



**Gustavson**  
School of Business  
University of Victoria



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# Course Outlines Spring Term

**NOTE:** Course outlines are for reference only.  
Availability and course offerings are subject to change every year.

Gustavson School of Business (GSB)  
University of Victoria

Contact: [GSBWelcome@uvic.ca](mailto:GSBWelcome@uvic.ca)



Please follow the hyperlink on "Course Numbers" to navigate within the document. Please click on the corresponding "Course Title" for more information on prerequisites.

**Pre-Requisites:** Courses with asterisks (\*) have pre-requisites. Please look at individual course outlines and carefully review them to see if you meet the criteria.

**Core courses:** Students are required to take at least 3 core courses due to the cohort-based structure if students were to take Com 316, 322, 331, 362, or 371. Afternoon cohorts are recommended.

Course Numbers	Course Title
<a href="#">Com 100</a>	<a href="#">Understanding World-Class Organizations</a> (Credit only granted for one of 100, 290, 390)
<a href="#">Com 200</a>	<a href="#">Strategy and Business Fundamentals</a>
<a href="#">Com 202</a>	<a href="#">Financial Accounting I</a> (Duplicate course with Com 315)
<a href="#">Com 220</a>	<a href="#">Organizational Behaviour</a> (Duplicate course with Com 321)
<a href="#">Com 240*</a>	<a href="#">Management Finance</a> (Duplicate course with Com 371)
<a href="#">Com 247</a>	<a href="#">Personal Financial Management</a>
<a href="#">Com 250</a>	<a href="#">Fundamentals of Marketing</a> (Duplicate course with Com 351)
<a href="#">Com 290</a>	<a href="#">Introduction to Canadian Business</a> (Credit will be granted for only one of 290, 100, 390)
<a href="#">Com 302</a>	<a href="#">Legal Environment of Business</a> (Credit can only be granted for one of COM 402, 302)
<a href="#">Com 303</a>	<a href="#">Intermediate Business Topics</a> : Topics To Be Announced
<a href="#">Com 316</a>	<a href="#">Management Accounting I</a> (Duplicate course with Com 317)
<a href="#">Com 317*</a>	<a href="#">Management Accounting II</a> (Duplicate course with Com 316)
<a href="#">Com 322</a>	<a href="#">Leading People and Organizations II</a>
<a href="#">Com 331</a>	<a href="#">Introduction to Management Information Systems</a>
<a href="#">Com 362</a>	<a href="#">Business and Sustainability</a>
<a href="#">Com 371</a>	<a href="#">Management Finance</a> (Duplicate course with Com 240)
<a href="#">Com 400</a>	<a href="#">Strategic Management</a>
<a href="#">Com 402*</a>	<a href="#">Legal Issues in Management</a> (Credit can only be granted for one of COM 402, 302)
<a href="#">Ent 100</a>	<a href="#">Introduction to Entrepreneurship and Innovation</a>
<a href="#">Ent 402*</a>	<a href="#">Entrepreneurship &amp; Small Business for the Non-Specialist</a>
<a href="#">IB 301</a>	<a href="#">International Environment of Business</a> (Duplicate course with Com 361)

Service Management Specialization**	<p>Please note that all four of the following courses must be taken together to complete the Service Management Specialization: SMGT 415, SMGT 416, SMGT 417, and Com 400 concurrently.</p> <p><b>NOTE:</b> SMGT 415, SMGT 416, SMGT 417 <u>CANNOT</u> be taken on their own. COM 400 is the only course that can be taken as an individual stand-alone course. SMGT 415, SMGT 416, SMGT 417 require pre-requisites.</p>
<a href="#">SMGT 415**</a>	<a href="#">Customer Experience Management</a>
<a href="#">SMGT 416**</a>	<a href="#">Service Operations &amp; Quality Management</a>
<a href="#">SMGT 417**</a>	<a href="#">Service Human Resource Management</a>
<a href="#">COM 400</a>	<a href="#">Strategic Management</a>



## COM10001

### Understanding World-Class Organizations Spring 2024 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	Monday/Thursday 10am-1120am
Location	<p>Online zoom link (below)</p> <p>Weekly: <a href="https://uvic.zoom.us/j/86450967775?pwd=VHNkL0tIKzN3Tzg3WVoyTWdyZWZlI7ZMI9vX">https://uvic.zoom.us/j/86450967775?pwd=VHNkL0tIKzN3Tzg3WVoyTWdyZWZlI7ZMI9vX</a></p> <p>Join Zoom Meeting <a href="https://uvic.zoom.us/j/86450967775?pwd=VHNkL0tIKzN3Tzg3WVoyTWdyZWZlI7ZMI9vX">https://uvic.zoom.us/j/86450967775?pwd=VHNkL0tIKzN3Tzg3WVoyTWdyZWZlI7ZMI9vX</a></p> <p>MeetingID: 864 5096 7775 Password: 774369 One tap mobile +17789072071,,86450967775#,,,0#,,774369# Canada +16475580588,,86450967775#,,,0#,,774369# Canada</p> <p>Dial by your location +1 778 907 2071 Canada +1 647 558 0588 Canada MeetingID: 864 5096 7775 Password: 774369 Find your local number: <a href="https://uvic.zoom.us/j/86450967775?pwd=VHNkL0tIKzN3Tzg3WVoyTWdyZWZlI7ZMI9vX">https://uvic.zoom.us/j/86450967775?pwd=VHNkL0tIKzN3Tzg3WVoyTWdyZWZlI7ZMI9vX</a></p>
Instructor:	Mark Colgate
Office hours:	<p><i>1-2pm Thursdays on zoom. Details below.</i></p> <p><i>Join Zoom Meeting (different to class link)</i> <a href="https://uvic.zoom.us/j/5923297313">https://uvic.zoom.us/j/5923297313</a></p>
Email:	colgate@uvic.ca

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A supportive and safe learning and working environment for all its members.***

## **Introduction:**

Mark Colgate is a professor in service excellence and coaching at the Gustavson School of Business, University of Victoria. In the not-too-distant past Mark spent 3 years as the General Manager of Customer Satisfaction at Commonwealth Bank of Australia, the 10<sup>th</sup> largest bank in the world. Mark's background is in marketing, customer experience management and coaching and he has taught these topics in New Zealand, Australia, Canada, Ireland and China where he was a regular professor at the China European Business School in Shanghai - the leading business school in China.

His scholarly publications can be found in journals such as *Sloan Management Review*, *Journal of the Academy of Marketing Science*, and *the Journal of Service Research*. He has also consulted for many companies such as TELUS, WEX, City of Richmond, Vancouver Whitecaps, Whistler Blackcomb, Kiwi Experience Tourism Bus Company, BC Government, and Toyota Financial Services. He also likes tasty cheese and running (to lessen the impact of the cheese).

## **Texts and Resources:**

In the past we have used textbooks, but over time recognized the value in creating a set of readings that provide both frameworks for guiding your thinking and managerially focused processes for understanding business. The link to the readings are posted on Brightspace. However, there is a very good ebook *Introduction to Business*, by Gitman, Lawrence J et al. (2018) is posted online for your use.

## **Course Objectives and Description:**

Designed to ensure students learn all of the components of expertly run organizations. Topics covered include understanding the organizational context, strategy, leadership, accounting and finance, employee motivation, operations, customer and market focus and what effective results look like. Case studies of organizations are used to bring the course to life.

## **Course Format:**

A blend of zoom classes, polling, guest speakers, amusing cats, mini case studies, and break-out group exercises will be employed.

## Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

## Evaluation Elements:

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type (Exam, Assignment, Quiz, Other)	Due Date	Weight / % of grade	Description
COM 100: Term Assignment	Individual	AI Assignment	April 8th	12%	Individual Assignment
COM 100: Term Assignment	Individual	Research Assignment – Draft for feedback	Feb 4 <sup>th</sup>	0%	Individual Assignment
COM 100: Term Assignment	Individual	Research Assignment – Final version	Feb 29 <sup>th</sup>	18%	Individual Assignment
COM 100 Midterm #1	Individual	Test	Feb 15 <sup>th</sup>	13%	Midterm 1 - Quiz (multiple guess)
COM 100: Midterm #2	Individual	Test	March 21 <sup>st</sup>	12%	Midterm 2 – Accounting test
COM 100: Polling	Individual	Polling	(Ongoing dates throughout semester)	12%	Participation – participation Through zoom polling – <i>1.5% when you got <b>2 or more</b> questions correct out of 4 questions (best 8 from 10)</i>
COM 100: Final exam	Individual	Exam	Mid-April	33%	Final Examination in April – 3 essay questions
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

## **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

## **Course Assessment:**

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of **2%** for each day an assignment is late.

### **Use of Artificial Intelligence (AI):**

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT is allowed in this course for students who wish to use them. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI. ***Assignment guidelines will provide additional guidance as to how these tools might be part of your process for each assessment this semester and how to provide transparency about their use in your work.***

## **Attendance and Participation:**

Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. Attendance is a critical component of everyone's academic success.

