scale Infrastructure*

**4. Existing Pre-requisites/Co-Requisites**

*Please list any existing pre/co-requisites for this course and ensure that this information aligns with what is included on the attached course outline.*

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

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

**6. Effective Session of Proposed Change(s)**

*Fall Term 2019*

**7. Academic Rationale**

*The co-requisite requirement, or with instructor permission, ensures that the student has or is acquiring the requisite foundation knowledge for this course. No change in the learning outcomes/objectives for the course.*

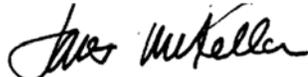
**8. Proposed Course Information**

Existing Course Information (Change from)	Proposed Course Information (Change to)
<p>Understanding the particular characteristics of project finance is fundamental to structuring all business models for the delivery of large-scale infrastructure that supports our cities. This course examines project viability and risk, ownership and contractual structures, funding sources, and financial structuring. The course will be taught through lectures, guest speakers and interactive seminars focusing on case studies.</p> <p><b>Prerequisite: PROP 6300 3.00</b></p>	<p>Understanding the particular characteristics of project finance is fundamental to structuring all business models for the delivery of large-scale infrastructure that supports our cities. This course examines project viability and risk, ownership and contractual structures, funding sources, and financial structuring. The course will be taught through lectures, guest speakers and interactive seminars focusing on case studies.</p> <p><b>Corequisite: PROP 6300 3.00 or with instructor permission</b></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

*February 26, 2019*

\_\_\_\_\_  
Date

James McKellar

\_\_\_\_\_  
Name

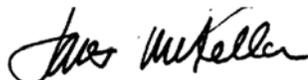
Real Estate and Infrastructure

\_\_\_\_\_  
Area or Specialization

**Approvals:**

**Area or Specialization**

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



\_\_\_\_\_  
Signature

*February 26, 2019*

\_\_\_\_\_  
Date

James McKellar

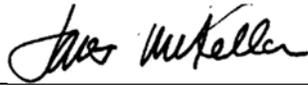
\_\_\_\_\_  
Name

Real Estate and Infrastructure

\_\_\_\_\_  
Area or Specialization

**Degree Program**

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



Signature

*February 26, 2019*

Date

James McKellar

Name of Program Director

Real Estate and Infrastructure

Program

**Program Committee**

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

Detlev Zwick

Signature

March 14, 2019

Date

Detlev Zwick

Name of Committee Chair

MPC-PCC

Committee

# PROP 6750 3.0 Finance for Large Scale Infrastructure



## Course Outline

Summer Term 2018

Wednesday, 7:00-10:00PM, beginning May 2, 2018

Classroom: W133

Instructor	Administrative Assistant
Priscilla Adjei	Bryna Abtan
Seymour Schulich Building <a href="mailto:padjei@schulich.yorku.ca">padjei@schulich.yorku.ca</a>	W362 BB <a href="mailto:babtan@schulich.yorku.ca">babtan@schulich.yorku.ca</a>
By appointment	416-736-5967

Priscilla Adjei is a sessional instructor in the Masters in Real Estate and Infrastructure program as well as an experienced infrastructure finance professional.

## Brief Description

Understanding the particular characteristics of project finance is fundamental to structuring all business models for the delivery of large-scale infrastructure that support our communities. This course examines project viability and risk, ownership and contractual structures, funding sources, and financial structuring. This course will be taught through lectures, guest speakers and interactive seminars focusing on case studies.

Corerequisite: **PROP 6300 3.00 or with instructor permission**

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## Course Learning Outcomes

One of the greatest challenges facing public and private sector actors in the 21<sup>st</sup> century relates to the funding and financing of large-scale infrastructure projects. A central question involved when addressing the growing infrastructure deficit is how public and private actors can generate sufficient funds to develop and manage large-scale infrastructure projects that are commercially viable and fulfill underlying needs.

Project finance has been used since the thirteenth century as a model to finance large-scale infrastructure projects including pipelines, refineries, electric power generating facilities, hydroelectric projects, dock facilities, mines, mineral processing facilities, toll roads and public-private infrastructure projects. Project finance is broadly defined as a method of raising funds on a limited recourse or non-recourse basis to finance an economically separable capital investment project in which the providers of the funds look primarily to the cash flow from the project to service their loans and provide a return. This course examines the key elements involved in project finance and explores the various business models available when financing large-scale infrastructure projects.

The learning outcomes for this course are three-fold:

- 1. Understanding the key elements of project finance**

What is project finance, when is it used, for what reasons, by whom, and to what level of success? This learning outcome covers the key quantitative and qualitative elements of project finance including the techniques that are essential to evaluating project cash-flow and structuring debt financing in order to address and mitigate a project's risk profile. Familiarity with the working parts of the project finance model, the relationships among the parts, the legal agreements, and the roles and responsibilities of the various players is necessary to grasp the full potential of the model and its applications to a wide range of asset classes.

- 2. Assessing the global sources of capital driving project finance**

This learning outcome addresses sources of demand both in developed and emerging economies, the scope and scale of the opportunities, and the various challenges faced around the globe when funding large-scale infrastructure projects. Sources of financing include the growth of the large international equity funds, the role of bank debt, the bond markets, and the burgeoning role for institutional direct investment, particularly the extensive involvement of large pension funds.

- 3. Exploring the future funding models for large-scale infrastructure projects**

Particularly in view of the global financial crisis and a period of slow global growth, the future funding models for large-scale infrastructure projects offer untold opportunities in many sectors, as well as challenges that were not foreseen a few short years ago. The challenges today include the possibility of counterparty defaults, growing political resistance in some countries to so-called "privatization" of public assets, and the increasing global competition

for funds. Despite a stormy macro-economic backdrop, many positive drivers remain that will propel the adoption of techniques to finance large-scale infrastructure projects.

The course complements other electives in real estate or infrastructure but is intended for those students who may contemplate moving into this sector either as an adjunct to a career interest in real estate, or embarking upon what is a rapidly emerging international business of infrastructure with many career opportunities that span a myriad of private, quasi-public, and public organizations across the globe.

The course relies on class participation, readings, in-class simulation exercises and the completion of assignments. Guest lectures supplement the lecture materials. Students are required to come to class well prepared for discussion. The organization of the course requires completion of the assignments as the basis for class discussion.

## Course Material

### Course Text:

- Gatti, Stefano. *Project Finance in Theory and Practice: Designing, Structuring, and Financing Private and Public Projects*. 2<sup>nd</sup> Ed. (2013) Associated Press.

The following textbooks are also an excellent resource, although not a required except as otherwise specified.

- Yescombe, E. R. *Principles of Project Finance*. (2013) Associated Press.
- Esty, Benjamin. *Modern Project Finance: A Casebook*. (2004). John Wiley & Sons, Inc.\*\*
- Finnerty, John, *Project Financing: Asset-Based Financial Engineering*, 2<sup>nd</sup> Ed. (2007) Wiley Finance.

\*\* Weekly case studies are contained in this text. A copy of this text has been placed on Reserves in the Bronfman library. Alternatively, individual cases can be purchased from Harvard Business School Press.

### Other Reference Materials:

Sources providing insights and details on the topic of infrastructure and project financing may be made available as PDF files on the CMD, or through posted Internet sites. Additional readings may be posted on the CMD from time to time.

The Bronfman Library makes available a range of librarian-curated research guides designed to point students to key online resources. See <http://www.library.yorku.ca/web/bbl/guides/>

## Preparation for Class

The course is organized in a series of sequential topics and relies on readings and assignments. Guest lectures supplement the lecture materials. Students are required to read the assigned readings and cases before class and come to class well prepared for discussion. The organization of the course requires completion of the necessary readings, case analysis and assignments as the basis for class discussion.

## Deliverables

### Deliverables at a Glance:

<u>Assignment/Task</u>	<u>Total %</u>
<u>Class Participation</u>	<u>10%</u>
<u>Take-home Assignment</u>	<u>20%</u>
<u>Quiz (in class)</u>	<u>15%</u>
<u>Team Case Study</u>	<u>15%</u>
<u>Final Exam</u>	<u>40%</u>
<u>TOTAL</u>	<u>100%</u>

### Class Participation

Class participation is a key part of the learning experience. Preparation for the class and involvement in class discussions are essential to learning. The class participation grade should be roughly equivalent to the average on all other course components, plus any increase for those who enhance the classroom learning environment with insightful comments and questions. Absence from class will negatively impact this portion of the evaluation. Class contribution will be evaluated in terms of attendance in class, participating in class activities, and the evidence of sound reasoning and positive contribution to class discussion.

Students will be granted one class absence without penalty. Unless further absence is granted by prior written permission from the instructor, the participation grade will then be lowered by one bucket (e.g. A to A-) for each recorded absence. It will be the student's responsibility to sign the attendance sheet.

### Team Case Studies

In weeks 9 and 10 teams of 4-5 students will be responsible for presenting their case analysis as well as moderating a class discussion as it pertains to the case. It is the expectation that students will review each assigned case prior to class.

## Take-home Assignment

Students will be required to complete a take-home assignment, to be assigned May 23, 2018 and due May 30, 2018.

## Quiz

A quiz will be held in class on June 13, 2018.

## Class-by-Class Syllabus

Topics, readings, and other preparations for every class are listed below. Additional reading will be assigned in class. 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 of the change.

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**1. Infrastructure and Project Finance: Overview of Project Design & Structures I**  
**02.05.18**

### Readings

- Gatti, Stefano. *Project Finance in Theory and Practice: Designing, Structuring, and Financing Private and Public Projects*. 2<sup>nd</sup> Ed. (2013) Associated Press. Chapter 1.

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**2. Infrastructure and Project Finance: Overview of Project Design & Structures II**  
**09.05.18**

### Readings

- Gatti, Stefano. *Project Finance in Theory and Practice: Designing, Structuring, and Financing Private and Public Projects*. 2<sup>nd</sup> Ed. (2013) Associated Press. Chapter 2.
- Additional readings may be assigned one week prior to class

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**3. The Role of Risk in Project Finance**

**16.05.18**

**Readings**

- Gatti, Stefano. *Project Finance in Theory and Practice: Designing, Structuring, and Financing Private and Public Projects*. 2<sup>nd</sup> Ed. (2013) Associated Press. Chapters 3 & 8.
- Additional readings may be assigned one week prior to class

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**4. Project Agreements and Project Finance**

**23.05.18**

**Readings**

- Gatti, Stefano. *Project Finance in Theory and Practice: Designing, Structuring, and Financing Private and Public Projects*. 2<sup>nd</sup> Ed. (2013) Associated Press. Chapter 7.
- Additional readings may be assigned one week prior to class

**Take-home Assignment posted**

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**5. Markets for Project Finance**

**30.05.18**

**Readings**

- Gatti, Stefano. *Project Finance in Theory and Practice: Designing, Structuring, and Financing Private and Public Projects*. 2<sup>nd</sup> Ed. (2013) Associated Press. Chapter 6.
- Additional readings may be assigned one week prior to class

**Take-home Assignment due at the start of class**

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**6. Cash Flow Analysis for Project Finance I**

**06.06.18**

**Readings**

- Gatti, Stefano. *Project Finance in Theory and Practice: Designing, Structuring, and Financing Private and Public Projects*. 2<sup>nd</sup> Ed. (2013) Associated Press. Chapter 5.
  - Additional readings may be assigned one-week prior to class
-

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**7.** **Cash Flow Analysis for Project Finance II**  
**13.06.18**

**Readings**

- Gatti, Stefano. *Project Finance in Theory and Practice: Designing, Structuring, and Financing Private and Public Projects*. 2<sup>nd</sup> Ed. (2013) Associated Press. Chapter 5
- Additional readings may be assigned one-week prior to class

**Quiz**

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**8.** **Drop Down Agreements, Covenants and Loan Documents**  
**20.06.18**

**Readings**

- To be assigned one week prior to class
- 

**9.** **Group Case Presentations**  
**27.06.18**

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**10.** **Group Case Presentations**  
**04.07.18**

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**11.** **Role of Advisors in Project Finance**  
**11.07.18**

**Readings**

- Gatti, Stefano. *Project Finance in Theory and Practice: Designing, Structuring, and Financing Private and Public Projects*. 2<sup>nd</sup> Ed. (2013) Associated Press. Chapter 8.
- 

**12.** **Exam Review**  
**18.07.18**

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**25.07.18**

**Final Exam**

## Written Assignments/Projects

Unless stated otherwise in the assignment, the following format will apply to all written submissions:

Hard copy, paper size, 8 1/2" x 11"

Margins, top/bottom/left/right -1" minimum

Spacing - double spacing

Font size, 11pt, (tables can be 10pt)

Font style, Arial, Helvetica or Calibri

Page numbers, lower right corner

Name, date and student number will be included on each page in the heading bar.

All visual presentations will be submitted in PowerPoint format to the prescribed length and an electronic copy shall be filed with the instructor.

## Evaluation of Written Assignments/Projects

A+	9	Grades for assignments will be a letter grades according to the following schedule. Any submissions received after the deadline will not be accepted and a zero grade will be entered, unless a deferment is agreed upon in advance by the instructor. All members of a group will receive the same grade. All submission shall be in hard copy, unless by prior agreement with the instructor or stated otherwise in the particular assignment. All work will be handed in at start of class. Students can expect to receive their graded work, with comments, within one-week of submission, unless notified otherwise.
A	8	
A-	7	
B+	6	
B	5	
B-	4	
C+	3	
C	2	
C-	1	
F	0	
With most assignments a grading matrix will be issued that will identify the evaluation criteria, the relative weighting of each, the assigned grade, and comments.		

The Final Grade will be derived by weighting each component according to the proportions assigned to each assignment. Final Grades may be adjusted across the entire class to conform to the requirement that the class average **must** fall between 5.2 and 6.2.

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

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

[http://www.schulich.yorku.ca/client/schulich/schulich\\_lp4w\\_Ind\\_webstation.nsf/page/Enrolment+Grades+and+Convocation!OpenDocument#tabs-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](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/>.

# Course Change Proposal Template

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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 IMBA Program*

**2. Course Number and Credit Value**

*IMBA 5002 1.50*

**3. Course Title**

**a) Long Course Title**

*IMBA 5002 Managerial Decisions Analysis*

**b) Short Course Title**

*As above*

**4. Existing Pre-requisites/Co-Requisites**

*N/A*

**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)
<b>X</b>	<b>in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)</b>
	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)**

*Summer 2019*

**7. Academic Rationale**

*These adjustments bring the course descriptions contained in the MBA handbook in line with the course description approved in the program redesign completed in W18*

**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><del>This course provides a one week introductory course on analytical methods for managerial decision making to be followed by an integrative module of core functional courses.</del> The focus is on a robust framework to critically describe, analyze and communicate a range of complex managerial problems using both qualitative and quantitative data.</p>	<p>This course is an introduction to analytic methods used for managerial decision making. The focus is on a robust framework to critically describe, analyze and communicate a range of complex managerial problems using both qualitative and quantitative data.</p>

**9. Consultation**

**Originator**

<p>Tom Medcof _____ Signature</p>	<p>1/31/19 _____ Date</p>
<p>Tom Medcof _____ Name</p>	<p>IMBA _____ Area or Specialization</p>

**Approvals:**

**Area or Specialization**

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

<p>Ric Irving _____ Signature</p>	<p>Mar 5 2019 _____ Date</p>
<p>Ric Irving _____ Name</p>	<p>OMIS _____ Area or Specialization</p>

**Degree Program**

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

Tom Medcof	1/31/19
_____ Signature	_____ Date

Tom Medcof	IMBA
_____ Name of Program Director	_____ Program

**Program Committee**

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

Detlev Zwick	March 14, 2019
_____ Signature	_____ Date

Detlev Zwick	MPC-PCC
_____ Name of Committee Chair	_____ Committee

## Course Outline

Fall 2018

September 19 <sup>th</sup>	8:30PM – 11:30PM	RM: S128
September 20 <sup>th</sup>	2:30PM – 5:30PM	RM: W132
September 27 <sup>th</sup>	2:30PM – 5:30PM	RM: W132
October 4 <sup>th</sup>	2:30PM – 5:30PM	RM: W132
October 11 <sup>th</sup>	2:30PM – 5:30PM	RM: W132
October 18 <sup>th</sup>	2:30PM – 5:30PM	RM: W132
October 18 <sup>th</sup>	5:30PM – 7:00PM	RM: W256

### Instructor

Mark Thomas  
 S337, Seymour Schulich Building  
 416 988-9750  
[mthomas@schulich.yorku.ca](mailto:mthomas@schulich.yorku.ca)  
 Office hours: Please coordinate via email

### Assistant

Mima Gualtieri  
 N203B SSB  
 (416) 736-5942  
[imba@schulich.yorku.ca](mailto:imba@schulich.yorku.ca)

**Mark Thomas**, P.Eng., MBA, PMP is the Program Director for the Centre of Excellence of the Schulich Executive Education Centre. He is also Managing Principal and President of META Management Consulting. He has more than 20 years of executive management and consulting experience, many with KPMG.

### Brief Course

This course provides an introductory course on analytical methods for managerial decision making to complement an integrative module of core functional courses. The focus is on a robust framework to critically describe, analyze and communicate a range of complex managerial problems using both qualitative and quantitative data.

Prerequisites/Corequisites/Course Exclusions: None.

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## Course Learning Outcomes

This is an introductory course on analytical methods for managerial decision making to compliment an integrative module of other core functional courses. The focus is on a robust framework to critically describe, analyze and communicate a range of complex managerial problems using both qualitative and quantitative data.

In this course students will learn how to make better managerial decisions. This is accomplished by taking students through the entire analytical decision-making cycle, from problem/opportunity identification, alternative generation, evaluation to communication. Further techniques related to this cycle will be taught in consecutive modules within the IMBA program.

The students will learn basic analytic tools that can be applied to a wide range of managerial situations to provide insights that support the exercise of better judgement. The use of these tools and the resulting decisions must then be communicated to stakeholders in a clear and compelling fashion.

The learning objectives to be achieved by students in the course are to:

- 1) Understand the key current issues impacting the effectiveness of managerial decision making.
- 2) Describe complex opportunities and problems accurately leading to appropriate decision making.
- 3) Describe the decision-making context statistically and assess potential uncertainties.
- 4) Generate credible alternatives and the means for their selection in a decision.
- 5) Use financial and accounting methods in cost and benefit analysis in evaluating alternatives.
- 6) Assess the sensitivity of decision outcomes to change.
- 7) Communicate a decision to stakeholders.

## Organization of the Course

This course is structured to achieve the learning objectives through a combination of lecture, class discussion and case study.

## Deliverables and Evaluation at a Glance

Assignment/Task	Quantity	% Weight	Total %	Author	Due
Class Preparation Notes (submitted in advance of class)	3	10%	30%	Individual	Prior to classes 1, 2 and 3
Group Report and Presentation	1	25%	25%	Group	6 <sup>th</sup> session
Class Participation	1	10%	10%	Individual	Everyday
Exam (180 minutes)	1	35%	35%	Individual	Final session
			<b>100%</b>		

For details, see “Written Assignments/Projects and Exam[s]: Descriptions” (p. 9)

## Course Material

*Required reading* for this course is two texts and readings from Ivey Publishing and Harvard Business School Publishing:

**The first text is:**

**Chapters 1, 2, 7 and 15 from Essentials of Business Analytics, 2nd Edition 2016.**

**Cengage Learning**

**ISBN-10: 1305627733 | ISBN-13: 9781305627734**

**Jeffrey D. Camm; James J. Cochran; Michael J. Fry; Jeffrey W. Ohlmann; David R. Anderson; Dennis J. Sweeney; Thomas A. Williams**

This book can either be purchased at the York University Bookstore in York Lanes or you can buy access to the whole textbook for \$99.95 for 2 years at

[www.nelsonbrain.com/shop/micro/yorku/imba5002](http://www.nelsonbrain.com/shop/micro/yorku/imba5002).

**The second text is:**

**Fundamentals of Corporate Finance with Connect Access Card, 9th Canadian Ed., 2016**

**McGraw-Hill Ryerson, Package with Connect**

**ISBN-13:978-125908758-5**

**Ross, Westerfield, Jordan, and Roberts**

**(You will need chapters 5 and 6 for Class 5 of this course AND the rest of the text soon after for IMBA 5103 -- another required course).**

This book can be purchased at the York University Bookstore in York Lanes.

**Other readings you need to get:**

From Ivey Publishing (<https://www.iveycases.com/Default.aspx> )

1. **An Economic Framework for Assessing Development Impact** HBSP 9-202-052
2. **Nghe An Tate and Lyle Sugar Company (Vietnam)** HBSP 9-202-054

From Harvard Business School Publishing (<http://hbsp.harvard.edu/> )

1. **Deciding How to Decide.** Harvard Business Review, November 2013. HBSP R1311C  
<http://hbr.org/product/deciding-how-to-decide/an/R1311C-PDF-ENG>
2. **Keep Up With Your Quants.** Harvard Business Review, July-August 2013 HBSP R1307L  
<http://hbr.org/product/keep-up-with-your-quants/an/R1307L-PDF-ENG>

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 including PowerPoints and instructor distributed material. Check it frequently.

**Financial Calculator:**

Students are expected to own a financial calculator and use it in class. Here is a link showing the popular brands and models of financial calculators and user instructions.

[http://www.tvmcalcs.com/calculator\\_index](http://www.tvmcalcs.com/calculator_index)

## Student Preparation for Class and Class Participation: Expectations

Participation is a reward for sharing your well-prepared thoughts and relevant experience with the class. Good class participation by all class members is necessary to get the most out of the cases and readings. You are encouraged to take advantage of this gathering of your peers to improve your communication skills and obtain feedback on your views in a relatively low-risk environment.

Good participation is defined and measured as, "the consistent demonstration of good preparation and presentation of relevant thought about the readings, cases, and exercises". Creative approaches are welcome. The sharing of experiences relevant to the topics being discussed is also appreciated where class time allows.

Here is a checklist for determining the adequacy of your own participation in and out of class:

- 1) Am I a good listener?
- 2) Are my points relevant to the discussion and address those of others?
- 3) Do my comments reflect good preparation (See Appendix 3)?
- 4) Are my comments a rehash of case facts or points made by others with no additional insight?
- 5) Am I taking chances, being critical in a constructive manner and trying to be innovative or just playing it safe?
- 6) Do I ask good questions?
- 7) Do I help discussion with clarifications, concise summaries, appropriate use of numbers, or lead discussion into relevant areas?
- 8) Do I respect the right of other class members to participate?

Attendance is not participation. Your attendance, on time for the start of the class and for the entire duration of the class is a course requirement. If you miss more than three classes, you have failed the course. If you feel you must miss a class or any part of a class, please inform the instructor before the class so that you will not be called upon in class and the instructor can advise you on how to keep up with the rest of the class. People often vary as to their level of confidence and ability in speaking for various reasons. The instructor is aware of this and will try to help where possible.

### **Student Responsibilities**

- 1) Be prepared for class. You should expect to be called upon in class to present your analysis and positions at any time.
- 2) Be on time for class. Given the short duration of the course we need to use the full amount of time available without distracting interruptions from late arrivals and early departures. The instructor reserves the right to refuse late arrivals admittance to the class.
- 3) Keep me informed. Do not suffer in silence. Let the instructor know if you are having problems. Let it be known if you cannot attend class. You do not want to miss anything.
- 4) Identify yourself. Universities can be impersonal places, do not become a number! Keep a clean name tag. This is important for monitoring your participation. Identify all your work completely with student number and name. Both of these actions will help the instructor to get to know you as an individual.
- 5) Get the information directly from the instructor. If you have a question about the course, contact the instructor directly. Do not rely on second hand information from students and former students of the course. When in doubt, first consult this course outline.

- 6) Check the course CMD before class. The instructor posts announcements, supplementary materials and corrections on the CMD which may not mentioned or discussed in class because of time constraints.
- 7) Do NOT record audio or images in class unless given permission. Assume that you cannot use your smartphone, tablet or laptop to record any classroom activity. We must respect the privacy of class members, the instructor and guests at all times.
- 8) Show respect for your classmates. We have all been distracted in class by people answering their e-mail, texting, tweeting, surfing, having social chats with people sitting next to them. Be professional and avoid distracting your class mates from their learning.

### **Getting Help**

In order of responsiveness, this is how you can contact me:

- 1) INTERNET. This is monitored usually daily and is the quickest and most reliable means of communication. My email address is: [mthomas@schulich.yorku.ca](mailto:mthomas@schulich.yorku.ca)
- 2) TELEPHONE. 416 988-9750
- 3) OFFICE VISITS. Please make appointments in class, by email or by telephone.

## **Class-by-Class Syllabus**

Topics, readings, and other preparations for every class are listed below. There are OPTIONAL readings and media assigned to each class. These are not covered for the exam but are often informative in giving greater meaning to the class room discussion. Note: If any changes in this schedule become necessary, notifications will be posted on the course CMD, and when changes need to be announced between classes, an email will be sent to students' Lotus Notes email accounts, notifying them of the change.

### **Class 1      Decision Making as a Process** **Sept 19      Understanding the Structure of a Decision**

We introduce decision making in organizations as a process that can be improved using some relatively simple tools and concepts. This is imperative for solving the messy problems facing organizations in the age of "big data". We start along the process of better decision making by examining ways to describe problems and situations to understand their root causes, stakeholders and drivers for improvement.

#### **Key Concepts**

- Analytics based decision making
- Decision making biases and bounded rationality
- Organizational dynamics and decision making
- Improvement thinking: The 5 Whys, Fishbone diagrams, What-if Analysis

#### **Readings:**

- 1) "Deciding How to Decide" Harvard Business Review, November 2013. HBSP
- 2) "Keep Up With Your Quants" Harvard Business Review, July-August 2013 HBSP
- 3) Chapter 1 "What Is Business Analytics?"

4) Behavioral Economics for Kids (Download from CMD) **THIS IS FOR AN ASSIGNMENT DUE SEPT 18 BY MIDNIGHT**

**Questions for the Readings:**

- 1) Where should non-technical managers concentrate to be more effective in making data intensive decisions?
- 2) What are the possible tools that might make large organizations more effective in making decisions?
- 3) In the “IMBA 5001 Contemporary Challenges and Strategic Thinking” how might we manage the major global risks confronting managers?

**Case Study:** Trans Canada Satellite Part 1 (Download from CMD. Read once.)

**Questions for the Trans Canada Satellite Part 1 Case Study:**

- 1) What is the objective of the decision? What are the priorities?
- 2) What would the influence diagram look like for this decision?
- 3) How might the various stakeholders in the decision view what is important differently?

**Assignment and Questions About Behavioral Economics For Kids**

Read this short but fun article about the irrational things we do when making decisions as told from the perspective of a kid. The 15 phenomena the authors describe cover a lot of the field of behavioral economics. In a maximum of 2 pages, single spaced (no smaller than 12-point font) pick 4 of the 15 phenomena that you have experienced as being the most challenging in your own personal decision making. For each provide an example that you would be able to discuss in class.

**YOU ARE GOING TO E-MAIL THIS TO ME NO LATER THAN MIDNIGHT ON SEPTEMBER 18. PLEASE PUT “IMBA 5002 Assignment from (your name)” in the subject line of the e-mail.**

**Class 2  
Sept 20**

**Sizing Up The Situation with Quantitative Data**

Statistics has the power to summarize and put in perspective important situations. Used poorly they can obscure the true nature of the decision-making situation. In this class, we focus on some basic statistical concepts that use quantitative data to describe and assess key relationships. Our goal is to be able to take uncertain situations and provide insights using data that support good decision making.

**Key Concepts**

- What is “average”? (Measures of Central Tendency)
- What should we normally expect? (Variance and Distributions)
- How confident can we be about our analysis? (Error and Confidence)
- How likely is something to happen? (Probabilities and Distributions)
- When are things related to each other? (Correlation and Regression)

## Readings:

Chapter 2 Descriptive Statistics  
Chapter 7 Linear Regression

## Online Media (OPTIONAL)

Common Statistical Abuses as described by a statistician  
<http://www.ics.uci.edu/~jutts/AmerStat2003.pdf>

Using the Central Limit Theorem and the Implications for Sampling and Estimating  
[http://www.nytimes.com/2013/09/24/science/as-normal-as-rabbits-weights-and-dragons-wings.html?\\_r=1&](http://www.nytimes.com/2013/09/24/science/as-normal-as-rabbits-weights-and-dragons-wings.html?_r=1&)

Using Excel to Do Descriptive Statistics  
[http://ire.org/media/uploads/car2013\\_tipsheets/excel\\_stats\\_nicar2013.pdf](http://ire.org/media/uploads/car2013_tipsheets/excel_stats_nicar2013.pdf)

AND

<http://trendingsideways.com/index.php/learn-data-analysis-for-excel-in-2-5-hours-part-1-enabling-the-toolpak-and-regression-analysis/>

How Correlation Differs from Linear Regression  
<http://www.graphpad.com/support/faqid/1141/>

Problems with Interpreting Correlations  
<https://www.utexas.edu/courses/bio301d/Topics/Correlation/Text.html>

## Assignment (to be handed in at the very start of class on paper)

Chapter 2, Questions 19 and 21 p. 68-69  
Chapter 7, Question 9 p. 360

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**Class 3**  
**Sept 27**

## Generating Alternatives and Their Evaluation

Providing we know what are the important elements of a decision and the decision-making context, managers move on to generate alternatives for action (or no action) and a means of choosing which actions are best given the situation. Generating alternatives is a creative process followed by a disciplined approach to winnowing down those alternatives using appropriate and consistently applied selection criteria. Cost Benefit analysis using accounting data is one common way of evaluating decision alternatives whether in a capital budgeting or investment decisions. A constant concern is identifying hidden or unvalued variables that put decisions at risk.