Missed Coursework or Assessments: Students have the responsibility to **proactively** seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

## **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that "A" grades are normally achieved by a minority of students.**

Percentage Range	Grade s	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Note that it is required that you pass **the final exam** to pass the course. In the case that you do not attain a passing grade in any such component, it will result in a final course grade of Incomplete (N), with the maximum possible percentage grade of 49.

Final course grades are official only after they have been approved by the Academic Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

## **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### **Schedule Summary:**

TOPIC	Type (Zoomclass, test etc.	Date	Description
COM 100: <b>Welcome!</b>	Zoom	Monday 8 <sup>th</sup> Jan	<b>Introduction:</b> Integrated Business Framework and Entrepreneurship
COM 100: <b>Entrepreneurship</b>	Zoom Poll #1	Thursday 11 <sup>th</sup> Jan	<b>Entrepreneurship</b> - Reading: Beating the Odds When You Launch a New Venture
COM 100: <b>Entrepreneurship</b>	<b>Guest Speaker</b>	Monday 15 <sup>th</sup> Jan	Jeff Mallett on entrepreneurship
COM 100: <b>External Environment</b>	Zoom Poll #2	Thursday 18 <sup>th</sup> Jan	<b>External Environment:</b> The Five Forces  <b>Reading:</b> The Five Competitive Forces That Shape Strategy - Michael E. Porter, Harvard Business Review



COM 100: <b>Leadership</b>	Zoom Poll <b>#3</b>	Monday 22 <sup>nd</sup> Jan	<b>Leadership:</b> Level 5 leaders Watch the Founder movie
COM 100: <b>Leadership</b>	Zoom Poll <b>#4</b>	Thursday 25 <sup>th</sup> Jan	<b>Leadership:</b> Level 5 leaders  <b>Reading:</b> What Makes a Leader? Daniel Goleman, Harvard Business Review
COM 100: <b>Leadership</b>	Zoom Poll <b>#5</b>	Monday 29 <sup>th</sup> Jan	<b>Strategy:</b> Diagnosis, Choice, Execution  <b>Reading:</b> Good Versus Bad Strategy
COM 100	Zoom Poll <b>#6</b>	Thursday 1 <sup>st</sup> Feb	<b>Strategy:</b> Diagnosis, Choice, Execution  Can You Say What Your Strategy Is? David J. Collis, Michael G. Rukstad, Harvard Business Review
COM 100: <b>Strategy</b>	Guest Speaker	Monday 5 <sup>th</sup> Feb	<b>Guest speaker – Hannes Blum</b>
COM 100	Zoom	Thursday 8 <sup>th</sup> Feb	AI and Business
COM 100: <b>Strategy</b>	Zoom	Monday 12 <sup>th</sup> Feb	<b>Customer and Market Focus:</b> Creating Value <i>with</i> Customers <b>Reading:</b> Marketing Malpractice
COM 100: <b>Marketing</b>	<b>Mid Term 1</b>	Thursday 15 <sup>th</sup> Feb	TEST IN CLASS TIME!
COM 100: <b>Marketing</b>	Zoom Poll <b>#6</b>	Monday 26 <sup>th</sup> Feb	<b>Customer and Market Focus:</b> Creating Value <i>with</i> Customers <b>Reading:</b> Ultimate Marketing Machine
COM 100: <b>Guest Speaker</b>	Zoom poll <b>#7</b>	Thursday 29 <sup>th</sup> Feb	<b>Customer and Market Focus:</b> Creating Value <i>with</i> Customers <b>Case:</b> Kiwi Experience
COM 100: <b>Marketing</b>	Guest Speaker	Monday 4 <sup>th</sup> March	<b>Guest Speaker #3</b>
COM 100: <b>Marketing</b>	Zoom poll <b>#8</b>	Thursday 7 <sup>th</sup> March	<b>Measurement, Analysis and Knowledge Management:</b> Accounting <b>Resources:</b> All materials on Brightspace
COM 100: <b>Accounting</b>	Zoom	Monday 11 <sup>th</sup> March	<b>Measurement, Analysis and Knowledge Management:</b> Accounting <b>Resources:</b> All materials on Brightspace
COM 100: Read for class	Zoom	Thursday 14 <sup>th</sup> March	<b>Measurement, Analysis and Knowledge Management:</b> Accounting  <b>Resources:</b> All materials on Brightspace

COM 100: Read for class	<b>Zoom</b>	Monday 18 <sup>th</sup> March	<b>Optional accounting tutorial</b>
COM 100: Accounting	Test	Thursday 21 <sup>st</sup> March	<b>Midterm 2- accounting test</b>
COM 100: Read for class	Zoom	Monday 25 <sup>th</sup> March	<b>Human Resource Focus:</b> Motivating Your People <b>Reading:</b> Daniel Pink Video– MAP
COM 100: Read for class	Zoom Poll <b>#9</b>	Thursday 28 <sup>th</sup> March	<b>Human Resource Focus:</b> Motivating Your People <b>Reading:</b> Google Best Teams
COM 100: Read for class	No class	Monday 1 <sup>st</sup> April	<b>Easter Monday No class</b>
COM 100: Read for class	Zoom Poll <b>#10</b>	Thursday 4 <sup>th</sup> April	<b>Process Management:</b> Increasing Productivity and Quality
COM 100: Read for class	Zoom	Monday 8 <sup>th</sup> April	<b>Process Management:</b> Increasing Productivity and Quality <b>Final exam prep</b>

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



## COM 200 (A01, A02, A03, A04, A05, A06)

### Strategy and Business Fundamentals

#### Fall 2023 Course Outline

Note: please check Brightspace frequently for new updates and course changes.

Course hours	Tuesday, Wednesday, and Friday 🚦 Section A01: 8:30-9:20 🚦 Section A02: 9:30-10:20 🚦 Section A03: 10:30-11:20 🚦 Section A04: 12:30-1:20 🚦 Section A05: 1:30-2:20 🚦 Section A06: 2:30-3:20		
Location	🚦 Section A01: ELL 061 🚦 Section A02: ELL 162 🚦 Section A03: ELL 060 🚦 Section A04: COR B111 🚦 Section A05: COR B111 🚦 Section A06: COR B111		
Instructor:	<b>Brian Leacock</b>	<b>Tricia Thomas</b>	<b>Wade Danis</b>
Office:	BEC 272		BEC 230
Office hours:	<i>T: 15:30-16:30 or by appointment</i>	<i>T: 15:30-16:30 or by appointment</i>	<i>T: 15:30-16:30 or by appointment</i>
Telephone:	(250) 721-6434	(250) 709-2929	(250) 853-3872
Email:	bleacock@uvic.ca	triciathomas@uvic.ca	wdanis@uvic.ca

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community. Please let us know if we can do better to support your rights in our classroom. We will also do our best to listen and respond compassionately if you want to share with us how we can be a better ally.

### **Introduction:**

This course is a team-taught course delivered by three instructors: Brian Leacock, Tricia Thomas, and Wade Danis. Your instructors' professional profiles may be found on the Gustavson School of Business website: <https://www.uvic.ca/gustavson/faculty/faculty/faculty/index.php>

### **Texts and Resources:**

In an effort to minimize course material costs there is no textbook for this course. Where possible we have placed these directly to Brightspace but you will also be required to source some readings on your own through the library (<http://www.uvic.ca/library/>).

### **Course Objectives and Description:**

Organizations are complex social systems, embedded in local and global contexts that shape and influence the strategy of the firm and the people performing different tasks in pursuit of broader organizational goals. This course introduces students to key concepts involved in the design and management of organizations and the behaviour of individuals and groups within them. The main objectives of this course are to:

- Understand oneself and how to maximize one's strengths to navigate a career
- Develop a greater understanding of your leadership style and further build your leadership potential
- Analyze the issues and dynamics underlying individual and team behaviour in organizations
- Understanding the Indigenous context and business reconciliation in Canada
- Examine the ideas, issues, complexities and ambiguities relevant to the design, development and management of organizations
- Identify the key organizational variables, the relationships among them, and their influence on structure, strategy and effectiveness
- Explore the functioning of various processes and systems inherent in organizations

After completing the course students should be in a position to clearly understand, analyze and critique the environment, goals, strategy and structure of organizations, and the processes within them. The pedagogy will involve lectures, discussions, cases, exercises, presentations, and videos.

### **Course Format:**

We aim to create a seamless delivery but please note that each instructor will have a slightly different style and the course is delivered in three distinct segments. Professor Leacock will focus on Self; Professor Thomas will focus the Business Context, and Professor Danis will focus on Organizational Strategy.

Regardless of the instructor, you are expected to read the material before class and come prepared to engage in a discussion of the material.

### **Educational Technology**

We use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University.

Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which store or access your personal information outside Canada, are required for this course: Zoom, MS Teams, Youtube, HBR, Mentimeter, ChatGPT. We will make you aware if this list changes. We use these technologies to enhance your educational experience at UVic. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at [Zoom](#), [MS Teams](#), [Youtube](#), [HBR](#), [Mentimeter](#), and [ChatGPT](#). We encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to us within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

### **Evaluation Elements:**

Students will be evaluated according to the following schedule:

Title	Individual or Team	Type	Due Date	Weight / % of grade	Description
Leacock: Reflected Best Self Journal	Individual	Hand-in Assignment	Oct 3, 2023 by end of class	28.3%	Described in class
Thomas: Management Research Analysis	Individual & Group	Hand-in Assignment	Nov 1, 2023 11:59 PM	28.3%	Described in class
Danis: Written case analysis	Individual	Hand-in Assignment	Dec 1, 2023 submit prior to class via Brightspace	28.3%	Report providing analysis, diagnosis and recommendations for a business case, including application of pertinent course concepts/ frameworks
Positive Participation				15%	Assessed via online polling (ongoing dates throughout semester).
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that the instructor may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class.

The survey is vital to providing feedback to the instructors regarding the course and their teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

## **Course Assessment:**

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty."

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of 10% for each day an assignment is late.

### **Use of Artificial Intelligence (AI):**

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, is permitted in this course for students who wish to use them. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI.

## **Attendance:**

Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

**Missed Coursework or Assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner.

## **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

## **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### **Schedule Summary:**

Readings and class preparation instructions available on Brightspace. Please check often for updated information.

Title	Instructor	Date	Description
Introductions – No preparation required	ALL	Sep 6	Review class outline and expectations
Self: Perception, Personality, and Emotions	Leacock (1)	Sep 8	Our behaviour is shaped by our perceptions, personalities, emotions, and experiences. In this section, we consider the role that perception plays in affecting the way we see the world and the people around us. We also consider how personality characteristics affect our attitudes toward people and situations. We then consider how emotions shape many of our work-related behaviours. Focus: Perception [UB1]



	Leacock (2)	Sep 12	Focus: Unconscious Bias / Emotional Intelligence [UB 2]
	Leacock (3)	Sep 13	Focus: Emotional Intelligence / Resilience / Wellness [EQ1]
Self: Values, Attitudes, and Diversity	Leacock (4)	Sep 15	In this section, we look carefully at how values influence behaviour and consider the relationship between values and attitudes. We also examine two significant issues that arise from our discussion of values and attitudes: how to enhance your job satisfaction and manage workforce diversity. Focus: Cultural Intelligence [CQ1]
	Leacock (5)	Sep 19	Focus: Diversity [CQ2]
Self: Communicating	Leacock (6)	Sep 20	Positive Communication for Inclusion. The goal of this section is to improve students' effectiveness as leaders, managers, and team members by introducing frameworks for understanding how positive communicative behaviors in the workplace as a means for building exceptional performance. Focus: Communicating for Inclusion [CX1]
	Leacock (7)	Sep 22	Focus: Communicating for Inclusion [CX2]
Self: Identifying your leadership frame	Leacock (8)	Sep 26	In this section, we explore leadership to determine four frames you can use to be an effective leader. Focus: Reframing 🚩 Leading with a structural frame
	Leacock (9)	Sep 27	🚩 Leading with a HR frame
	Leacock (10)	Sep 29	🚩 Leading with a symbolic frame
	Leacock (11)	Oct 3	🚩 Leading with a political frame
Introduction	Thomas (1)	Oct 4	Review Module 2: outline and expectations
Managing the Broader Context	Thomas (2)	Oct 6	Discussion of management, organization, and some useful key terms.
Planning with Purpose	Thomas (3)	Oct 10	Exploration of planning and goal setting in a fast changing world.
Team-Based Problem Analysis	Thomas (4)	Oct 11	Analyzing a problem and leveraging the group to improve analysis.
Presentations	Thomas (5)	Oct 13	Students will spend this class introducing their group to a management practice they have researched through the UVic library. They will begin to create an experiential learning activity for the class.
Organization and Diversity	Thomas (6)	Oct 17	Exploring forms of organization that are resilient, nimble, and welcoming.

Cultures of Leadership	Thomas (7)	Oct 18	Discussing classic and contemporary models of leadership.
Cultures of Leadership	Thomas (8)	Oct 20	Continued discussion of classic and contemporary models of leadership.
Leadership beyond the Organization	Thomas (9)	Oct 24	An expanded angle on what management and organization can mean within a broader social context
Relationship Economies and Indigenomics	Thomas (10)	Oct 25	Introduction to Indigenous context and doing business in Canada.
Evidence-Based Decision Making	Thomas (11)	Oct 27	Discussing the biases that can work their way into planning and measuring.
Evidence-Based Decision Making	Thomas (12)	Oct 31	Continued discussion of the biases that can work their way into planning and measuring.
The strategic management process	Danis (1)	Nov 1	Five tasks of strategic management Value creation and competitive advantage
The case methodology	Danis (2)	Nov 3	In-class case analysis and discussion
Establishing company direction - 1	Danis (3)	Nov 7	Strategic intent: Vision, mission, objectives
Establishing company direction - 2	Danis (4)	Nov 8	Strategy formulation Factors that shape strategy
Evaluating the external environment - 1	Danis (5)	Nov 10	External environmental analysis (e.g., scanning, monitoring, forecasting, assessing; segments of the general environment)
	NA	Nov 13, 14, 15	READING BREAK – NO CLASSES
Evaluating the external environment – 2	Danis (6)	Nov 17	Industry and competitor analysis (e.g., industry structure, competitive positioning, strategic rivalry)
Evaluating the internal organization - 1	Danis (7)	Nov 21	Value creation, resources, capabilities, core competencies (outsourcing)
Evaluating the internal organization - 2	Danis (8)	Nov 22	SWOT (i.e., integrated external and internal analysis)
Creating competitive advantage -1	Danis (9)	Nov 24	Generic strategies Business and corporate level strategies
Creating competitive advantage 2	Danis (10)	Nov 28	Cooperative and international strategies  Q&A related to written case analysis assignment.
Written case analysis review			
Strategy implementation 1	Danis (11)	Nov 29	Discussion of written case 1: Identification of key issues  CES administration

Strategy implementation 2	Danis (12)	Dec 1	Discussion of written case 2: Analysis, recommendations, and implementation.

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



## COM 202 (A01)

### Financial Accounting I Spring 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	<i>Monday &amp; Thursday: 4:00-5:20pm</i>
Location	David Strong Building C118
Instructor:	Dr. Qianqian Du
Office:	Business and Economics Building, 212
Office hours:	<i>Regular hours: Wednesdays 1-3pm. In-person or Zoom meetings outside regular hours are possible. All meetings are by e-mail appointments only.</i>
Email:	qianqiandu@uvic.ca

***We acknowledge and respect the lək'wəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.***

### **Introduction:**

I am an Associate Professor of Finance at the Gustavson School of Business, University of Victoria. I received my B.A. in Economics from Shandong University in China, my M.Sc. in Economics from the University of Oxford in UK, and my Ph.D. in Business Administration from the University of British Columbia. My research areas include private equity, financial analysts, and corporate governance. I have taught courses in entrepreneurship, finance, and accounting in UBC, Shanghai Advanced Institute of Finance-Shanghai Jiao Tong University, and the Hong Kong Polytechnic University.

Our financial accounting course aims to provide some basic concepts and their applications to solve real accounting problems. Accounting is a powerful tool for us to evaluate the financial health of a corporation, an organization, and even our own accounts! The best way of learning accounting is to practice accounting so lots of practice is expected in our course!

Welcome to this course and have fun!

### **Texts and Resources:**

Kimmel, Weygandt, Kieso, Trenholm, Irvine, Burnley, 2020, "Financial Accounting, Tools for Business Decision-Making", Eighth Canadian Edition with WileyPLUS, ISBN: 978-1-119-61460-9.

Calculator: A basic function calculator is required for COM 202.

## **Course Objectives and Description:**

This is an introductory course in financial accounting. The ultimate goal is to understand the three financial statements: income statements, balance sheets, and cash flow statements, which are mandatory filings for publicly listed companies and also the basis for investors to make decisions. To achieve this goal, we start with preparing accounts for business activities. We then use these accounts and all relevant information to prepare the three statements and understand how these three statements are connected. Specifically, we cover the following topics:

1. Introduction of business activities, accounting framework, and the three statements.
2. Accounting process.
3. Accruals, cash, and receivables.
4. A closer look at total assets, liabilities, and equity.
5. Cashflow statements and the connection of the three statements.

## **Course Format:**

For each topic, we have both lectures and discussions of accounting questions to better understand the underlying accounting principles. For the lecture part, we introduce accounting theories and the economic intuition behind them. For the questions part, we work on the assigned questions. All book chapters and assigned questions are included in the tentative class schedule. We plan to have lectures on Monday and discussions of questions on Thursday. If some topics are more complex than others, we will allocate more time towards lectures.

Before the Monday class, you are encouraged to read the assigned book chapters indicated in the class schedule. During the class, I expect active participation from you. For the assigned questions to be discussed in the Thursday class, please try your best to work on them before coming to class. We will try to go through most of the questions assigned to the Thursday class.