### Key Concepts

- Decision Trees and Expected Value

- Sensitivity Analysis
- Conditional Probabilities
- Value of Information

**Readings:**

Chapter 15 Decision Analysis (Concentrate on Sections 15.1, 15.3, 15.4, 15.5)

**Assignment (to be handed in at the very start of class on paper)**

Question #15 p. 793 (also draw the decision tree to describe the decision)

**Class 4  
Oct 4**

**Evaluating Risks and Trade-offs in Group Decision Making**

No plan survives contact with human behavior. Sensitivity to stakeholders is one way to anticipate risks and fully understand the costs and benefits of alternatives. Often there are trade-offs between objectives and the efficacy of the means to achieve them in terms of accommodating stakeholders and risk. Where we will be tempted to focus on the methods for weighing the financial costs and benefits there are greater social and economic cost and benefits to be considered. This can be challenging because of the quantitative nature of the former and the qualitative nature of the later.

**Key Concepts**

- Balancing Qualitative and Quantitative Data
- Risk Analysis
- Challenging Assumptions Behind Trade-offs
- Cost Benefit Analysis
- Group Decision Making

**Reading:** An Economic Framework for Assessing Development Impact HBSP 9-202-052. You will want to read this to aid in your analysis of the case study Nghe An Tate and Lyle Sugar Company (Vietnam) for Class 6

**Case Study:**

Trans Canada Satellite Part 2 (TBD in class as part of Exercise)

**Questions for the Reading**

- 1) What perspectives other than financial returns might influence the evaluation of alternatives in business decision making (i.e., capital budgeting, project selection, etc.)?
- 2) How do you incorporate these other perspectives into a decision-making process?

**Class 5  
Oct 11**

**Financial Calculation Tools Tutorial**

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We will review basic time value of money concepts and learn how to use the financial calculator or Excel to solve problems. The key concepts include the present value, the future value, cash inflows/outflows, interest rate, and compounding frequency. We will cover the following problems: lump sums, annuities, perpetuities, and uneven cash flows.

Please use this web link for instructions on how to use your brand of financial calculator.  
[http://www.tvmcalcs.com/calculator\\_index](http://www.tvmcalcs.com/calculator_index)

**Reading:**

Chapter 5 and 6 from Fundamentals of Corporate Finance with Connect Access Card, Ross, Westerfield, Jordan, and Roberts. 9th Canadian Ed., ISBN-13:978-125908758-5

**Questions for the reading:**

Chapter 5: Problems 1-5, 16

Chapter 6: Problems 4, 5, 7, 8, 14, 15, 16, 43, 44

**FYI, the financial calculators used to demonstrate in class:**

Texas Instruments BA II Plus and HP 12C

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**Class 6  
Oct 18**

**Communicating the Decision**

You will be presenting your group's results from analyzing the case study. The group will be evaluated on both the content of their analysis but also how well they defend their work to a critical audience of stakeholders. Groups will receive feedback from the instructor on the quality of their 15-minute presentation. We will conclude the class with a brief discussion of the challenges involved in the process of formulating and delivering the analysis. Groups will be handing in their reports at the end of the class.

**Note: this is the first session of the day. The exam session follows after this.**

**Key Concepts**

- Structuring the communication of a complex decision and supporting analysis
- Delivering a compelling "story" in a presentation

**Case Study:** Nghe An Tate and Lyle Sugar Company (Vietnam) HBSP

**Questions for Case Study:**

Your team is advising Ewan Cobban. Should the IFC invest in the sugar plant? Why or why not?

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

### *Due Date*

Sept 18,20 and 27 Assignments:  
Please see the details for Classes 1, 2 and 3. If the assignment is not handed in or is not understandable the grade is 0. Each note is to be handed in on paper at the start of the class it is discussed. Note that the assignment for Class 1 is also to be submitted by e-mail by midnight September 18.  
*Max length: 2 pages for Assignment 1. Assignments for Classes 2 and 3 as long as need be.*  
*Value: 3 x10 =30%*

Oct 18 Group Report and Presentation:  
At the start of the course, students will be placed in groups of 5 people by the instructor. Throughout the week the group will develop the case study “Nghe An Tate and Lyle Sugar Company (Vietnam).” In a Class 6 presentation, the groups will present a report on a case study which integrates some of the topics of the course. The report is to be no more than 6 well-written pages excluding exhibits. The presentation is to be no longer than 15 minutes using PowerPoint. The report is to be handed in at the end of Class 6.  
*Max length: 6 pages*  
*Value: 25%*

Everyday Participation:  
Your grade will be based on the frequency and quality of contributions to in-class discussions. Good quality participation reflects the preparation of the assigned readings, fits into the discussion, is helpful to the learning of others and shows respect for the fact that others in the class would also like to participate.  
*Max length: All 6 classes*  
*Value: 10%*

Oct 18 Exam  
This is a 90 minute, open book, in-class exam composed of short answer questions covering all the material in the course.  
*Max length: 90 minutes*  
*Value: 35%*

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

Grades at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

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

For more details on the index, grading policy, and grade point average (GPA) requirements, **consult your student handbook**.

*Academic honesty* is fundamental to the integrity of university education and degree programs, and applies in every course offered at Schulich. Students should familiarize themselves with York University's policy on academic honesty, which may 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.

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

## Quick Reference: Summary of Classes, Activities and Deliverables

Class No., Title and Date	In-Class Case/Exercise	Reading Preparation (excluding cases and optional readings)	Written Preparation
Class 1 Sept 19 Decision Making as a Process Understanding the Structure of Decision	Trans Canada Satellite Part 1 (On CMD)	1) "Deciding How to Decide" Harvard Business Review, November 2013. HBSP 2) "Keep Up With Your Quants" Harvard Business Review, July-August 2013 HBSP 3) Chapter 1 "What Is Business Analytics?" 4) Behavioral Economics for Kids (Download from CMD)	Assignment on Behavioral Economics (See Class 1 Description) <b>NOTE: THIS IS E-MAILED TO INSTRUCTOR BY SEPTEMBER 18 BEFORE MIDNIGHT and handed in on paper in class</b>
Class 2 Sept 20 Sizing Up The Situation with Quantitative Data		Chapter 2 Descriptive Statistics Chapter 7 Linear Regression	Chapter 2, Questions 19 and 21 p. 68-69 on paper  Chapter 7, Question 9 p. 360 on paper
Class 3 Sept 27 Generating Alternatives and Their Evaluation		Chapter 15 Decision Analysis (Concentrate on Sections 15.1, 15.3, 15.4, 15.5)	Question 15 p. 793 (also draw the decision tree to describe the decision) on paper
Class 4 Oct 4 Evaluating Risks and Tradeoffs in Group Decision Making	Trans Canada Satellite Part 2 (distributed in class)	An Economic Framework for Assessing Development Impact HBSP 9-202-052	
Class 5 Oct 11 Financial Calculation Tools Tutorial, Evaluating Financial Risk and Return of Alternatives over Time		Chapter 5 and 6 from Fundamentals of Corporate Finance with Connect Access Card. 9th Canadian Ed., ISBN-13:978-125908758-5	
Class 6 Oct 18 Communicating the Decision	Nghe An Tate and Lyle Sugar Company (Vietnam) HBSP		Nghe An Tate and Lyle Sugar Company (Vietnam) HBSP
Class 7 Oct 18	Final Exam		

# Course Change Proposal Template

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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 IMBA Program*

**2. Course Number and Credit Value**

*IMBA 5100 1.50*

**3. Course Title**

**a) Long Course Title**

*IMBA 5100 Integrative Management Experiences I*

**b) Short Course Title**

*As above*

**4. Existing Pre-requisites/Co-Requisites**

*N/A*

**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)
<b>X</b>	<b>in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)</b>
	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)**

*Summer 2019*

**7. Academic Rationale**

*These adjustments bring the course descriptions contained in the MBA handbook in line with the course description approved in the program redesign completed in W18*

**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><del>This course is multi-functional multi-disciplinary that builds on the analytical skills students are learning in each of the functional core courses during Term 1. Students will analyze an organization and its corresponding industry in order to assess the key risks (strategic, financial, organizational, regulatory, and competitive) facing them.</del></p>	<p>This multi-functional and multi-disciplinary course builds on the analytic skills students are learning in each of the functional core courses taught in Term 1. Students will analyze an organization and its corresponding industry in order to assess the key risks facing international firms or firms interested in international expansion.</p>

**9. Consultation**

**Originator**

<p>Tom Medcof _____ Signature</p>	<p>1/31/19 _____ Date</p>
<p>Tom Medcof _____ Name</p>	<p>IMBA _____ Area or Specialization</p>

**Approvals:**

**Area or Specialization**

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

<p>Ashwin Joshi _____ Signature</p>	<p>1/31/19 _____ Date</p>
<p>Ashwin Joshi _____ Name</p>	<p>MBA Program Director _____ Area or Specialization</p>

**Degree Program**

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

<u>Tom Medcof</u>	<u>1/31/19</u>
Signature	Date

<u>Tom Medcof</u>	<u>IMBA</u>
Name of Program Director	Program

**Program Committee**

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

<u>Detlev Zwick</u>	<u>March 14, 2019</u>
Signature	Date

<u>Detlev Zwick</u>	<u>MPC-PCC</u>
Name of Committee Chair	Committee

**COURSE OUTLINE – Fall 2018**

**Classroom Information**

DATE	DAY	ROOM	TIME
September 5th	Wednesday	S128	9.30am to 12.30pm; 1.30pm to 5.30pm
October 13th	Saturday	E118	9am to 12pm; 1pm to 4pm
November 3rd	Saturday	E118	9am to 12pm; 1pm to 4pm
November 17th	Saturday	E118	9am to 12pm; 1pm to 4pm
December 1st	Saturday	E118	9am to 12pm; 1pm to 4pm
December 15th	Saturday	E118	9am to 12pm; 1pm to 4pm

**Instructor Information**

Name: Ashwin W. Joshi, Phd  
 Office: N325  
 Email: [ajoshi@schulich.yorku.ca](mailto:ajoshi@schulich.yorku.ca)  
 Tel: 647-409-7302

**Administrative Support Information**

Name: Mima Gualtieri  
 Office: N203A  
 Email: [imba@schulich.yorku.ca](mailto:imba@schulich.yorku.ca)  
 Tel: 416-736-5942

Ashwin W. Joshi is Associate Professor of Marketing and Director of the MBA Program at the Schulich School of Business. Ashwin has taught across the BBA, MBA, EMBA, and the Ph.D. Programs at Schulich. Ashwin has worked with companies around the world on professional development engagements in the areas of marketing strategy, new product development, and analytical and presentation skill development.

**Brief Course Description**

The focus of this course is upon multi-national firms. Specifically, the focus is on three issues pertaining to these firms: (i) How they are structured, (ii) Why they are structured the way they are structured, and (iii) What changes if any will make them more resilient for the future. In this course, students will learn tools, concepts, and methodologies, that will enable them to develop structured responses to these issues. As part of this process, students will also be required to integrate the knowledge they acquire from their core courses in order to develop a comprehensive response to these issues.

Prerequisite and co-requisite: Term 1 courses in the IMBA program.

**Contents**

ITEM	PAGE NUMBER ON COURSE OUTLINE
Course Learning Outcomes	2
Deliverables at a Glance	3
Course Materials	4
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## Course Learning Outcomes

**Integrate Knowledge from the Core Courses:** During the Fall term, you will be taking courses in the following functional areas: Financial Accounting, Managerial Accounting, Organizational Behavior, Finance and Economics. In the present course (i.e., Integrated Management Experiences – 1), you will have the opportunity to integrate knowledge from each of the functional area courses in describing, assessing, and recommending changes in structure/strategy to a multi-national firm of their choice.

**Develop Research Skills:** While you learn key concepts in the core courses, in this course, you will learn to apply these concepts in the context of a particular multi-national firm. This will require you to develop hypotheses about the company based on your understanding of the key concepts in the core courses and to test these hypotheses using secondary data that you will be collecting about your chosen company. In short, you will learn research skills, that is, you will learn how to develop hypotheses and to test them using company data.

**Develop Strategic Thinking Skills:** In this course, you will learn to (a) identify business challenges, (b) analyze the company and its external environment to establish the root cause(s) of these business challenges, (c) develop alternative approaches to resolving the business challenges, (d) evaluate these alternative approaches to land on a recommended approach, and (e) articulate the steps that need to be implemented – and the sequence in which they are to be implemented – in order to comprehensively address these challenges.

**Develop Strategic Story-telling Skills:** Whereas strategic thinking leads to the development of a strategy, this strategy has to be sold internally in order for the organization to become aligned with the strategy. In this course, you will learn how to develop presentation story-boards that will enable you to convey your strategy in an effective and efficient manner to your audiences.

**Develop Presentation Skills:** In addition to learning how to develop presentation story-boards, you will also learn how to deliver presentations. Over the term, you will make numerous presentations both individually and as part of a team. The intent is to create a sense of comfort in your toward the task of presenting your ideas to audiences.

### **Course Format: How the Learning Outcomes will be attained**

We will use a mix of (a) Lectures, (b) In-Class Exercises, (c) Outside-of-Class Group work, and (d) In-Class Presentations, to attain the learning objectives.

The purpose of the lectures will be to introduce key concepts and methodologies that will enable you to integrate the functional knowledge that you are acquiring over the course of the term. The in-class exercise will be focused on applications of the key concepts to real world situations. Given the nature of this course, you will work extensively in groups and much of this activity will occur outside of the stipulated class meeting times. I will give you clear milestones in terms of what is expected from you and by when. This information is intended to help you schedule your team meetings. Finally, you will be required to make a number of in-class presentations. The purpose of these presentations is to grow your comfort level with presenting and to develop your ability to sell your ideas to audiences.

## Deliverables at a Glance

The table below provides information on the mark allocations to each of the deliverables that are discussed above.

DATE	ASSIGNMENT	QUANTITY	%WEIGHT	%TOTAL	AUTHOR
Sept. 5th	Lululemon Case Presentation	1	20	20	Group
Oct. 13th	Describe – your chosen multi-national firm	1	10	30	Group
Nov. 3rd	Assess – your chosen multi-national firm	1	10	40	Group
Nov. 17th	Recommendations – for your chosen multi-national firm	1	10	50	Group
Dec. 1st	Describe + Analyze + Recommend	1	20	70	Group
Dec. 15th	Final Formal Presentation	1	30	100	Group
All Dates	All assignments	6	0% but marks deducted for failure to present	100	Individual

For details, see “Written Assignments/Projects: Descriptions” (p.7) and “Evaluation ...” (p. 10).

This is a presentation intensive course. You will make a number of presentations both as part of a group and as individuals. As the Deliverables at a Glance table makes clear, there are six group presentations. NOTE: all individuals are required to be active contributors to the group presentations. In addition, before each group presents, I will be calling upon 1 or 2 individuals from each presenting team to make a presentation in response to a specific question (e.g., what is your greatest strength?). Each individual presentation will be between 3 and 5 minutes in length.

## Course Material

The instructor will post the lecture notes and any additional reading materials on the Group Database in Outlook prior to each lecture. There is no course kit for this course.

The *Group Database* has been created within Schulich’s Outlook platform. It contains general information for Schulich students and information and materials specific to this course. Please check it frequently.

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

**Attendance.** Attendance in class is a requirement for this course and your attendance is expected for the full duration of each class. The dates and times of our meetings are noted on p. 1 of this document. Note that attendance will be taken for each class. Please inform the instructor before the class if you need to miss the class. Permissible reasons to miss class are a job interview, illness (note from a medical professional required) or participation in a sanctioned Schulich school activity (note required).

**Preparation.** This course will be conducted in a highly interactive format. You are expected to come to class well-prepared and ready to participate, and contribute your ideas, insights and analyses.

**Class Participation (contribution).** At the beginning of each class, individuals will be called at random to make a brief presentation on a generic topic (e.g., What are your greatest strengths?). Class participation will be evaluated by the instructor based on the quality individual presentations that each student makes over the course of the term. NOTE: class participation has negative marks assigned to it. In other words, if – when called upon to present (based on a random draw) – you fail to present, then 3 marks will be deducted from your total mark for the course. This penalty will apply each time that you fail to present.

## Class-by-Class Syllabus

**Background to the Class-by-Class Syllabus.** Each student team (n = 6 students) will identify one company that meets the following criteria:

- (a) It is a multi-national company
- (b) It is headquartered in Canada
- © It is publicly traded on the Canadian stock exchanges.

The learning vehicle for this course is a publicly traded Canadian multi-national company. Each student team will apply the knowledge acquired from the core courses to address three objectives:

- (i) DESCRIBE the operations of the company in terms of the scale of its operations across geographies,
- (ii) ASSESS the company's performance of its operations across geographies in terms of strengths/weaknesses in light of the opportunities/threats within each geography, and
- (iii) RECOMMEND changes to its international footprint based on the challenges that have been uncovered in the analysis stage.

In the table below (Table 1), specific questions associated with each of the research objectives are identified. Student teams will be required to address these questions as part of their IME Project. Answering these questions will require students to integrate the knowledge they have acquired in the core courses. The table identifies the precise knowledge streams that are integrated in response to each question.

**TABLE 1**  
**Presentation Objectives**

<b>DESCRIBING THE FIRM AND IT'S GLOBAL REACH</b>	<b>ASSESS THE FIRM AND IT'S GLOBAL REACH</b>	<b>RECOMMENDATIONS TO STRENGTHEN THE GLOBAL BUSINESS</b>	<b>Relevance to Term 1 Courses</b>
WHAT does the company do?	What are its strengths/weaknesses? Assess its domestic industry environment.		
DESCRIBE its overall financial performance	Identify negatives/positives		Financial Accounting; Finance; Management Accounting
WHICH regions/countries does it operate in?	Assess its global spread.	Which region to expand/contract	Regional Analysis
WHY has it chosen these regions/countries?	Assess the rationale for the places the country is in and the places it is not in.		Regional Analysis
HOW does it operate in these regions/countries? (what is its mode of entry each region?)	Assess the different equity exposures across regions.	Optimal equity exposure	Finance; Management Accounting; Financial Accounting
Describe its financial performance in these regions/countries.	Which are the best/worst regions/countries.	How to maintain best and repair worst?	Financial Accounting; Finance; Management Accounting

### **Class-By-Class Schedule**

We will be meeting six times, each meeting being seven hours in length (exact date/time details are presented below).

Class 1 of 6: September 5<sup>th</sup> (9.30am to 5.30pm) Room S128

In this class, I will provide you with the intellectual toolkit that you will need to (i) DESCRIBE, (ii) ASSESS, and (iii) RECOMMEND changes, to a multi-national firm. We will do this using a publicly traded Canadian multi-national company (naturally, this makes this company ineligible for selection by the student teams).

We will also cover my expectations for the IME 1 project and for each of the presentations from Class 2 to Class 6.

Presentation Schedule:

2.30pm to 2.50pm: Team 1; 3pm to 3.20pm: Team 2; 3.30pm to 3.50pm: Team 3; 4pm to 4.20pm: Team 4; 4.30pm to 4.50pm: Team 5; 5pm to 5.20pm: Team 6.

Class 2 of 6: October 13<sup>th</sup> (9am to 4pm) Room E111

In class 2, each student team will make a presentation in which they will answer all of the questions in the DESCRIBE column of Table 1. Each team will have 1 hour – 40 minutes for the presentation and 20 minutes for my questions and discussion.

Presentation Schedule:

9am to 10am: Team 6; 10am to 11am: Team 1; 11am to Noon: Team 4; Noon to 1: LUNCH; 1pm to 2pm: Team 3; 2pm to 3pm: Team 2; 3pm to 4pm: Team 5

Class 3 of 6: November 3<sup>rd</sup> (9am to 4pm) Room E111

In class 3, each student team will make a presentation in which they will answer all of the questions in the ASSESS column of Table 1. Each team will have 1 hour – 40 minutes for the presentation and 20 minutes for my questions and discussion.

#### Presentation Schedule:

9am to 10am: Team 5; 10am to 11am: Team 2; 11am to Noon: Team 3; Noon to 1: LUNCH; 1pm to 2pm: Team 4; 2pm to 3pm: Team 6; 3pm to 4pm: Team 1

#### Class 4 of 6: November 17<sup>th</sup> (9am to 4pm) Room E111

In class 4, each student team will make a presentation in which they will answer all of the questions in the RECOMMEND column of Table 1. Each team will have 1 hour – 40 minutes for the presentation and 20 minutes for my questions and discussion.

#### Presentation Schedule:

9am to 10am: Team 4; 10am to 11am: Team 1; 11am to Noon: Team 5; Noon to 1: LUNCH; 1pm to 2pm: Team 6; 2pm to 3pm: Team 3; 3pm to 4pm: Team 2

#### Class 5 of 6: December 1<sup>st</sup> (9am to 4pm) Room E111

In class 5, each student team will make a comprehensive presentation that covers all three objectives and the associated questions in Table 1. Each team will have 1 hour – 40 minutes for the presentation and 20 minutes for my questions and discussion.

#### Presentation Schedule:

9am to 10am: Team 2; 10am to 11am: Team 3; 11am to Noon: Team 6; Noon to 1: LUNCH; 1pm to 2pm: Team 4; 2pm to 3pm: Team 4; 3pm to 4pm: Team 5

#### Class 6 of 6: December 15<sup>th</sup> (9am to 4pm) Room E111

In class 6, each student team will deliver their final presentation. This covers all three objectives and the associated questions in Table 1. The final presentation incorporates all my comments from meeting 5. Each team will have 1 hour – 40 minutes for the presentation and 20 minutes for my questions and discussion.

Note: There will be at least one other individual (in addition to me) that will attend and evaluate the final presentation.

#### Presentation Schedule:

9am to 10am: Team 6; 10am to 11am: Team 1; 11am to Noon: Team 2; Noon to 1: LUNCH; 1pm to 2pm: Team 5; 2pm to 3pm: Team 3; 3pm to 4pm: Team 4.

## Written Assignments/Projects: Descriptions

Date: Class 1 of 6 – September 5<sup>th</sup>

Deliverable 1 of 6: Presentation deck for the Lululemon Case. Using the methodology that we discuss in the class, each team will create a presentation deck that covers the following sections:

Section One: Description of Lululemon's international footprint

Section Two: Assessment of Lululemon's international footprint

Section Three: Recommendations for changes to Lululemon's international footprint.

Length: Each team will be given 20 minutes to make their presentation. The number of slides should be commensurate with this time limit.

#### Presentation Schedule:

2.30pm to 2.50pm: Team 1; 3pm to 3.20pm: Team 2; 3.30pm to 3.50pm: Team 3; 4pm to 4.20pm: Team 4; 4.30pm to 4.50pm: Team 5; 5pm to 5.20pm: Team 6.

Value: 20%

Date: Class 2 of 6 – October 13<sup>th</sup>

Deliverable 2 of 6: Presentation deck for DESCRIBING the multi-national firm. This deck will

address all of the questions outlined in the DESCRIBE column in Table 1.

Length: Each team will be given 60 minutes to make their presentation. The number of slides should be commensurate with this time limit.

Presentation Schedule:

9am to 10am: Team 6; 10am to 11am: Team 1; 11am to Noon: Team 4; Noon to 1: LUNCH; 1pm to 2pm: Team 3; 2pm to 3pm: Team 2; 3pm to 4pm: Team 5

Value: 10%

Date: Class 3 of 6- November 3rd

Deliverable 3 of 6: Presentation deck for ASSESSING the multi-national firm. This deck will address all of the questions outlined in the ASSESS column in Table 1.

Length: Each team will be given 60 minutes to make their presentation. The number of slides should be commensurate with this time limit.

Presentation Schedule:

9am to 10am: Team 5; 10am to 11am: Team 2; 11am to Noon: Team 3; Noon to 1: LUNCH; 1pm to 2pm: Team 4; 2pm to 3pm: Team 6; 3pm to 4pm: Team 1

Value: 10%

Date: Class 4 of 6– November 17<sup>th</sup>.

Deliverable 4 of 6: Presentation deck for RECOMMENDING changes to the multi-national firm. This deck will address all of the questions outlined in the RECOMMEND column in Table 1.

Length: Each team will be given 60 minutes to make their presentation. The number of slides should be commensurate with this time limit.

Presentation Schedule:

9am to 10am: Team 4; 10am to 11am: Team 1; 11am to Noon: Team 5; Noon to 1: LUNCH; 1pm to 2pm: Team 6; 2pm to 3pm: Team 3; 3pm to 4pm: Team 2

Value: 10%

Date: Class 5 of 6 - December 1st:

Deliverable 5 of 6: Presentation deck for the DESCRIBE + ASSESS + RECOMMEND sections of your presentation (see Table 1). This is a dry run for your final presentation.

Length: Each team will be given 60 minutes to make their presentation. The number of slides should be commensurate with this time limit.

Presentation Schedule:

9am to 10am: Team 2; 10am to 11am: Team 3; 11am to Noon: Team 6; Noon to 1: LUNCH; 1pm to 2pm: Team 4; 2pm to 3pm: Team 4; 3pm to 4pm: Team 5

Value: 20%

Date: Class 6 of 6- December 15<sup>th</sup>.

Deliverable 6 of 6: FINAL Presentation deck for the DESCRIBE + ASSESS + RECOMMEND sections of your presentation.

Length: Each team will be given 60 minutes to make their presentation. The number of slides should be commensurate with this time limit.

Presentation Schedule:

9am to 10am: Team 6; 10am to 11am: Team 1; 11am to Noon: Team 2; Noon to 1: LUNCH; 1pm to 2pm: Team 5; 2pm to 3pm: Team 3; 3pm to 4pm: Team 4.

Value: 30%

Please see the “Deliverables At A Glance” section on p. 2 for more detailed information. For each assignment, we will discuss the requirements in detail in class. The instructor will also post a detailed grading grid on CMD several weeks before each assignment is due. The grading grid will detail the requirements for each assignment and the grading components and weightings. Finally, students are encouraged to ask the instructor for help or clarification if they are having difficulty with a specific aspect of an assignment.

Since the course is based on group work, it is critical to ensure that free-riding does not occur. Each student will receive qualitative (after Class 3) and quantitative (after Class 3 and after Class 5) from their group.

The qualitative feedback will entail an assessment by the group of each individual in two areas. This will be submitted by the group to each individual member at the end of Class 3. All evaluations will be submitted to the instructor as well. The evaluation will cover two areas:

- (a) The Individual’s Strengths
- (b) Areas that the individual needs to improve upon

With respect to the quantitative feedback, each group will submit the following form to me after your Class 3 and Class 5 presentation.

NOTE:

- (i) The total in column 3 should be 0.
- (ii) This has to be a consensus decision by the group.
- (iii) I may or may not use this information to assign grades to individual group members.

Group Number:

Client Name:

GROUP MEMBER NAMES	STUDENT NUMBER	Grade (+2; +1; 0; -1; -2)	Signature
1.			
2.			
3.			
4.			
5.			
6.			

Penalty for late submission is as follows:

If your presentation is not ready on each date, you will receive a mark of zero for that component of the course. Given the nature of this course, late submission is not an option.

**Calculation of Course Grade**

In this class, final course grades will be determined by the following process: Each piece of work during the term will receive a numerical grade out of 100%. At the end of the term, the instructor will calculate a final numerical grade out of 100% according to the weightings of each assignment. The translation formula to translate numerical grades into letter grades is presented in a Table in the section below (see Table 2).

Please note the requirements for student attendance on p. 4 above in the section entitled “Student Attendance, Preparation For Class and Class Participation: Expectations”.

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

*Grades* at Schulich are based on a 9-value index system. The top grade is A+ (9) and the minimum passing grade is C- (1). To keep final grades comparable across courses, sections of required core courses are normally expected to have a mean grade between 4.7 and 6.1.

The Schulich School does not use a percentage scale or prescribe a standard translation formula from percentages to letter grades. Please note the **translation formula** that we will be using in this course:

**TABLE 2**  
**Translation Formula**

GRADE	GRADE POINT	PERCENTAGE
A+	9	95-100
A	8	90-94.4
A-	7	85-89.4
B+	6	80-84.4
B	5	75-79.4
B-	4	70-74.4
C+	3	65-69.4
C	2	60-64.4
C-	1	50-59.4
F	0	49.4 and below

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/Presentations (Absence from)*

*Mid-term/Presentation.* Students who miss a mid-term examination/presentation must contact their course instructor within 24 hours and provide the course instructor with documentation substantiating the reason for the absence. A copy of the documentation must also be submitted to Student Services; it will be placed in the student's file.