To reinforce what we have learned from the classes, there will be five mandatory problem sets to be completed by each student. The problem sets include questions based on multiple classes and are more difficult than the assigned questions on Thursday. The due dates of the problem sets are included in the class schedule and all problem sets should be submitted to BrightSpace. All submitted problem sets will be graded and returned to you. The problem sets ensure that you have a smooth learning path and receive timely feedback on your progress.

## **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

## **Educational Technology**

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: ZOOM. I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at <https://explore.zoom.us/en/privacy/>. I encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

## **Evaluation Elements and Course Assessment:**

### **Problem Sets (15%)**

There will be five mandatory problem sets and each covers multiple topics in this class. Each problem set counts 3% of your final grade. All problem sets should be submitted to BrightSpace and graded problem sets will be returned to you with feedback. Please refer to the class schedule for due dates of these problem sets.

### **Midterm Exam(25%)**

In-class midterm exam is scheduled on **February 16**. It is a closed book exam and covers all course materials before midterm. Non-programable calculator can be used during the exam. Cell phones or pre-programmed calculators are not allowed.

### **Attendance and Participation (10%):**

Regular attendance is an expectation for Commerce classes. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Students with unexcused absences\* from ***more than 20% of class sessions*** will ***receive a grade of zero in class participation***.

\*unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site.

### **Final Exam(50%):**

The final exam will be 3 hours, covering all materials used in this course. It is a closed book exam and non-programable calculator can be used during the exam. Cell phones or pre-programmed calculators are not allowed. The schedule will be announced later in the Registrar's examination period.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of **5%** for each day an assignment is late.

Students will be evaluated according to the following schedule:

Title	Type	Due Dates	%of Grade
Problem Sets x 5	Online submission to BrightSpace	Class Schedule	15%
Midterm Exam	In class, close-book exam	<b>February 16</b>	25%
Class Participation	In class	Each class	10%
Final Exam	Close-book 3-hour exam	TBA	50%
Total			100%

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.

65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
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0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

### **Academic Integrity:**

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### **Class Schedule (tentative):**

<b>ClassTime</b>	<b>Course Contents</b>
<b>Week 1</b> Jan. 9 & 12	<b>Topics:</b> Course outline What is Financial Accounting? Forms of Business Organizations The Accounting Framework  <b>Reading:</b> Ch 1 –Purpose and Use of Financial Statements pp. 1-1to 1-27. Ch 11-Shareholders'Equity pp. 11-1to 11-7 (top) Ch 2 –A Further Look at Financial Statements pp. 2-20to 2-26  <b>Problems*:</b> <ul style="list-style-type: none"> <li>• BE1.1</li> <li>• E1.2</li> <li>• BE1.5</li> <li>• BE1.6</li> <li>• BE2.9</li> </ul>
<b>Week 2</b> Jan. 16 & 19	<b>Topics:</b> Income Statement –Multi-Step (only) Statement of Changes in Equity Statement of Financial Position  <b>Reading:</b> Ch 5 Merchandising Operations pp. 5-19 to 5-26 (middle) & pp. 5-32 (ONLY the Multi-Step Income Statement will be used in this course) Ch 1 – read p. 1-24 (bottom) to 1-25. See p. 1-16 (example) Ch 2 – A Further Look at Financial Statements pp. 2-1to 2-19  <b>Problems:</b> P2.4A
<b>Week 3</b> Jan. 23 & 26	<b>Topics:</b> Accounting Process  <b>Reading:</b> Ch 3 –The Accounting Information System pp. 3-1to 3-38  <b>Problems:</b> <ul style="list-style-type: none"> <li>• E3-3</li> <li>• BE3-9</li> <li>• ACR 4.1 (N.B. this is Ch. 4) parts a), b), and c).</li> </ul>
<b>Problem Set #1 is due by 8p.m January 29</b>	
<b>Week 4</b> Jan 30 & Feb 2	<b>Topics:</b> Accruals and Adjusting Entries  <b>Reading:</b> Ch 4 – Accrual Accounting Concepts pp. 4-1 to 4-33 & pp 4-40 (middle) to 4-43 (top) (Can omit Closing Entries pp. 4-33to 4-40)  <b>Problems:</b> <ul style="list-style-type: none"> <li>• E4-1 (use the IFRS five-step revenue recognition model)</li> <li>• ACR 4.1 parts d), e), and f)</li> </ul> (continuation of ACR4.1 from Week 3)

Week 5 Feb 6 & 9	<p>Topics: Internal Control and Cash Non-Strategic and Strategic Investments</p> <p>Reading: Ch 7 – Internal Control and Cash pp. 7-1 to 7-27 Ch 12 Reporting &amp; Analyzing Investments pp. 12-1 to 12-5 (middle)</p> <p>Problems:  <ul style="list-style-type: none"> <li>• BE7.13</li> <li>• P7.1A</li> <li>• E7.9</li> <li>• BE12.1</li> </ul> </p>
<b>Problem Set #2 is due by 3p.m Feb 13.</b>	
Week 6 Feb 13 & 16	<p>Midterm review;</p> <p><b>Midterm exam on Feb 16</b>  <b>-in class</b>  <b>-close book</b>  <b>-25 multiple choice questions in 70 minutes.</b></p>
Week 7	Reading Break. Classes are cancelled.
Week 8 Feb 27 & Mar 2	<p>Topics: Receivables</p> <p>Reading: Ch 8- Reporting &amp; Analyzing Receivables pp. 8-1 to 8-19</p> <p>Problems:  <ul style="list-style-type: none"> <li>• BE8-5</li> <li>• E8-5</li> <li>• P8-5A</li> <li>• P8-7A</li> </ul> </p>
Week 9 Mar 6 & 9	<p>Topics: Merchandising Operations COGS Three Inventory Methods</p> <p>Reading: Ch 5 – Merchandising Operations pp. 5-1 to 5-18 (top) Ch 6 – Reporting &amp; Analyzing Inventory pp. 6-1 to 6-22 (middle)</p> <p>Problems:  <ul style="list-style-type: none"> <li>• BE5-17</li> <li>• E5-16 (perpetual only)</li> <li>• E6-4</li> <li>• E6-7</li> <li>• E6-11</li> </ul> </p>
<b>Problem Set #3 is due by 8p.m March 12</b>	
Week 10 Mar 13 & 16	<p>Topics: Long Term Assets</p> <p>Reading:</p>

	<p>Ch 9 – Recognizing and Analyzing Long Lived Assets pp. 9-1 to 9-15; pp. 9-18 (bottom) to 9-32 (top) (DO NOT Read pp. 9-16 to 9-18 (middle) Impairments, Revaluation Model, Revising Periodic Depreciation, Natural Resources)</p> <p>Problems:</p> <ul style="list-style-type: none"> <li>• P9-1A</li> <li>• P9-4A</li> <li>• E9.8</li> <li>• P9-9A</li> </ul>
<p>Week 11 Mar 20 &amp; 23</p>	<p>Topics: Liabilities</p> <p>Reading: Ch 10 – Reporting &amp; Analyzing Liabilities pp. 10-1 to 10-4 (top); pp. 10-9 (bottom) to 10-14; pp. 10-18 (middle) to 10-20 (middle)</p> <p>Problems:</p> <ul style="list-style-type: none"> <li>• E10-5</li> <li>• BE 10-4</li> </ul>
<p>Week 12 Mar 27 &amp; 30</p>	<p>Topics: Shareholders' Equity</p> <p>Reading: Ch 11 – Reporting &amp; Analyzing Shareholders' Equity pp. 11-5 to 11-25 (top) (you can omit pp. 11-26 to 11-33)</p> <p>Problems:</p> <ul style="list-style-type: none"> <li>• E11-6</li> <li>• P11-3A</li> <li>• P11-7A (Pt a only and ignore closing entries)</li> </ul>
<p><b><i>Problem Set #4 is due by 8p.m April 2(Sunday)</i></b></p>	
<p>Week 13 Apr 3 &amp; 6</p>	<p>Topics: Statement of Cash Flows</p> <p>Reading: Ch 13 – Statement of Cash Flows- pp. 13-1 to 13-27</p> <p>Problems:</p> <ul style="list-style-type: none"> <li>• P13.5A</li> <li>• P13.3A</li> </ul> <p>Final Exam Review</p>
<p><b><i>Problem Set #5 is due by 8p.m April 8(Saturday)</i></b></p>	
<p><b><i>Final Exam: 3-hour close-book exam. Time and Location: TBA</i></b></p>	

*\*Please note: BE is Brief Exercise; E is Exercise; P is Problem (Set A or Set B). These are found at the end of each chapter in the textbook. e.g., BE1.5 means Brief Exercise 5 in Chapter 1.*

*\*\* The above schedule is an estimate of timing and topic coverage and is subject to change. Any changes will be announced in class and posted on Course Space.*