*Final/Presentations.* Within 24 hours of missing a final examination/presentation, students must contact the Director of Student Services, at (416) 736-5060 and must also contact their course instructor. Formal, original documentation regarding the reason for missing the exam must be submitted to the <Director of Student Services, Associate Director, Graduate Programs Unit> (SSB Room W262) within 48 hours of missing the final exam/presentation. 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**

<b>DATE</b>	<b>IN-CLASS ACTIVITY</b>	<b>REQUIRED READING</b>	<b>REQUIRED DELIVERABLE</b>
September 5th	Lecture/Presentation	Lululemon Case	PPT. Deck
October 13th	Presentation and Feedback - Describe	Company Reports	PPT. Deck
November 3rd	Presentation and Feedback - Assess	Company Reports	PPT. Deck
November 17th	Presentation and Feedback - Recommend	Company Reports	PPT. Deck
December 1st	Presentation and Feedback –Final Presentation Dry Run	Company Reports	PPT. Deck
December 15th	Presentation and Feedback –Final Presentation	Company Reports	PPT. Deck

# Course Change Proposal Template

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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 IMBA Program*

**2. Course Number and Credit Value**

*IMBA 5200 1.50*

**3. Course Title**

**a) Long Course Title**

*IMBA 5200 Integrative Management Experiences II*

**b) Short Course Title**

*As above*

**4. Existing Pre-requisites/Co-Requisites**

*IMBA 5100*

**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 checked="" type="checkbox"/>	<b>in course description (provide course outline; short course descriptions may be a maximum of 60 words, written in present tense)</b>
<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 type="checkbox"/>	other (please specify)

**6. Effective Session of Proposed Change(s)**

*Summer 2019*

**7. Academic Rationale**

*These adjustments bring the course descriptions contained in the MBA handbook in line with the course description approved in the program redesign completed in W18*

**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>IMBA 5200 0.00 Integrative Management Experience II</p> <p>This multi-functional and multi-disciplinary course will build on the analytical skills that students are acquiring in each of the core functional courses during Term 2. Students will analyze and discuss five cases to learn how to apply and integrate the strategic, marketing, operations and regional analysis concepts, tools and frameworks they learn concurrently throughout Term 2.</p>	<p><i>IMBA 5200 1.50 Integrative Management Experiences II</i></p> <p><i>This multi-functional and multi-disciplinary course builds on the analytic skills students have acquired in Integrative Management Experiences I. Students analyze and discuss five cases and also apply and integrate the strategic and marketing concepts, tools and frameworks they are learning in Term 2.</i></p>

## 9. Consultation

### Originator

<p>Tom Medcof</p> <hr/> <p>Signature</p>	<p>1/31/19</p> <hr/> <p>Date</p>
<p>Tom Medcof</p> <hr/> <p>Name</p>	<p>IMBA</p> <hr/> <p>Area or Specialization</p>

### Approvals:

#### Area or Specialization

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

<p>Ashwin Joshi</p> <hr/> <p>Signature</p>	<p>1/31/19</p> <hr/> <p>Date</p>
<p>Ashwin Joshi</p> <hr/> <p>Name</p>	<p>MBA Program</p> <hr/> <p>Area or Specialization</p>

**Degree Program**

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

<u>Tom Medcof</u>	<u>1/31/19</u>
Signature	Date

<u>Tom Medcof</u>	<u>IMBA</u>
Name of Program Director	Program

**Program Committee**

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

<u>Detlev Zwick</u>	<u>March 14, 2019</u>
Signature	Date

<u>Detlev Zwick</u>	<u>MPC-PCC</u>
Name of Committee Chair	Committee

## Course Outline

Winter 2018

Saturdays from 9:00 am – 12 noon and 1:00 pm to 4:00 pm: N108

Wednesday April 11 from 5:30 pm to 10:00 pm: W133

Our first class is on Saturday January 20, 2017 at 9:00 am

### Instructor

Graeme Deans

N205C, Seymour Schulich Building

416 736 2100 x 44603

gdeans@schulich.yorku.ca

Office hours: Immediately before or after class or 5:30 – 6:45 pm Mondays, otherwise please email Instructor to arrange an appointment

### Assistant

Michelle Le

N203A SSB

(416) 736-5942

imba@schulich.yorku.ca

Graeme Deans has over 30 years of management consulting experience with Booz & Company (now Strategy&), AT Kearney and Ernst & Young, and has advised Fortune Global 1000 clients on strategic and operational issues in North America, Asia and Europe. He has also been a part-time instructor at the Schulich School of Business since 2009.

### Brief Description

This multi-functional and multi-disciplinary course will build on the analytical skills that students are acquiring in each of the core functional courses during Term 2. Students will analyze and discuss five cases to learn how to apply and integrate the strategic, marketing, operations and regional analysis concepts, tools and frameworks they learn concurrently throughout Term 2. The cases and management exercise may change from one year to the next.

Prerequisite and co-requisite courses are as follows:

- Co-requisite: IMBA 5201 3.00 (Region Analysis), IMBA 5202 3.00 (Marketing Management in Global Context), IMBA 5203 3.00 (Strategy for the Global Organization), and IMBA 5204 3.00 (Design, Control and Improvement of Processes)
- Pre-requisite: IMBA 5100 0.00 (IME 1) and all first-term IMBA courses

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## Course Learning Outcomes

The objective of this course is to integrate the material learned concurrently in the functional management courses in Term 2: Strategy, Marketing, Region Analysis and Operations. In addition, the course will build on the analytical and assessment skills developed in IME 1 to develop the problem-solving capabilities required for successful international business managers.

The key learning experience in IME 2 will be the opportunity for students to develop and apply their knowledge and integrative skills through the preparation, analysis and discussion of five business cases. The cases will present complex management problems that cut across strategic, operational, marketing and regional issues. Each case explores a different industry, company, business scenario and position in the business life cycle, so students will have the opportunity experience a variety of business challenges and to learn about and discuss opportunities and issues faced by management in multiple business situations.

The course will use a combination of lectures and interactive classroom discussions to explore the business opportunities, issues, interdependencies and trade-offs at the intersection of each of the functional management courses. For example, the trade-offs between global product or service consistency and tailoring a product or service to fit local tastes is a critical issue that occurs at the intersection of Marketing and Region Analysis.

In addition, in each class the instructor will present case studies based on his professional experience to illustrate the concepts we will be learning during the term.

Over the course of the term, students should strive to develop their own perspectives on a structured approach to solving complex business problems and, through the case discussions, have a chance to practice how to apply their approach under simulated business conditions.

By the end of this course, students should feel confident with integrating what they have learned in each of the functional core courses from both Term 1 and 2, and applying those skills to answer key business questions, and identify and capitalize on opportunities, problems and risks facing any company in any industry.

## Deliverables at a Glance

This course will be conducted in a highly interactive format. Students are expected to come to class well-prepared and ready to participate, and contribute their ideas, insights and analyses.

We will discuss a business case in each class. The reason for this is to expose students to several different industries and business situations to improve their analytical skills and business judgment, and to provide them with insights into management tools and levers that may be applied depending on how the company is performing and what its strategic objectives are for the future. We will discuss the following cases:

- Session 1: In our first session, we will discuss the Paragon Tools case, a fictitious case that explores the trade-offs between organic growth and growth by acquisition. We will work through this case together in class and it will not be graded
- Session 2: In our second session, we will discuss the business issues surrounding one of the largest, most successful global product launches ever, the Gillette Sensor razor. This case explores the strategic, marketing, operational and global / regional issues facing Gillette as it prepares to launch its biggest product ever in over 50 countries simultaneously. Each team will prepare a case write-up (~1,000 words and exhibits, if needed) and students should be ready to actively participate in the class discussion.
- Session 3: In this session, students will prepare and present the Consolidated Bakeries case, which examines the strategic, organizational, marketing and operational choices facing a major bread bakery competing across several distinct regional markets in the United States. Each team will make their presentation to panel of senior business executives who will question them on their work and assist in the evaluation of their performance.
- Session 4: In our fourth session, we will discuss the IKEA case. This case examines how IKEA can build on its success in European and global markets and achieve their organic growth targets in the US market.. Each team will prepare a case write-up (~1,000 words and exhibits, if needed) and students should be ready to actively participate in the class discussion.
- Session 5: The final session will consist of an Integrative Management Case Exercise on the company your team has chosen in the Fall term. Students will work with their assigned groups to prepare and present an integrative case analysis on your company. For the purposes of the IME 2 presentation, students will synthesize the most important findings across all four of their core functional courses into a PowerPoint presentation of **a MAXIMUM OF FIVE SLIDES**. The presentation portion will consist of a presentation of 10 minutes followed immediately by a Q&A session of 10-15 minutes.

Drawing on course material from all winter courses you will need to address the following questions about your company:

1. Prioritize the issues facing your company
2. What are your prioritized recommendations to help your company successfully move their business forward (based on the threats and opportunities facing them?) (ie. what should they do?)

For the Q&A, questions will be posed by a panel of instructors from the Winter 2016 courses.

In addition to submitting a paper copy of each case write-up in class, you will have to demonstrate the originality of your work. The easiest way to do this is to submit an electronic copy of it to Turnitin. This is a web-based service that checks for plagiarism. If you want to demonstrate your originality in some other way, you are invited to do so, but your method must be approved by the instructor. Detailed instructions for using Turnitin will be provided.

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
Gillette case write-up	1	15	15	Team
Consolidated Bakeries case presentation	1	20	20	Team
IKEA US case write-up	1	25	25	Team
Company team presentation	1	25	25	Team
Class participation	1	15	15	Individual
			<b>100%</b>	

For details, see “Written Assignments/Projects: Descriptions” (p. 6) and “Evaluation ...” (p. 6).

## Course Material

The cases and required reading for the course is contained in the Course Kit. It is available for purchase from the York University Bookstore (<http://bookstore.blog.yorku.ca>). In addition, the instructor will post the lecture notes and any additional reading materials on CMD prior to each lecture.

*Course kits* are available for purchase from the York University Bookstore.

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 Attendance, Preparation for Class and Class Participation: Expectations

**Attendance.** Attendance in class is a requirement for this course and your attendance is expected for the full duration of each class. As noted on the first page of this document, this course meets on five Saturdays and in the evening of April 13, and attendance will be taken for each class. Please inform the instructor before the class if you need to miss the class. Permissible reasons to miss class are a job interview, illness (note from a medical professional required) or participation in a sanctioned Schulich school activity (note required).

**Preparation.** This course will be conducted in a highly interactive format. You are expected to come to class well-prepared and ready to participate, and contribute your ideas, insights and analyses.

**Class Participation (contribution).** Class participation will be evaluated by the instructor based on the quality and frequency of meaningful contributions by each student over the course of the term. Meaningful contributions, by definition, add insight and depth to the topics and issues we discuss in class (as opposed to repetition of facts). In addition, because all of the assignments will be done in teams, part of the class participation grade will be based on peer review feedback on team members. We will discuss the class participation grading in more detail in the first lecture.

## Class-by-Class Syllabus

### Session 1 (Week 2 / January 20) – Integrative Tools and Techniques For Analyzing Complex Global Business Problems

*Readings:*

- Students **MUST** read the Paragon Tools case (contained in your course kit) before the class. We will be working on the case extensively during the class.

*Session Topics:*

- Instructor and student introductions
- Course overview and objectives
- Discussion and review of some of the most common and frequently-used strategic, operations and marketing frameworks used to understand a company's current business situation and to develop perspectives on a company's future strategic business options
- Detailed discussion of the Paragon Tools case

*Business Skill: Issue Trees*

- This week's business skill focus is on how to develop an analytical framework, or "issue tree", to analyze a business problem and use it to write up a case or prepare a business report

*Assignment:*

- Students are reminded that the Gillette team case write-up is due next class. Students should read the case, write it up as a team and prepare to discuss it and hand it in during the next class. The class will be divided into teams of 4-5 students each, and team composition will remain the same for the term.

**Session 2 (Week 4 / February 3) – Integrating Strategy and Marketing: Gillette Case Discussion**

*Session Topics:*

- Discussion of the Gillette case, and initial feedback
- Discussion of common financial analysis techniques and how they are typically applied in business situations
- Project management and leadership techniques for successful team member participation and team leadership effectiveness
- Discussion and exercises on how to build high-performing teams
- IME in action: Global retailing industry case study

*Business Skill: Brainstorming*

- This week's business skill focus is on how to generate and prioritize innovative ideas using the combined knowledge and experience of a team, in a short period of time

*Assignment:*

- Hand in your team's Gillette case write-up
- Students are reminded that the Consolidated Bakeries case must be prepared for presentation in class at the next session.

**Session 3 (Week 8 / March 10) – Integrating Operations and Regional Analysis: Consolidated Bakeries Discussion**

*Session Topics:*

- Team presentations of the Consolidated Bakeries case, and initial feedback from guests
- We will be joined by Sahar Rahman (VP, Loblaw's) who will assist in the evaluation of student presentations
- Detailed feedback on Gillette case write-up
- Description of the change management methodologies, frameworks and techniques business leaders use to implement recommendations to solve major business problems and manage large transitions and transformations within companies

- IME in action: Three change management case studies

*Assignments:*

- Each team to hand in their PowerPoint slides from the Consolidated Bakeries case presentation
- Each student will complete and hand in a Peer Review Evaluation Form at the end of the session to help the instructors assess the relative contributions of each of their team members. The form will be used by the instructors in allocating individual grades
- Students are reminded that the IKEA US case write-up is due next class. Students should read the case, write it up as a team and prepare to discuss it and hand it in during the next class

**Session 4 (Week 10 / March 24) – Integrating Marketing, Operations and Regional Analysis: IKEA US Discussion**

*Session Topics:*

- Detailed feedback on Consolidated Bakeries case presentations
- Discussion of the IKEA US case
- We will be joined by Andrea Wolfson (Senior Manager, EY Advisory) who will discuss career paths for MBAs and describe her experience as a change management consultant
- Overview of effective means of communication to deliver value to audiences of business executives
  - Logical writing (reports and presentations)
  - Effective, “high-impact” charts and exhibits
  - High-impact presentations
- IME in action: Canadian airline case study

*Business Skill: Effective PowerPoint Slides*

- This week’s business skill focus is on techniques and guidelines to prepare effective PowerPoint presentation slides. We will discuss a practical, 6-point methodology to ensure high-impact, easy-to-present slides and charts.

*Assignments:*

- Hand in your IKEA US team case write-up

**Session 5 (Week 12 / April 7 from 9:00 am to 12 noon only) – Integrated Management Experiences: Sharing International Business Experience**

*Session Topics:*

- Detailed feedback on the IKEA US case write-up
- We will be joined by two business executives with international experience and perspectives, who will share their perspectives and offer advice to students for pursuing successful careers in international business

**Session 6 (Wednesday April 11 from 5:30 pm to 10:00 pm) –Company Team Presentation**

*Session Topics:*

- Team presentations on your company, and initial feedback from professors
- We will be joined by the IMBA Marketing, Strategy, Region Analysis and Operations Professors, who will assist in the evaluation of student presentations

*Assignments:*

- Each team to hand in their PowerPoint slides from the integrative presentation on your company

- Each student will complete and hand in a Peer Review Evaluation Form at the end of the session to help the instructors assess the relative contributions of each of their team members. The form will be used by the instructors in allocating individual grades

## Written Assignments/Projects: Descriptions

### *Due Date*

- Week 4     Gillette Sensor case write-up  
*Requirements to be discussed in class*  
*Max length: 1,000 words, plus up to 10 exhibits*  
*Value: 15%*
- Week 8     Consolidated Bakeries case presentation  
*Requirements to be discussed in class*  
*Max length: Five PowerPoint slides*  
*Value: 20%*
- Week 10    IKEA US case write-up  
*Requirements to be discussed in class*  
*Max length: 1,000 words, plus up to 10 exhibits*  
*Value: 25%*
- April 11    Company team presentation  
*Requirements to be discussed in class*  
*Max length: Five PowerPoint slides for this course (additional requirements for other core courses – instructions to be provided by each Professor)*  
*Value: 25%*

## Evaluation of Written Assignments/Projects

Please see the “Deliverables At A Glance” section on p. 2 for more detailed information. For each assignment, we will discuss the requirements in detail in class. The instructor will also post a detailed grading grid on CMD several weeks before each assignment is due. The grading grid will detail the requirements for each assignment and the grading components and weightings. Finally, students are encouraged to ask the instructor for help or clarification if they are having difficulty with a specific aspect of an assignment.

Penalties for late submission are as follows:

- 5% off immediately if a **hard copy** of your assignment is not submitted by the end of the class in which it is due (ie. at 10:00 pm on the due date)
- An additional 5% off per day for each day the assignment is late, beginning at midnight on the due date

- 10% off if I have to print your paper
- FYI, I do not chase students/teams who haven't handed in papers

### Calculation of Course Grade

In this class, final course grades will be determined by the following process: Each piece of work during the term, including the final exam, will receive a numerical grade out of 100%. At the end of the term, the instructor will calculate a final numerical grade out of 100% according to the weightings of each assignment. Equivalences are as follows:

<u>Percentage</u>	<u>Letter Grade</u>	<u>Number Grade</u>	<u>Comments</u>
Below 50%	F		Failing
50-54	C-	1	Acceptable
55-59	C	2	Acceptable
60-64	C+	3	Acceptable
65-69	B-	4	Good
70-74	B	5	Good
75-79	B+	6	Good
80-84	A-	7	Excellent (Dean's List)
85-89	A	8	Excellent (Dean's List)
90 and above	A+	9	Excellent (Dean's List)

Please note the requirements for student attendance on p. 4 above in the section entitled "Student Attendance, Preparation For Class and Class Participation: Expectations".

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

*Grades* at Schulich are based on a 9-value index system according to the table above. The top grade is A+ (9) and the minimum passing grade is C- (1). Students are reminded that they must maintain a cumulative GPA of at least 4.2 to remain in good standing and continue in the program, and a minimum of 4.4 to qualify for their degree. Please note that the Faculty Council of the Schulich School of Business has established that "...the average grade for core SSB courses offered at the MBA level should be between 4.7 and 6.1". In order to keep grades comparable across courses, this course will be graded in accordance with these grading guidelines.

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

[http://www.schulich.yorku.ca/client/schulich/schulich\\_lp4w\\_ind\\_webstation.nsf/page/Enrolment+Grades+and+Convocation!OpenDocument#tabs-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](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
Week 4. Feb 3 Gillette Sensor case	Gillette Sensor case	Gillette Sensor case	Gillette Sensor case write-up
Week 8. Mar 10 Consolidated Bakeries case presentation	Consolidated Bakeries case	Consolidated Bakeries case	Consolidated Bakeries case presentation
Week 10. Mar 24 IKEA US case	IKEA US case	IKEA US case	IKEA US case write-up
Week 12. Apr 11 Company team presentation	Company presentation	Readings and research on your company from each Winter 2016 course	Company team presentation

### Supplementary Information On Final Presentation

The final presentation on April 11<sup>th</sup> will count for 25% of your final grade in this course as well as 20% of your final grade in the following three core courses: Strategy, Marketing and Regional Analysis. In addition to the presentation, groups are required to write an Integrated Report of 8 pages (font 12, 1.5 spaced) with appendices if necessary. Appendices do not count as part of the 8 pages. You should include Appendices (if necessary) to provide additional information needed for specific core course questions. You need to select a specific region/country that your IME firm currently operates in and answer 2 fundamental questions in your presentation and report:

1. Prioritize the Issues facing your IME firm
2. What are your prioritized recommendations to help your IME firm move its business forward (based on the threats and opportunities facing the firm in the region/market you have chosen?)

The specific core course IME questions you need to address in your presentation and report are given below. Each group has 10 minutes to present and 10-15 minutes to answer questions posed by all Winter core course instructors (~3-5 minutes per instructor for all core courses). As discussed previously, groups are responsible for preparing 5-page PowerPoint presentation and handing out copies to the instructors prior to beginning their presentation. The quality of the presentation will also be considered in your final grade.

### IMBA 5201 - Regional Analysis

When completing your analysis please be sure to consider the following course specific questions and address them in your written report:

- Given the strategy and marketing mix you are recommending to your IME firm for the country/region you have chosen, which factors from the PESTLE framework will be most important for your firm to take into consideration in making their decisions? Why?
- What is the impact on Danone of economic factors in the region you have chosen (eg. Market demand and growth for their type of products, the role of interest rates and currency exchange rates in determining the cost of capital as well as the outsourcing of inputs; the effect of competition and costs such as tariffs, custom fees, currency fluctuations, value-added taxes; the impact of the foreign market's various trade agreements )

### **IMBA 5202 – Marketing Management in Global Context**

Your group will need to pick a specific region (or country) of your choice in which your firm operates. Drawing on course material from all winter courses you will need to address the following questions about your firm in this particular region:

1. Prioritize the Issues facing your firm
2. What are your prioritized recommendations to help your firm move its business forward (based on the threats and opportunities facing the firm in the region/market you have chosen?)

From a marketing perspective, you need to address the following issues:

- Target market (target group within the country/region you have chosen)
- Firm positioning
- Recommended Marketing Mix Strategy and whether or not this strategy is adapted or standardized from what your firm does in Canada.

### **IMBA 5203 – Strategy for the Global Organization**

Your group will need to pick a specific region (or country) of your choice in which Danone operates. Drawing on course material from all winter courses you will need to address the following questions about Danone in this particular region:

1. Prioritize the Issues facing your firm.
2. What are your prioritized recommendations to help your firm move their business forward (based on the threats and opportunities facing them in different markets)?

**From a strategic perspective, your answers to the above two questions should be based on:**

1. *What business are they in? What business should they be in?*
2. *Do they have the resources and capabilities to implement their strategy into the future?*

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

A regular meeting of the Schulich Faculty Council for the 2018-2019 academic year was held on Friday March 15<sup>th</sup> 2019 at 11:30am in room SSB E111.

**In Attendance:**

**Chair:** J. McKellar  
**Secretary:** E. Rush

**Voting Members of Faculty Council Present:**

Senior Administration	D. Horváth, D. Zwick, M. Anisette, M. Judd, M. Szaki		
Student Council Reps	C. Bryan (PhD), J. Paramthillairajah (UBS), J. Prince (GBC)		
ACTG	M. Bamber, C. Cho, K. Kanagaretnam		
ARTM/NMLP			
BSUS			
ECON			
FINE	Y. Larkin, M. Milevsky		
MKTG	E. Fischer, T. Noseworthy, M. Rice		
ORGS	M. Valente, R. Shao, L. Wright		
OMIS	R. Irving		
PLCY	P. Aulakh, W. Sheremata		
PROP		OTHER:	

**Voting Members of Faculty Council Absent:**

E. Auster	B. Durrani (UBS)	H. Kim	D. Neu	J. Tan
K-H. Bae	J. Everett	G. Kistruck	L. Ng	L. Thorne
T. Beechy (ret.)	M. Farjoun	R. Krishna (PhD)	C. Oliver	Y. Tian
R. Belk	J. Flagler (GBC)	M. Kristal	E. Owens-Skidmore	V. Trivedi
C. Bell	B. Gainer	F. Lazar	Y. Pan	K. Varma (GBC)
A. Bhanich-Supapol	M. Giesler	S. Li	R. Phillips	M. Voronov
C. Chan (UBS)	B. Graham (alumni)	Z. Li	E. Prisman	E. Waitzer
D. Cumming	I. Henriques	B. Lyons	K. Punn (GBC)	S. Weiss
Y. Deutsch	S. Hsu	I. Macdonald	S. Qu	B. Wolf
A. Devine	R. Irving	A. Mawani	S. Quail	S. Yeomans
A. Diamant	I. Janiszewski (UBS)	R. Mcclean	A. Rushdi (GBC)	J. Zemans (ret.)
D. Dimick	D. Johnston	J. McKellar	P. Sadorsky	
M. Dong	M. Kamstra	C. Mcmillan	G. Saxton	

**Regrets, Leaves, Sabbaticals:**

M. Biehl	J. Darroch	M. Kipping	P. Shum
A. Campbell	B. Eberlein	M. Levesque	A. Sirsi

M. Cao	C. Graham	A. Madhok	K. Tasa
J. Chung	A. Joshi	D. Matten	A. Tsang
P. Darke	A. Kecskes	T. Peridis	E. Veresiu

**Non-Voting Members of Faculty Council Present**

D. Bell	M. Lefranc	S. Siddik	F. Zandi
T. Fantin	J. Mackay	H. Sinker	
A. Gravel	J. Morgan	T. Smalls	
K. Gray	A. Mustapha	S. Tenn	

**Non-Voting Members of Faculty Council Absent:**

M. Armstrong	E. Farrell	K. Kermer	A. Middleton	A. Shaw
D. Barret	C. Ford	L. Kharlip	R. Moy	S. Sigel
M. Bhutani	M. Freedman	G. Klar	S. Nahm	N. Sutherland
S. Black	F. Gorbet	L. Korhani	C. Niederwanger	T. Tang
E. Caprioni	B. Graham	P. Laycock	M. Orlan	J. Thompson
C. Carder	C. Hantho	R. Leonidas	C. Partland	P. Tsaparis
M. Cernea	A. Harris	T. Loebel	M. Perlis	E. Wang
G. Chen	L. Hillcoat	S. Ly	E. Peters	A. Welsh
M. Cohen	R. Hines	P. Lyman	J. Pinto	B. White
D. Conklin	I. Holzinger	R. Lynn	P. Pivato	J. Wilkins
M. Cowan	B. Horowitz	D. Mak	S. Pulver	J. Wleugel
T. D'Agostino	S. Hussain	A. Makooie	R. Ross	D. Woticky
R. De Costa	T. Javed	K. Mapa	B. Schofield	J. Wu
P. Deonandan	J. Jeyakumar	R. Mayer	W. Schroeder	D. Yundt
P. Dillon	I. Kanga	T. Mcqueen	L. Serras	C. Zhuang

**1. Welcome & Chair's Remarks**

The Chair called the meeting to order, welcomed attendees and provided an overview of the agenda.

**2. Decanal Search Update**

President Rhonda Lenton and Provost Lisa Philipps were in attendance to provide the Council with an update on the Schulich decanal search. A summary of their remarks can be found in the memo included in Appendix 1.

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

**GBC:**

GBC President J. Prince provided an overview of the redesign recently completed to the roles and responsibilities of the GBC. The changes are outlined in the slide set in Appendix 2.

### **PhD:**

PhD Students Association rep C. Bryan indicated that they are currently working on the move of PhD students to the new McEwen Graduate Study and Research Building as well as holding elections for the PhD student representatives.

### **UBS:**

UBS President J. Paramthillairajah indicated that the UBS is currently transitioning to the newly elected representatives for the coming academic year. He also highlighted the ongoing efforts to prepare for the upcoming formal event on April 25<sup>th</sup> as well as the fundraising initiative for the class gift.

## **4. Dean's Remarks**

Dean Horváth thanked the outgoing members of the student governments for their hard work over the past year and welcomed the incoming members. He also provided the following updates on events and achievements in the Schulich community:

- A ribbon cutting ceremony for the new Rob & Cheryl McEwen Graduate Study & Research Building took place on January 10<sup>th</sup>. The building is now open, with offices, classrooms and meeting space all in use. Some work is still being completed to make the building fully functional.
- The Masters-level Launch Week Leaders Panel took place on January 5<sup>th</sup>, with speakers Rob Hines (Schulich CDC), Hana Zalzal (MBA '96, founded of CARGO Cosmetics), and Lisa Marie Chen (MBA 2011, Lead Design Strategist, IBM Watson Analytics).
- A full EMBA class launched in January. IAC member Doug McCuaig was the Keynote speaker at the KS EMBA Welcome Dinner on January 11<sup>th</sup>.
- Faculty hiring for the coming year will include OMIS, ORGS, FINE and ECON.
- The Master of Supply Chain Management (MSCM) will launch in May 2019 and the Master of Management in Artificial Intelligence (MMAI) is on track to launch in September 2019.
- Dean Horváth returned from a trip to New Delhi and Mumbai in February where he met with GM Rao as well as alumni, board members and potential students. He also visited New York City in March where he attended award and alumni events.
- The 11<sup>th</sup> edition of Schulich Start Up Night took place on March 7<sup>th</sup>. The event was a success, with around 350 attendees.
- Finance Professor Pauline Shum-Nolan and 2 PhD students have won 2019 Toronto CFA Society-Hillsdale Research Award.
- The Schulich team placed 2<sup>nd</sup> overall at the MBA Games. They placed 1<sup>st</sup> in Spirit and 2<sup>nd</sup> in Athletics.
- The Schulich MFIN team has qualified for the final round of the National Investment Banking Competition.
- The Schulich team placed 3<sup>rd</sup> overall at the HEC Montréal CSR Case Competition.
- The Schulich team placed 2<sup>nd</sup> overall at the 2019 L'Oréal Brandstorm National Finals.
- Schulich graduate Mariam Amin (BBA 2018) was one of 35 CPA Ontario Graduates to receive the 2018 CFE Honour Roll.
- The Schulich Alumni Recognition Awards will take place on March 20<sup>th</sup>. The award recipients include: Michael Rousseau (BBA '81), Deputy Chief Executive Officer & CFO Air Canada - Outstanding Executive Leadership; Roman Dubczak (MBA '87), Managing Director and Head of Global Investment Banking at CIBC - Outstanding Progress and Achievement; and Laura Michalchyshyn (MBA '93), Producer/Owner of Hubbub Productions and Executive Producer Sundance Productions - Outstanding Public Contribution.
- An Experience Schulich event for Schulich Master programs will take place on March 23<sup>rd</sup>.
- Schulich Research Day will take place on March 28<sup>th</sup>.

- The RBC Luncheon with the MBA Games team will take place on April 5<sup>th</sup>.
- The graduate formal will take place on April 18<sup>th</sup>. The undergrad formal will take place on April 25<sup>th</sup>.
- The CONNECT Alumni event will take place April 26-27<sup>th</sup>.

**5. BBA/iBBA Program Committee**

- a) **Motion:** New course proposal for MGMT 4850 3.00 Work Placement

M. Valente moved the motion. Seconded by D. Zwick. M. Valente provided the rationale for the new course as outlined in the motion document. All in favour. Motion carried.

**6. Master Programs Committee**

- a) **Motion:** New Course Proposal for MKTG 6810 3.00 Creativity in Marketing (MMkg)

D. Rice provided an overview of the new course and moved for approval of the motion, with seconding by M. Valente. All in favour. Motion carried.

- b) **Motion:** Minor Change to the Master of Marketing Program (MMkg)

D. Rice outlined the changes to the program and moved for approval of the motion. Seconded by D. Zwick. All in favour. Motion carried.

- c) **Motion:** New Course Proposal for OMIS 6320 1.50 Managing New Supply Chain Technology (MSCM)

On behalf of D. Johnston who could not be in attendance, D. Rice provided a brief overview of the new course and moved for approval of the motion. Seconded by D. Zwick. All in favour. Motion carried.

- d) **Motion:** Minor changes to the Master of Supply Chain Management (MSCM)

On behalf of D. Johnston, D. Rice outlined the small change to the program and moved for approval of the motion. Seconded by D. Zwick. All in favour. Motion carried.