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to

approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



## COM 220

### Organizational Behaviour Spring 2024

#### Course Outline (Tentative)

Note: please check your course and program sites frequently for new updates and course changes.	
Course hours (PST)	A01: MR 8:30 -10:45 AM (CLE A224) A02: MR 11:30 AM -12:45 PM (DSB C103)
Location	See above
Instructor:	Dr. Sang H. Nam
Office:	BEB 220
Office hours:	Friday 3-5 pm and by appointment
Telephone:	250-721-6402
Email:	snam@uvic.ca

***We acknowledge and respect the lək'wəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting  
A supportive and safe learning and working environment for all its members.***

#### **Texts and Resources:**

Managing Across Cultures: Challenges, Strategies and Skills (2024) Steers, R.M. et al. (5th ed.): Cambridge University Press

#### **Course Objectives and Description:**

Organizations are complex social systems composed of many people performing different tasks in pursuit of broader organization goals. People, whether they work at the lowest or highest levels of the organization, represent one of its most important resources. The effectiveness with which organizations manage their human resources can therefore have an important influence on overall performance. To manage effectively requires a good understanding of people, work groups, organizations, and the processes that occur when both interact in a work relationship. Much of our time this term will be spent analysing the basic characteristics of people, organizations, and important organizational processes. The perspective taken in examining these topics will be managerial in nature. In other words, we are interested in how people and organizations can be more effectively managed to accomplish important goals. In taking this perspective, we will not neglect the importance of employees, who bring their own needs and aspirations to the workplace. The workforce in Canada is multicultural. Without understanding the importance of cultural

diversity, we may not be able to manage people effectively especially in the context of the Canadian mosaic culture.

### **Course Format:**

Lectures, Group Discussion (Learning Cell), Exercises, Team Project.

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse, and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

### **Evaluation Elements:**

<b>Title</b>	<b>Individual or Group</b>	<b>Type</b>	<b>Due Date</b>	<b>Weight of grade</b>	<b>Description</b>
Learning Cell	Individual	Hand-in assignment & participation in group discussion		40%	
Preliminary Presentations	Group		Feb. 5 & 8		PPT presentation (10 minutes)
Solving Real-Life OB Problems	Group	Video and 1-page exec. summary	Mar. 25 & 28	60%	creating and presenting a 10-minute video
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can

be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

### **Learning Cell (40%)**

In this course, the term "learning cell" will refer to a procedure in which the students will meet in small units (about 6 students each) during a class period to question each other and discuss an assignment which each has prepared beforehand. The aims of this procedure are:

- a) to get all of you actively involved in the learning process
- b) to develop your ability to think critically about what you read
- c) to have you gain, through first-hand experience, and appreciation for the multiplicity of approaches to fundamental questions.
- d) to enable you to test your ideas and opinions about the readings with those of others from a variety of backgrounds
- e) to develop an appreciation of learning as an ongoing cooperative endeavor in which the emphasis is on fruitful questions rather than facile answers.
- f) to get to know each other

It should be emphasized that the ability to reflect critically is an acquired skill; hence, it is expected that you will get better at it as you go along. Please note, as well, that reflecting critically on a text does not necessarily mean disagreeing with it. Rather, it involves a sensitive and careful analysis in which one engages in evaluation while avoiding distortion. The nature of the analysis will depend to some extent, of course, on the type of material being considered. On the whole, you will be striving to:

- identify the author's aims and methods
- focus on key themes and ideas
- reconstruct and evaluate theoretical arguments
- point out any presuppositions or assumptions

### **Preparation for Learning Cell: \_**

The aim of your preparation is to produce a satisfactory set of QUESTIONS AND ANSWERS, so as to enable you to discuss the assigned reading fruitfully in a small unit with other students. Please note that assignments must be typed and single-spaced. If you are unsure how to proceed, you may find the following suggestions helpful:

Step 1: Read the assigned material rapidly to gain a general overview.

Step 2: Go through the material again, but this time make a brief outline of the contents. As you do this, note the central issue (or issues), the method used to explore that issue (or those issues) and the steps taken in the development of the main theme or argument. Try to focus on the most important features (although there may be instances where minor issues are also worth considering).

Step 3: On the basis of your notes and with a view to accomplishing the sort of analysis mentioned above, draw together what appear to you to be the most crucial features and prepare TWO QUESTIONS on them (no matter how many required reading selections are involved) which you can pose to the other students in your cell. Phrase your questions in such a way as to elicit discussion of the main issues, rather than "yes" or "no" responses.

Try your best to make your questions thought provoking, interesting and meaningful from a managerial perspective. Phrase the questions in such a way for you to ask the students in

your cell TO DISCUSS WHAT THE PARTICULAR THEORETICAL OR PRACTICAL VIEW ACTUALLY IS, AND WHAT THEY THEMSELVES THINK OF IT. Keep your questions as concise as possible, and avoid introducing them with statements. For each question, prepare what you consider to be the best answer. YOU WILL SUBMIT ONLY YOUR QUESTIONS (NOT ANSWERS) at the end of the course. You prepare answers for group discussion only. Please check your assignments carefully for SPELLING, GRAMMAR, AND SEXIST LANGUAGE.

### **Learning Cell in Action:**

On the dates for which there are to be learning cell sessions, you will be assigned to group of about 6 students per cell on a random basis. When you get together,

- 1) Write down all the names of participants. Full names.
- 2) Appoint a spokesperson. He/she will play the role of leader, facilitator, and timekeeper (30 minutes) during the discussion,
- 3) When the discussion is completed, each team member will evaluate the other team members' performance and choose confidentially the best two (BQ: best question and BA: best answer to your question). Briefly describe the rationale for your choice (5 minutes)
- 4) The spokesperson will summarize the highlighting points and key takeaways from the discussion with the group (5 minutes) and share them with the whole class after the discussion is over.

### **Submission of Your Assignments:**

- 1) Your name, team number, and two questions (no answers)
- 2) The names of all participants
- 3) Your choice of BA & BQ (full names with brief description of your rationale for choosing)

\* Thanks to Dr Monika Langer for this idea.

### **Team Project "Solving real-life OB Problems" (60%):**

Imagine your team is a group of management consultants specializing in OB. Identify a local (or anywhere) company (your client) that experiences OB problems related to managing cultural (or other kinds of) diversity. Conduct research (e.g. interviews with the key individuals) on your client company to identify the root cause of the problems. Your goal is to help the company solve their people problems by offering practical solutions and suggestions based on valid data and theories. Try to integrate major concepts and theories you have learned from this course in your analysis and recommendations.

Your team is expected to create **a documentary** (10 minutes long) on the topic. What matters is the quality of your message (e.g., originality, based on real problems, realistic, specific, and meaningful solutions and suggestions, etc.). It is equally important that your video is technically excellent (e.g. sound, images, background music, etc.). Prepare one-page executive summary of the highlighting points of your documentary. Submit both your video file and one-page executive summary on the day of presentations. I also strongly recommend your team to deliver your final video to your client company to get their feedback for the sake of learning.

I expect each one of you to be a responsible and active team member. Your ability to work in a team is of paramount importance in today's organizations. Your contribution to the team process and outcome will be evaluated by your peer members, which may affect your individual grade for the team project.

**Preliminary Presentations (Feb 5 & 8):** Make a 10-minute PPT presentation on the background of your client company and their major OB problem. Explain why they



experienced the problem and offer your preliminary recommendations. Explain how your team will collect valid data (e.g., benchmarking, interviews, survey, etc.) to support your argument. The main purpose of this session is to share your ideas together with the class and help one another by seeking feedback from the other teams.

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

### **Course Assessment:**

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility.

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: Late work will NOT be accepted.

Attendance and Participation: Regular attendance is an expectation for Commerce classes. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to

be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

**Missed Coursework or Assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.

### **Attendance and Participation:**

Regular attendance is an expectation for Gustavson School of Business courses. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. Attendance is a critical component of everyone's academic success.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that "A" grades are normally achieved by a minority of students.**

Percentage Range	Grades	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

"N" (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

In Gustavson School of Business courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

<b>Grade Range</b>	<b>Proportion Of Class</b>
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

<b>Grade Range</b>	<b>Proportion Of Class</b>
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

### **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation.
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### **Schedule Summary (Teantative)**

<b>Topic</b>	<b>Type</b>	<b>Due Date</b>	<b>Reading Chapters</b>
Introduction	<b>Zoom sessions *</b>	Jan 8	
Culture and Management		Jan 15 & 18	Ch. 1-3
Communication	LC Practice I	Jan 22 & 25	Ch. 7
Managing Teams	LC Practice II	Jan 29 & Feb 1	Ch. 10
<i>Team Project Preliminary Presentations</i>		<i>Feb. 5 &amp; 8</i>	
Leadership & Motivation	LC1	Feb. 12 & 15	Ch. 5 & 6
<b>Reading Break</b>		<b>Feb. 19-23</b>	
Managing Responsibly and Decision Making	LC2	Feb 26 & 29	Ch. 8
Guest Speaker: Mr. Bob Lawrence, Founder and CEO of VEER		Mar. 4	<a href="http://www.veeradvisors.com">www.veeradvisors.com</a>
Global Negotiation	LC3	Mar. 11 & 14	Ch. 9
Global Career (Working and Living Globally)	LC4	Mar. 18 & 21	Ch. 11
<i>Team Project Final Presentations</i>		<i>Mar. 25 &amp; 28</i>	<i>Video (10 minutes) presentation by each team</i>
Wrap-up		April 1 & 4	

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

\*The first session will be online (Zoom): See below. The other sessions will be in person.