**7. Adjournment**

M. Valente moved for adjournment. Seconded by D. Zwick. All in favour. The meeting adjourned.

**Consent Agenda**

The following items were approved by consent:

**1. BBA/iBBA Program Committee**

a) **Curriculum Changes:**

1. SB/ENTR 4500 3.00 Entrepreneurship & Technology Ventures (*description*)
2. SB/IBUS 4100 3.00 Work Placement (*title & description*)

**2. EMBA Program Committee**

a) **New Course Proposals:**

1. SB/EMBA 6335 2.00 Leading Organizational Transformation
2. SB/EMBA 6755 2.00 Leading and Managing Diverse Organizations

3. **Master Program Committee**
  - a) **Curricular Changes:** SB/ENTR 6400 3.00 Applied Entrepreneurship Field Study (*description & admission process*)
4. **Minutes of the Last Meeting:** 2018.12.14

# Memorandum

## Office of the President

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To: James McKellar, Chair, Faculty Council

From: Rhonda L. Lenton, President and Vice-Chancellor

Date: April 1, 2019

Subject: Schulich School of Business Decanal Search

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I am writing to provide an update to Schulich Faculty Council on the search for the School's next Dean, following up on my comments and those of Provost Lisa Philipps at the Council meeting on March 15.

As members of Council will be aware, the Search Committee has been working throughout the year, with the assistance of search consultants from Perrett Laver, to recruit and consider excellent candidates for the position. To this end, with input from Faculty Council, the Committee developed a position description to present the opportunity clearly and persuasively to potential candidates; and the consultants have been canvassing proactively and widely – both nationally and internationally – on the Committee's behalf. As a result, a number of very strong candidates have been identified, and the Committee has thus far had an opportunity to interview several of those candidates.

At the same time, it has been several months since initial outreach was undertaken to potential candidates, and we are aware that a number of other high profile searches for business school Deans have been under way in Canada and internationally within the same timeframe. Furthermore, it has been the Search Committee's objective throughout the search to recommend to me the appointment of the very best candidate to lead the School forward and to advance its vision and its international reputation; and both the Committee and I wish to be absolutely confident that we have considered the full range of candidates in order to achieve this objective. For these reasons, we have decided to extend the search and to continue to reach out to and consider new candidates in addition to those we already have before us.

Prior to launching the search, the Provost and I received input from members of Schulich Faculty Council on how best to proceed in the event that it was not possible to appoint a new Dean effective July 1, 2019. Based on that input I have asked Dean Horvath to extend his term by one final year ending June 30<sup>th</sup>, 2020. I am pleased to confirm that the Dean is willing to do so pending confirmation by the Board of Governors.



Provost Philipps and I look forward to working with Dean Horvath over the coming year to prepare for the transition to the next Dean – and of course to having opportunities to celebrate his enormous accomplishments and contributions to Schulich and to York over the past 30 years. We also appreciate the willingness of the members of the Search Committee to continue to work towards a successful conclusion to the search, with the intention of announcing the next Dean early in the new year, 2020.

We appreciate the ongoing interest of Faculty Council in this important search. The Search Committee would very much welcome suggestions from members of the Schulich community about potential candidates (from within and beyond academia) who might be approached by the consultants. Suggestions can be sent in confidence to Gordon Lobay [Gordon.Lobay@perrettlaver.com](mailto:Gordon.Lobay@perrettlaver.com) or Caroline McLean [Caroline.McLean@perrettlaver.com](mailto:Caroline.McLean@perrettlaver.com).

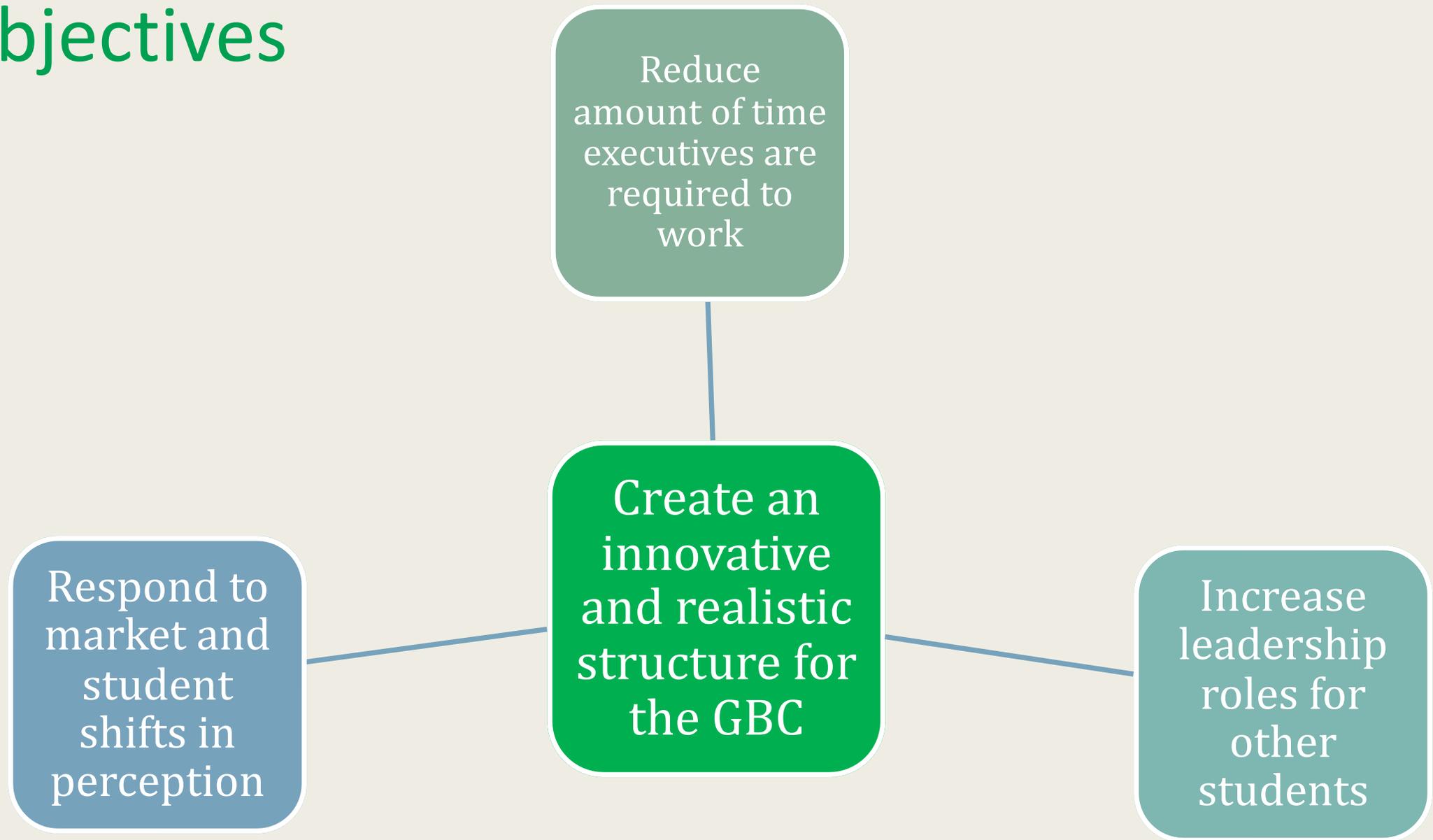
cc: Provost L. Philipps  
E. Rush, Secretary of Council  
Members of the Search Committee

# REDESIGNING THE GBC

A response to a changing environment by trying to  
get ahead of the curve

The sneakiest opponent of a great idea, is not the bad idea, no, it is a good idea. A good day makes you say this floats... what if, we want to soar?