<https://uvic.zoom.us/j/81776671960?pwd=UVRySGN6UWhSQWtwcDdMRXliMGhEUT09>

Meeting ID: 8177667 1960

Password: 076123

One tap mobile

+16475580588,,81776671960#,,,0#,,076123# Canada

+17789072071,,81776671960#,,,0#,,076123# Canada

Dial by your location

+1 647 558 0588 Canada

+1 778 907 2071 Canada

Meeting ID: 8177667 1960

Password: 076123

Find your local number: <https://uvic.zoom.us/j/81776671960?pwd=UVRySGN6UWhSQWtwcDdMRXliMGhEUT09>



## COM 240A01/ A02

### Management Finance Spring 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	Section A01: Monday and Thursday 11:30am-12:50pm (80 mins) Section A02: Monday and Thursday 10am-11:20am (80 mins)
Location	Clearihue Building A127
Instructor:	Dr. Qianqian Du
Office:	BEC 212
Office hours:	Regular hours: Wednesdays 1-3pm. In-person or Zoom meetings outside regular hours are possible. All meetings are by e-mail appointments only.
Email:	qianqiandu@uvic.ca

***We acknowledge and respect the lək' wəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting  
A supportive and safe learning and working environment for all its members.***

### **Introduction:**

I am an Associate Professor of Finance at the Gustavson School of Business, University of Victoria. I received my B.A. in Economics from Shandong University in China, my M.Sc. in Economics from the University of Oxford in UK, and my Ph.D. in Business Administration from the University of British Columbia. My research areas include private equity, financial analysts, and corporate governance. I have taught courses in entrepreneurship, corporate finance, and management accounting in UBC, Shanghai Advanced Institute of Finance-Shanghai Jiao Tong University, and the Hong Kong Polytechnic University.

Our management finance course aims to provide some basic concepts and their applications to solve real finance problems faced by corporations. Finance equips us with necessary skills to identify and diagnose possible problems faced by corporations. It enables us to evaluate the financial health of corporations and provide alternatives to address their financial concerns. The financial skills we will learn in this course are easily applied to evaluate our personal financial health, so it is an applied course by nature.

Welcome to the Management Finance course!

To get ready for the class, I encourage you to preview chapters assigned to each topic. This can be found in the “class schedule”. During the class, we will use lecture notes and in-class discussion to introduce financial concepts and theories. I expect active participation from our class. The process of discussing questions and providing feedback on classmates’ work not only improves our own understanding of the topic but also gives us opportunities to learn from each other. Please provide a name tent to facilitate class interactions. Before each review class begins, you will be given some problems to practice, and we will discuss the solutions in the review class.

You are encouraged to contact me during the semester. If you have questions and concerns about this class or studying finance in general, please contact me by email or talk to me during my office hours.

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

### **Educational Technology**

I use a variety of educational technology in this course including internet-based technologies or web-based applications. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC’s Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: ZOOM. I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at <https://explore.zoom.us/en/privacy/>. I encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

### **Evaluation Elements and Course Assessment:**

#### **Quizzes(30%):**

There will be **five in-class quizzes** to reinforce our learning. Each quiz covers materials taught in multiple classes and it is designed to check the progress of your study and make sure you receive

timely feedback on your progress. Quiz questions may include multiple choice questions, quantitative questions, or both. All quizzes are completed in class. Details regarding each quiz will be posted on BrightSpace and a tentative schedule is included in the class schedule section.

Each quiz accounts for **6%** of the final grade so all quizzes account for **30%** of the final grade. Failure to submit a quiz will lead to a grade of 0% on that quiz. Please try your best to come to all classes and complete all quizzes. If you experience any difficulties, please contact me as soon as possible. Based on your circumstances, I will decide whether to give you another quiz or seek alternatives.

### **Company Analysis(15%):**

At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility.

The group project for this course is to analyze **a real problem** faced by a public company based on **what we have learned in this course**. The problem should be covered by mainstream business media (e.g., Wall Street Journal, Financial Times, Bloomberg, etc.) **in the year 2022**. Please include the source of the news in your report.

You are responsible for forming your own group and choosing your own topic. The number of group members **should not exceed 5**. The information of your group members and choice of firm should be sent to me by the end of the third week by **6pm January 28, 2023**. If you cannot find any group, please inform me at the beginning of the third week on January 23.

There is no template for the group report, and it should be logical, concise, and convincing. The main body of the report (excluding table of contents, appendices, etc.) should not exceed 15 pages. Your report should be double-spaced with a font size 12.

We reserve **last week's class April 3 & 6 for group presentations**. Depending on the number of groups formed by our class, the presentation schedule and the duration of each presentation will be announced after all groups are formed. **The final report of your group is due by 6pm April 8** on BrightSpace. The evaluation will be based on your report (60%) and your presentation (40%).

It is an expectation that students contribute equitably to all team assignments. If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

### **Attendance and Participation (10%):**

Regular attendance is an expectation for Commerce classes. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Students with unexcused absences\* from **more than 20% of class sessions** will **receive a grade of zero in class participation**.



\*unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site.

### ***Final Exam(45%):***

The final exam will be 3 hours, covering all materials used in this course. It is a closed book exam and non-programable calculator can be used during the exam. Cell phones or pre-programmed calculators are not allowed. The schedule will be announced later in the Registrar's examination period.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of **5%** for each day an assignment is late.

The following table summarizes all elements in our evaluation:

Elements	Individual or Group	Description	Due Dates	%of Grade
Quizzes (5)	Individual	In class, 30-40minutes	See "Class Schedule"	6% each, 30% in total
Company Analysis	Group	Class presentations and Written reports	Class presentations on Apr 3 & 6. Reports due on April 8 at 6pm.	15%
Participation	Individual	In-class	Every class	10%
Final Exam	Individual	3-hour exam	Registrar's exam period	45%
Total				100%

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

## **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grade s	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

*Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.*

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

## **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student’s record in the Registrar’s office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.

- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### **Tentative Class Schedule:**

#	Class Time	Topic & Reading BCR 5 <sup>th</sup> Ed
1	Week 1: Jan 9	Introduction to Finance Reading: 1.1-1.5
2	Week 1: Jan 12	Corporate Finance Reading: 2.1-2.6
3	Week 2: Jan 16	Time Value of Money Reading: 5.1-5.5
4	Week 2: Jan 19	Loans and Mortgages Reading: 5.6-5.7
5	Week 3: Jan 23	Review Class
6	Week 3: Jan 26	<b><u>Quiz #1: based on classes #1-#4</u></b>  Bond Valuation and Price Reading: 18.1-18.4; 6.1-6.2
<b><u>Group information and choice of firm due by 6pm January 28 (Saturday).</u></b>		
7	Week 4: Jan 30	Bond Yields and Risks Reading: 6.3-6.4; 18.5
8	Week 4: Feb 2	Equity -Preferred Shares, Common Shares Reading: 7.1-7.2; 7.4; 19.1-19.3
9	Week 5: Feb 6	Equity Valuation Reading: 7.3
10	Week 5: Feb 9	Review Class
11	Week 6: Feb 13	<b><u>Quiz #2: based on classes #6-#9</u></b>  Risk, return and portfolio theory - Part I Reading: 8.1-8.3
12	Week 6: Feb 16	Risk, return and portfolio theory –Part II

		Reading: 8.4-8.6
<b>Week 7 READING BREAK– NO CLASS</b>		
13	Week 8: Feb 27	Capital asset pricing model (CAMP) Reading: 9.1-9.3; 20.6
14	Week 8: Mar 2	Review Class
15	Week 9: Mar 6	<b><u>Quiz #3: based on classes #11-13</u></b>  Weighted Average Cost of Capital (WACC) Use slides not BCR
16	Week 9: Mar 9	Financial Statement Analysis Readings: 4.1-4.7
17	Week 10: Mar 13	Financial Forecasting Readings: 4.8
18	Week 10: Mar 16	Review Class
19	Week 11: Mar 20	<b><u>Quiz #4: based on classes #15-17</u></b>  Capital budgeting–Part I Readings: 13.1-13.2
20	Week 11: Mar 23	Capital budgeting–Part II Readings: 13.3-13.4
21	Week 12: Mar 27	Contemporary Topics in Corporate Finance  Review class
22	Week 12: Mar 30	<b><u>Quiz #5: based on classes 19-21</u></b>  Final Exam Review
<b>Week 13: CLASS PRESENTATIONS on Apr 3 &amp; 6. Project reports due by 6pm Apr 8.</b>		
<b>FINAL EXAM: 3-hour closebook exam. time, and location TBA.</b>		

*Note:* The above schedule is tentative. As classes proceed, we may revise it. Any revision will be posted on BrightSpace ahead of time.