# Objectives



# Rationale

## Customer

- Changing needs
- Identified gaps
- Missed opportunities

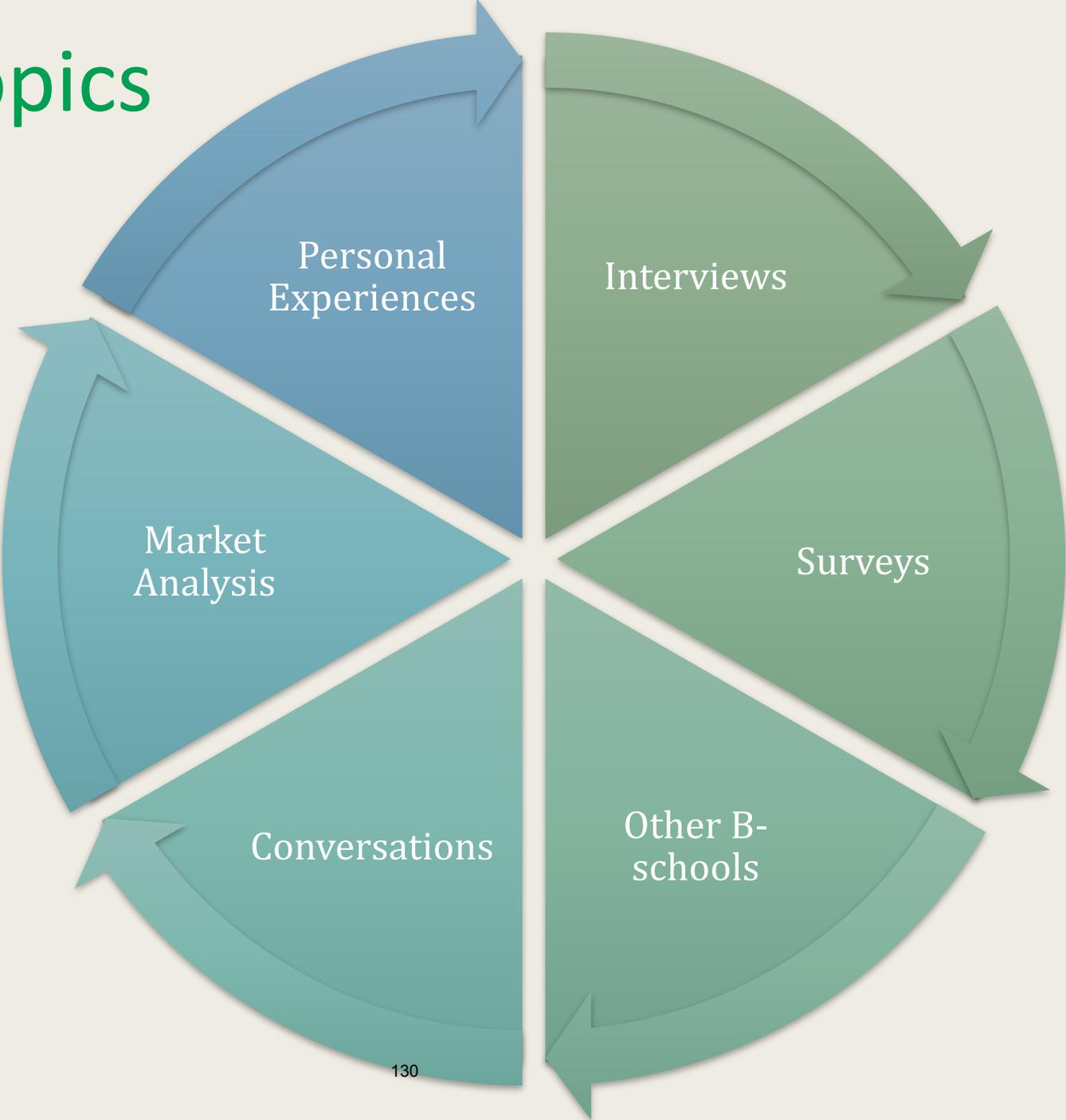
## Market

- Shift in conventions
- Work place changing

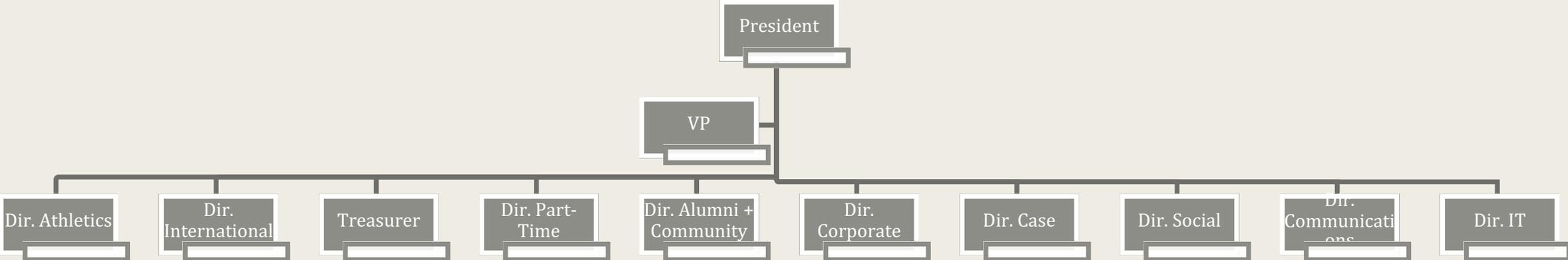
## Operations

- Challenging to read
- Role design bleed

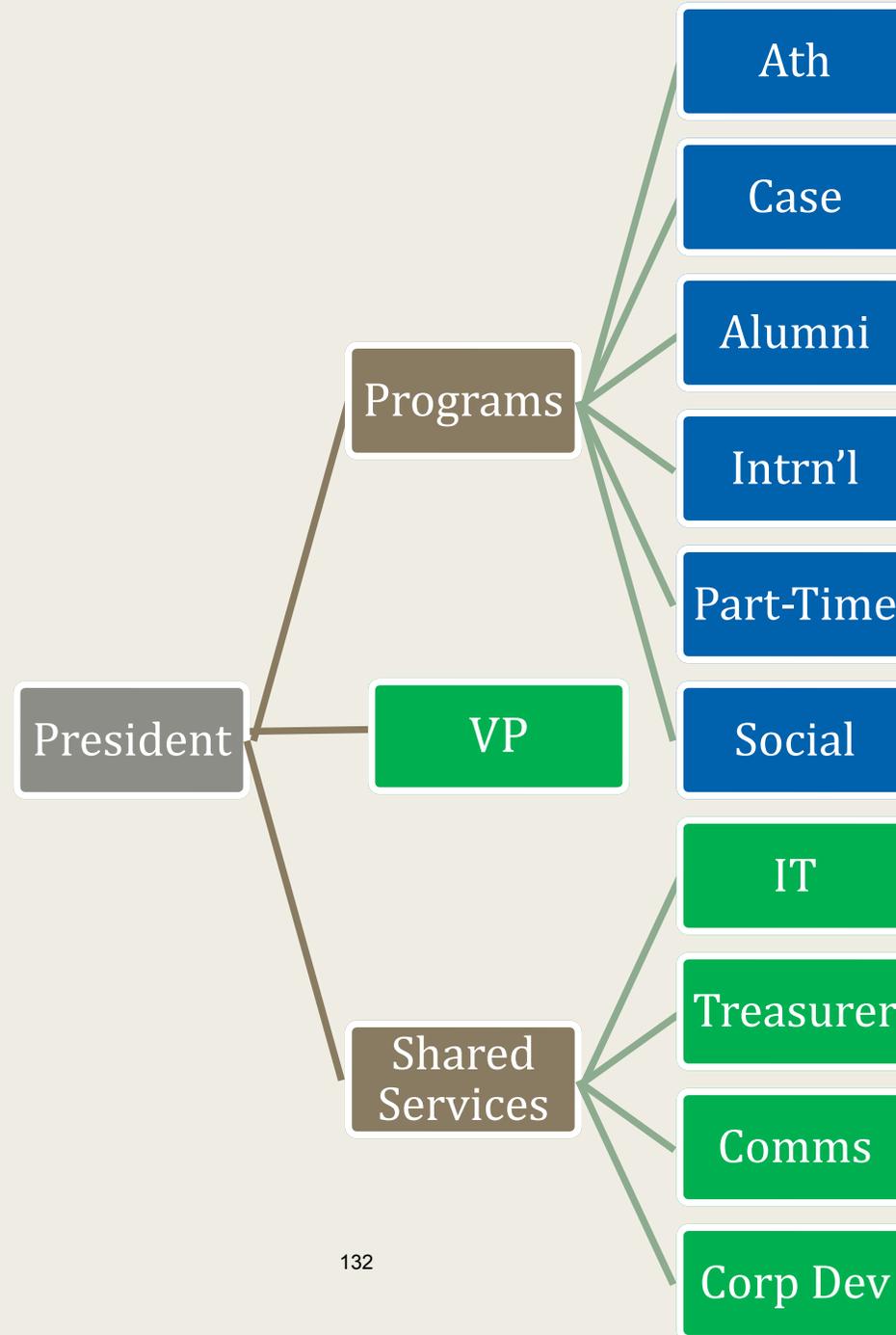
# Research Topics

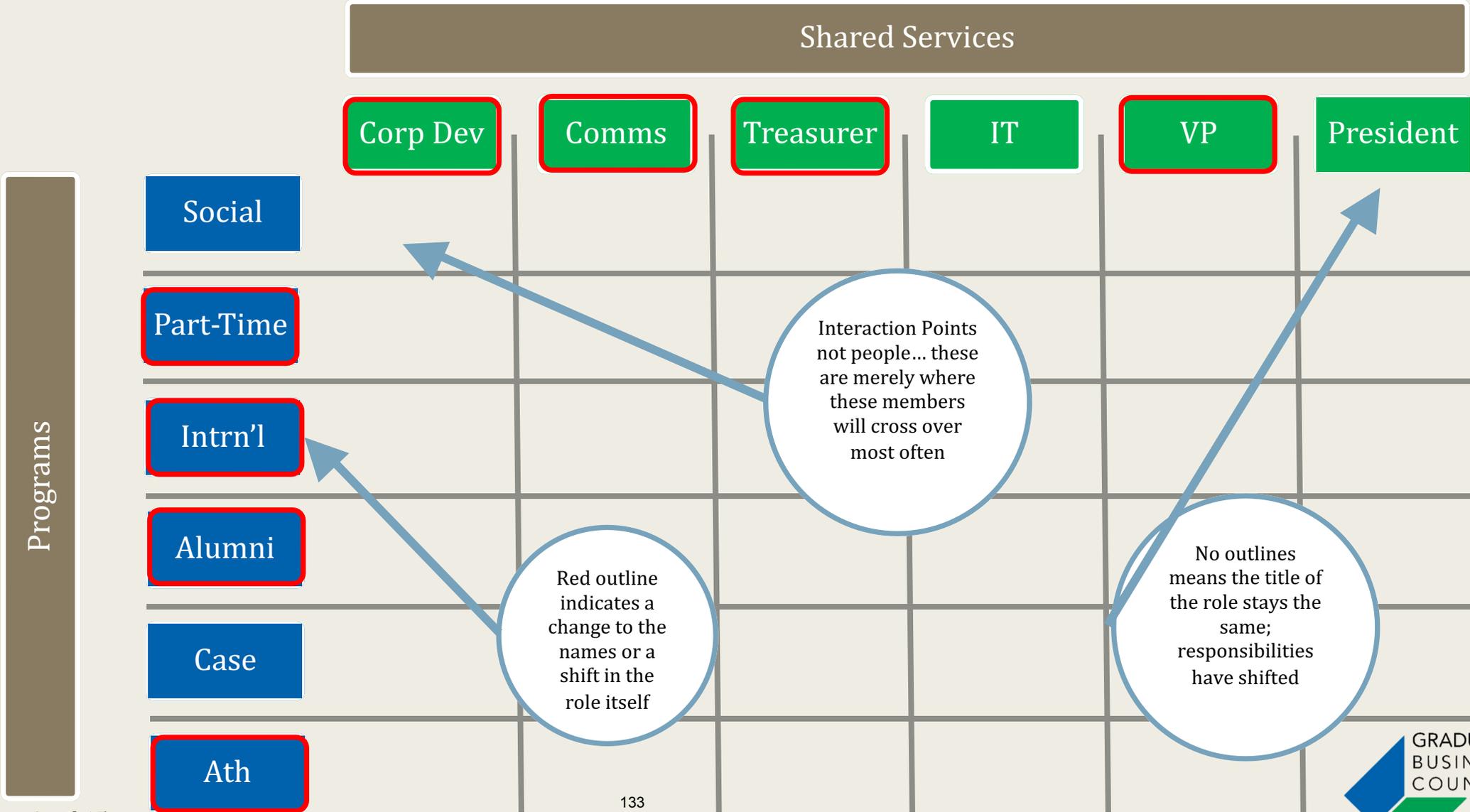


# Current State

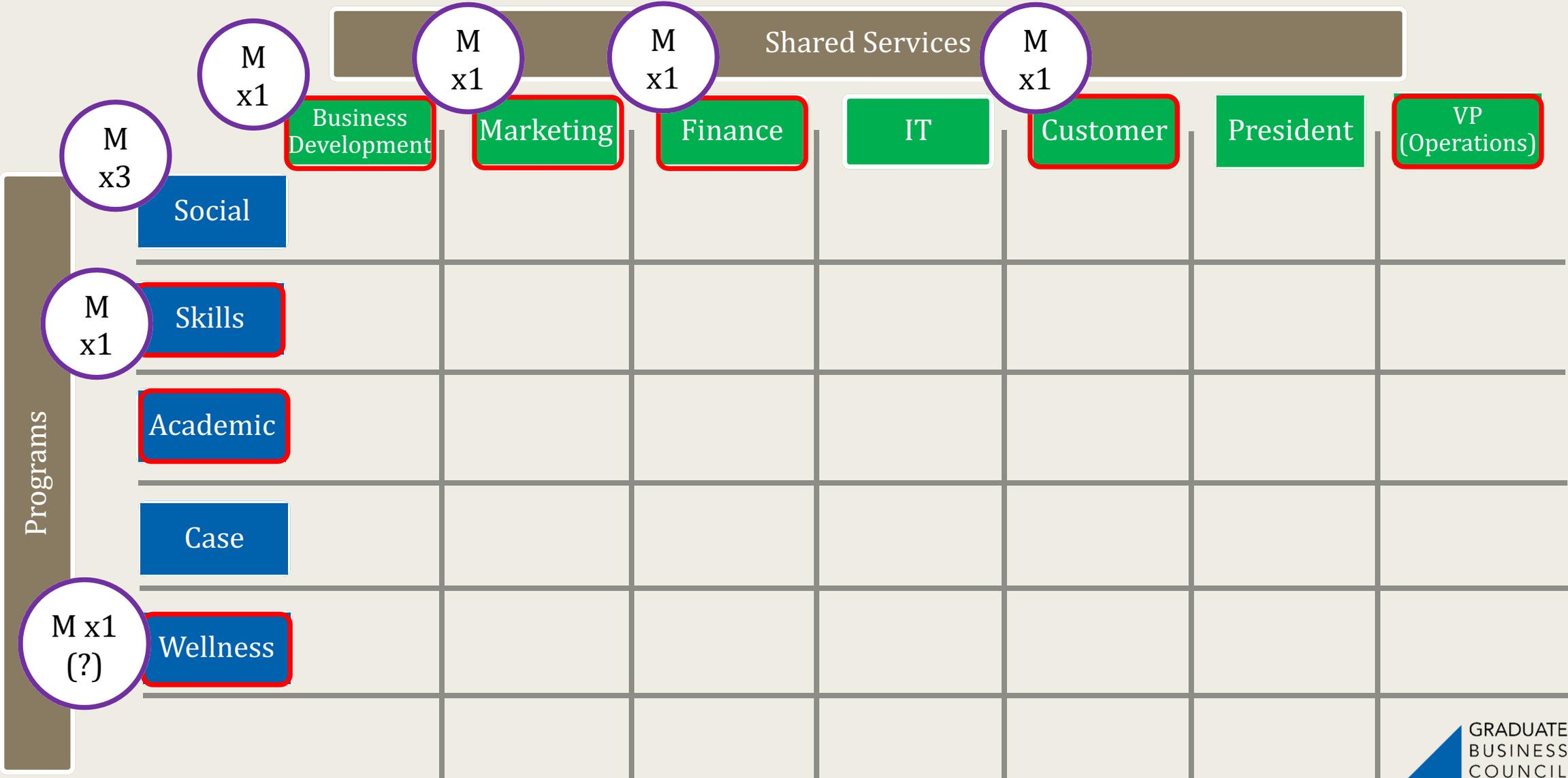


# Actual State





# Proposed New Structure (note Managers)



# VP (Academic) -> VP (Operations)

## Rationale

- VP should support on internal of Council not external Students
- The GBC has a lot of assets and someone should to be responsible
- Operations better suits the second in command at an organization

## Same Responsibilities

- Signing Authority
- Cohort Elections
- Appointing the CRO

## New Responsibilities

- Manages Day-to-Day Operations of the Council
- Main point of contact to the Schulich Operations and Student Services
- Responsible for all physical assets including computers, camera etc.

# Communications -> Marketing Director

## Rationale:

- Change to market applicable name
- No one responsible for Brand and Marketing
- Communications is still apart of the role
- # of communication channels has increased year over year for multiple years

## Same Responsibilities

- Oversee communication channels
- Manage and create communications materials

## New Responsibilities:

- Manage Social Media Manager
- Create, build and manage brand strategy for the GBC
- Help foster and build brand voice and equity
- Ensure consist vision and marketing across channels
- Lead content creation
- Find ways to reach out to all student demographics

# Treasurer -> Finance Director

## Rationale

- Change to market applicable name

## Same Responsibilities:

- All except for one

## New Responsibilities

- Manage Audit Manager

# Corp Dev -> Business Development Director

## Rationale

- Change to market applicable name
- Role is more than relationship management
- Role primarily about ensuring steady flow of sponsorship into the organization

## Same Responsibilities

- All except for 2

## New Responsibilities

- Manage Business Development Manager
- Build out sales funnel for the council

# Part-Time, International, Alumni - Reallocate

## Rationale

- All student needs can be captured through one channel
- To ensure all student needs are met it is required to have in baked into the process thus their should be one person focused on the needs of all students
- Having Directors for certain minority/majority demographic groups can be viewed as problematic and could be discouraging students to be involved

## New Responsibilities:

All major responsibilities are divided up among all new and existing roles

- International Buddy program to expand to New Student Buddy Program to include more students

Same Responsibilities: N/A

# Social Director

## Rationale:

- Role consist with needs of the council and the students

## Same Responsibilities

- All annual social events
- Build events calendar

## New Responsibilities

- Responsible for Culture Crawl
- Manages Yearbook and 2 Event Managers

# Athletics -> Wellness Director

## Rationale

- Change to market applicable name
- Take into account, more being a healthy person

## Same Responsibilities

- MBA Games
- Athletic-oriented events
- Intramural organization/support

## New Responsibilities

- Manage 'Schulax' Mental health initiative
- Plan and execute mind/stress-oriented events

# Create: Customer Insight Director

## Rationale

- All students should have someone to ensure their needs are heard and ideally met
- Someone to track insights from event, workshop and other sources of data

## Same Responsibilities

- N/A

## New Responsibilities

- Understand and communicate to, the needs of all Masters students at Schulich
- Map interactions with students
- Determine insights and share to improve and change events
  - Ensure all calendars are synced to allow most students to come to events
- Maintain “Feedback Form”

# Create: Skills Director

## Rationale

- Biggest improvement area from student survey was skill development
- Students should be able to help decide on the skills they require to be prepared

## Same Responsibilities

- N/A

## New Responsibilities

- Provide/plan professional and personal skill development events
- Manage Clubs Relationship Manager
- Plan Insights Alumni Conference
- Build out skill development annual calendar
- Liaise with Alumni Relations to bring in alumni to assist

# Create: Student Outreach Manager

## Rationale

- There should be a focus on reaching out learning about our students/peers
- Many students feel unheard
- Connection between GBC and all students could be stronger

## Same Responsibilities

- N/A

## New Responsibilities

- Co-manages the new “Buddy Program”
  - Maintain processes that connect incoming students with current students
- Plans welcome gift for the incoming students
- Helps plan Launch week
- Runs initiatives, surveys, town halls, focus groups to connect with students and understand their needs

# Create: Student Outreach Manager, International

## Rationale

- There should be a focus on reaching out learning about our students/peers
- Many students feel unheard
- Connection between GBC and all students could be stronger

## Same Responsibilities

- N/A

## New Responsibilities

- Co-manages the new “Buddy Program”
  - Maintain processes that connect with international students
- Liaises with International Student Services and Social Director for Events
- Runs initiatives, surveys, town halls, focus groups to connect with students and understand their needs

# Create: Clubs Relationship Manager

## Rationale

- Relationships with Clubs requires a lot of time and attention
- Relationship with the Clubs is important for the GBC
- Clubs represent over 60% of student body

## Same Responsibilities

- N/A

## New Responsibilities

- Runs Bi-Annual clubs Summit
- Manages relationship with all Club Presidents
- Monitors and supports clubs with their mandates
- Assists in administering Club Granting

# Create: Social Media Manager

## Rationale

- Most likely to interact with students over Social Media
- Number of channels increasing yearly

## Same Responsibilities

N/A

## New Responsibilities

- Manage website content
- Build, test and manage posts on all social media channels including the website
- Maintain active social media presence
- Assist and lead ideation of new content and campaigns

# Create: Audit Manager

## Rationale:

- Audit one of the most important functions of the GBC
- Tracking expenses and forecasting all activities is a significant amount of work for one person

## Same Responsibilities

N/A

## New Responsibilities

- Manage relationship with Audit firm
- Ensure Audit is completed in a timely
- Collate and track all expenses on a monthly basis

# Create: Business Development Manager

## Rationale

- Business Development is important to council functionally sustainably
- Increasing number of people will increase funnel and outreach to prospective sponsors

## Same Responsibilities

- N/A

## New Responsibilities

- Assist in build strategy to outreach for prospective sponsors
- Lead impact reporting for sponsors and re-engagement process

# Create: Event Managers (2)

## Rationale

- Events require a significant amount of planning and execution energy
- Adding a major event should increase the capacity
- Schulympics, Gala and Culture Crawl can be planned over the summer

## Same Responsibilities

- N/A

## New Responsibilities

- Assist in Event planning and execution
- Lead certain not all events
- Build in customer insights to the events to ensure maximum impact

# Create: Year Book Manager

## Rationale

- The Yearbook is an important keepsake for students and the alumni relations
- Direct correlation between time and quality for this project

## Same Responsibilities

- N/A

## New Responsibilities

- Manage planning, curation, collection and assembly of the Year book