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

## COM247 (A01)

### Personal Financial Management

#### Spring 2024 Course Outline

Note: please check your course and program sites frequently for updates and course changes.

Course hours (PST)	Monday and Thursday, 11:30-12:50
Location	ECS 124
Instructor:	Professor Michael R. King
Office:	BEC 246
Office hours:	Thursdays 13:30-14:30 or email for appointment
Email:	<a href="mailto:michaelking@uvic.ca">michaelking@uvic.ca</a>

***We acknowledge and respect thelək'wəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting a supportive and safe learning and working environments for all its members.***

### Introduction:



My name is Michael King. Please call me "Michael," not Professor, Dr. or Mr. King. I joined Gustavson in July 2019. I went to high school in Victoria, then left to travel the world. I lived in seven countries for more than a year each. I met my German wife in London, UK. We have two sons (24, 21) who are both at UBC. We are all glad to be living in beautiful BC!

Prior to UVic, I taught at Western University's Ivey Business School (2011-2019) where I co-founded Canada's first fintech research centre. Before joining academia, I worked in investment banking in Zurich, New York and London from 1990-1998 (Credit Suisse, RBC Dominion Securities) and central banking in Ottawa and Basel from 2001-2011 (Bank of Canada, BIS). I have an MSc and PhD from the London School of Economics and have earned the CFA designation. My research focuses on climate finance, fintech, banking, international financial markets, and corporate finance.

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodation, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodation. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

## Texts and Resources:

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### REQUIRED:

#### **Personal Finance, 8th Edition (2021, McGraw Hill Canada)**

by Jack R. Kapoor, Les R. Dlabay, Robert J. Hughes, Lewis Stevenson, Ernest J. Kerst

ISBN eBook: 9781260890167 \$59.00 180 day / \$99.00 lifetime

ISBN print textbook: 9781260326956 \$139.95 (available in UVic Campus Bookstore or online)

Students are encouraged to use a digital copy of the textbook (eBook) which is available for rent or purchase from McGraw Hill Canada at this website:

<https://www.mheducation.ca/personal-finance-9781260326956-can-group>

*When purchasing the eBook, you do NOT need to purchase access to McGraw Hill CONNECT.*

### OPTIONAL:

I will post news stories and articles from leading media outlets: The Economist, Bloomberg, The Globe and Mail, and others. The stories will be timely, interesting, and relevant. I will not overwhelm you, but this real-world content will bring the course to life! This material is important for your personal development. I hope you will read it, but it will not be assessed.

## Course Objectives and Description:

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This course gives students the tools to take charge of their financial lives. It provides answers to the financial questions that everyone asks themselves:

1. How do I manage my finances?
2. Where does my money go?
3. How much am I earning?
4. Where should I put my money?
5. How much can I borrow?
6. How should I borrow?
7. Should I buy a car?
8. Should I buy or rent a place to live?
9. Where should I invest?
10. Do I need insurance?
11. Will I be able to retire?
12. Can I trust this email from my bank?

These questions cover financial wellbeing, budgets, work and taxes, debt and credit, investing in real and financial assets, insurance, retirement savings, and phishing. By completing this course, students will be ready to make educated financial decisions and manage their personal finances. The three major learning outcomes are:

#### **Promote Financial Well-Being:**

- Students will feel empowered with the knowledge and skills necessary to achieve and maintain financial well-being. Through an exploration of personal financial planning, budgeting, and prudent decision-making, students will be equipped to navigate the complexities of their financial lives, fostering a sense of security and stability.

#### **Build Financial Acumen:**

- Students will cultivate confidence in proactively building and managing their financial resources. By imparting essential concepts such as effective budgeting, strategic saving, and informed investing, the course aims to instill the confidence needed for students to take control of their finances, ensuring a resilient and prosperous future.

### **Avoid Financial Pitfalls:**

- Recognizing the significant impact of debt on financial well-being, students will be armed with the knowledge to avoid common pitfalls associated with borrowing. By delving into responsible borrowing practices, debt management strategies, and understanding the consequences of consumer credit, students will be better equipped to make informed decisions and safeguard themselves from the adverse effects of excessive debt.

COM247 is divided into eleven modules with these associated learning outcomes.

#### **1. Personal Financial Planning:**

Students will develop comprehensive personal financial plans, integrating short-term and long-term financial goals, considering factors such as income, expenses, and life events, to make informed decisions for financial well-being.

#### **2. Budgeting and Saving:**

Through practical exercises, students will learn to create effective budgets, identify areas for potential savings, and implement strategies to build a financial cushion, fostering responsible financial habits for a secure future.

#### **3. Personal Income Taxes:**

Students will navigate the Canadian tax system, understand deductions from wages, tax documents, and tax planning strategies. They will learn to make informed decisions about whether to file their taxes independently or enlist the services of an accountant, considering factors such as complexity, cost, and potential benefits to optimize their tax outcomes.

#### **4. Banking and Financial Services:**

Students will understand the range of banking products and financial services available in Canada, enabling them to make informed choices regarding types of accounts (including TFSAs) and short-term investment options (GICs, high-interest savings accounts).

#### **5. Debt and Consumer Credit:**

Students will explore the impact of debt on personal finances, learning responsible borrowing habits, effective debt management strategies, and the importance of maintaining a healthy credit score.

#### **6. Owning a Car:**

Students will learn the financial aspects of owning and maintaining a vehicle, covering purchase, insurance, financing options, maintenance, and the impact of transportation choices on overall financial health.

#### **7. Buying vs. Renting Real Estate:**

Students will evaluate the financial implications of homeownership versus renting, considering factors such as market trends, real estate and closing costs, mortgage options, and long-term financial goals.

#### **8. Investing in Stocks, Bonds and ETFs:**

Students will learn the fundamental principles of investing, including risk and return tradeoffs, portfolio diversification, fees, the features of financial securities (stocks and bonds) and the benefit of investment vehicles (mutual funds and exchange traded funds). They will learn how to get started, compare self-directed investing with other options, consider dollar cost averaging, and take into account trading costs.

#### **9. Understanding Insurance:**

Students will gain a basic understanding of insurance products, including employment, health, auto insurance, property, life and travel. They will learn about the importance of protecting themselves and their assets.

#### **10. Planning for Retirement:**

Students will learn about alternative retirement savings vehicles, develop retirement savings strategies, and explore investment options to set up for a secure and well-planned financial future.

#### **11. Phishing, Consumer Scams and Identity Theft:**

Students will learn to recognize phishing and consumer frauds and protect themselves against identity theft. They will learn how to safeguard their personal and financial well-being from cybersecurity threats.

## Course Format:

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Our weekly classes will be held face-to-face unless specified otherwise. Please watch for emails and check the course website on Brightspace. Our classes are facilitated discussions where we hold a discussion and work through financial calculations together. I hope to hear your thoughts, experiences, and questions. I will facilitate the discussion, keeping things on track by asking questions. A class is more interesting when everyone actively participates.

Each class will have designated readings. We will touch on some but not all of this material during our classroom discussions. During class, I may split you up into buzz groups of 2 to 4 to brainstorm on a topic and then rejoin the group to share your insights.

Research on the mind demonstrates that we learn better when we take in chunks of information, we practice it (repetition), and we evaluate it. This process allows your mind to create new neural pathways, programming your brain to remember more chunks<sup>1</sup>. Each week, you will need to complete a quiz on Brightspace to evaluate your comprehension. Each week's quiz will cover the topics from the recent classes, focusing on the assigned readings and slides from class. Optional articles and postings will benefit you but will not be examined in quizzes.

## Equity, Diversity and Inclusion:

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Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community.

Please let me know if I can do better to support your rights in our classroom. You can email me to meet privately or send me feedback. I will do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

## Educational Technology

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I use a variety of educational technology in this course including Excel, internet-based technologies or web-based applications (Brightspace), cloud services and news media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

We will be using Excel extensively in this course. Excel is the main tool used for modeling personal finances. It surpasses financial calculators as it offers dynamic, customizable, and professional-grade financial analysis. Excel's versatility aligns with workplace standards, making it an essential skill for career success.

Students unfamiliar with Excel should prioritize mastering this tool for its real-world applicability and wide-ranging financial modeling capabilities. You can find introductory videos on YouTube, including the series "Excel for Beginners" from *Technology for Teachers and Students* at:

[https://www.youtube.com/playlist?list=PL\\_iwD7O7FG7i6PCpD7cSoW3AkVsgS0Vgi](https://www.youtube.com/playlist?list=PL_iwD7O7FG7i6PCpD7cSoW3AkVsgS0Vgi)

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<sup>1</sup> See Barbara Oakley, "Learning how to learn", Coursera, <https://www.coursera.org/learn/learning-how-to-learn>.



Within Excel, you can find tutorials by typing “Excel for Windows training” in the bar “Tell me what you want to do...”

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC’s Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual, for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: **Excel, VitalSource Bookshelf, the McGraw Hill mobile app (if using eBook), and potentially Zoom.** I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at the link below. I encourage you to read these documents.

<https://support.vitalsource.com/hc/en-us/articles/201646123-VitalSource-Technologies-LLC-Privacy-Policy>

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

## Evaluation Elements:

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Students will be evaluated based on the following five elements:

CATEGORY	Individual or Group	Type	Due Date	% of grade	Description
1. Attendance	Individual	Participation	Every class	10%	Sign in, on time, not disturbing learning of your classmates
2. Weekly quizzes	Individual	Brightspace quiz	Weekly, complete from Friday to Sunday	25%	Complete ten 30-minute quizzes based on readings and slides.
3. Weekly individual assignments	Individual	Brightspace upload	Due by start of individual class	25%	Complete eight assignments and submit prior to class.
4. Team capstone project	Teams	Upload Assignment	8 April 20:00 PT	15%	Teams of 5 students submit a financial plan (with Excel spreadsheet).
5. Final exam	Individual	In person	To be scheduled	25%	2 hours

## Attendance (10%)

I will have a sign-in sheet for class each week. Find your name and sign next to it as you enter or leave class. If you forget to sign-in, please email me to confirm your attendance, summarizing something that we discussed in class. It is part of our academic integrity standards that you only sign for yourself, and not an absent classmate.

## Weekly Quizzes (25%)

Students will complete ten (10) quizzes worth a combined total of 25% of their final grade. Each quiz will be on Brightspace. Quizzes will be scheduled once per week, starting in the second week of the course. Each quiz will cover the assigned readings and covered over the previous week, unless specified otherwise. Several quizzes will cover multiple classes. You should have your reading materials available and an Excel spreadsheet for any calculations.

Your weekly quiz will open on Friday at 08:00 PT and must be completed by Sunday at 20:00 PT. Students will have 30 minutes to complete the quiz once it has begun. At the end of 30 minutes, the quiz will close automatically, and any work will be submitted. Students with accommodation will receive the appropriate additional time.

**A failure to attempt a quiz will lead to a grade of 0% on that quiz.** Your grade for the quiz and feedback will be released by Monday 11:30 PT.

If you experience technical difficulties, please email your instructor with an explanation of what happened as soon as possible. Based on your circumstances, your instructor will then decide whether to reset your quiz or not. Please allow for delays if you are emailing over the weekend.

Quiz	Opens Friday 08:00 PT	Closes Sunday 20:00 PT	Class	Chapters
1	Fri-19-Jan-24	Sun-21-Jan-24	1-4	Ch.1, 2
2	Fri-26-Jan-24	Sun-28-Jan-24	5-6	Ch.3, 4
3	Fri-2-Feb-24	Sun-4-Feb-24	7-8	Ch.5
4	Fri-9-Feb-24	Sun-11-Feb-24	9-10	Ch.6
5	Fri-16-Feb-24	Sun-18-Feb-24	11-12	Ch.1-6
6	Fri-1-Mar-24	Sun-3-Mar-24	13-14	Ch.7
7	Fri-8-Mar-24	Sun-10-Mar-24	15-16	Ch.10-11
8	Fri-15-Mar-24	Sun-17-Mar-24	17-18	Ch.12-13
9	Fri-22-Mar-24	Sun-24-Mar-24	19-20	Ch.8-9
10	Fri-5-Apr-24	Sun-7-Apr-24	21-23	Ch.14

Quizzes will consist of qualitative and quantitative questions. A question may be multiple choice, match the answer, or some other Brightspace format that can be graded automatically. For some quantitative questions, you will be asked to enter the numerical answer based on the inputs given. You will not be able to show your work. You are expected to use Excel to get the correct answer. If you make a mistake in Excel and submit the wrong number on Brightspace, you will get the question wrong. It is your responsibility to learn how to use this tool effectively.

It is the responsibility of a student seeking special accommodation to ensure that they have completed the appropriate documentation with the UVic Centre for Accessible Learning (CAL). It takes time for a letter of accommodation to be sent to the instructor, and for the adjustments to the quiz to be made in Brightspace. Please make sure to submit your request for accommodation early to ensure this process is

completed by the time of your quiz. For more information on this process, please visit <https://www.uvic.ca/services/cal/> or email [calexam@uvic.ca](mailto:calexam@uvic.ca)

### **Weekly Individual Assignments (25%)**

The eight weekly individual assignments are worth 25% of your final grade. They are due by 20:00 PT on the date shown. You will be provided with an Excel template. After completing the spreadsheet offline, you either upload the assignment on Brightspace or enter your answers in a designated assignment quiz. We will be discussing some of these assignments in class. For this reason, students failing to complete the associated assignment quiz on Brightspace by deadline will receive a grade of 0% on this assignment.

The assignments are as follows, with more detail and the Excel template to be provided on Brightspace and in class:

#	Due by 20:00 PT	Topic:
1	Wed-17-Jan-24	Assignment 1: University budget calendar year 2024
2	Wed-24-Jan-24	Assignment 2: Salary, deductions, and taxes
3	Wed-7-Feb-24	Assignment 3: Cashflow statement Jan (A)
4	Wed-14-Feb-24	Assignment 4: Credit affordability & capacity
5	Wed-28-Feb-24	Assignment 5: Buying & selling a car
6	Wed-6-Mar-24	Assignment 6: Buying & selling a condo
7	Wed-20-Mar-24	Assignment 7: Cashflow statement Feb (B)
8	Wed-27-Mar-24	Assignment 8: Income needs in retirement

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Team capstone project (15%)**

You will work in a team of 5 to complete a capstone project on personal financial planning. You will receive explicit instructions in class, with details posted on Brightspace. This project is due April 8, 2024, by 20:00 PT. One team member will email the final team report to [michaelking@uvic.ca](mailto:michaelking@uvic.ca), copying the other team members.

### **Final exam (25%)**

There will be a two-hour final exam during the exam period, worth 25% of your final grade. This exam will be completed in person. Details will be provided in class and posted on Brightspace.

### **Course Experience Survey:**

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The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. Also, toward the end of the term, you will receive an email inviting you to

complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

## Course Assessment:

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**Group Work:** At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, putting diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty."

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

**Late Work:** For quizzes, there is no flexibility on the deadline. In the absence of a medical or family emergency there will normally be a grade penalty for late individuals assignments and the team project. The final grade on late work will be reduced by 5% for every 24 hours after the due date and time.

### **Use of Artificial Intelligence (AI), including ChatGPT:**

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. I believe that AI tools, including ChatGPT, will be an important part of your career, enhancing your productivity. I encourage all students to familiarize themselves with these tools. ***These AI tools are permitted for the team capstone project in this course for students who wish to use them.*** To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI. Assignment guidelines will provide additional guidance as to how these tools might be part of your process for each assessment this semester and how to provide transparency about their use in your work.

## Attendance and Participation:

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Regular attendance is a critical component of everyone's academic success and an expectation for Gustavson School of Business courses. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning experience. Being an effective team member requires you to be present and engaged in the classroom environment.

Your success in this course is tied to your active participation and engagement. Attending classes, participating in discussions, and contributing to the learning environment are crucial elements that

enhance your understanding and application of financial concepts. To foster a positive and collaborative learning experience, we encourage regular attendance and active involvement in all course activities.

Your presence in class is not just about meeting a requirement; it is an investment in your future. Actively participating in discussions allows you to gain diverse perspectives, ask questions, and share insights. These interactions contribute significantly to your comprehension of personal financial management principles.

The skills you develop through active participation – effective communication, critical thinking, and teamwork – are essential for success in your future careers. Employers highly value individuals who not only possess technical knowledge but also demonstrate effective communication skills and the ability to work collaboratively. Your engagement in class discussions will not only deepen your understanding of personal finance but also cultivate these sought-after skills, positioning you for success in the competitive landscape of the professional world.

I understand that unforeseen circumstances may arise, and I encourage open communication. If you encounter challenges attending a class, please reach out in advance. Remember, your active involvement is an investment in your education and future success. Together, let's make this learning journey enriching, interactive, and beneficial for your personal and professional growth.

Attendance is a graded component of this course worth 10% of your final grade. I will ask each student to sign-in to class. Students with unexcused absences from **more than three classes** may not be permitted to finish the course. An unexcused absence is an absence without appropriate documentation (self-declaration form). To document an excused absence (illness, injury or family affliction), please submit the Gustavson self-declaration form. No medical documentation is required. Students need to email this self-declaration form to [michaelking@uvic.ca](mailto:michaelking@uvic.ca) by 18:00 on the day of the missed class. Self-declaration forms can be found in the Brightspace course site.

**Missed Coursework or Assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

## Grading Scale:

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Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. ***Please note that "A" grades are normally achieved by a minority of students.***

Percentage Range	Grade	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding, and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good, and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.

0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed, or you will receive a failing grade of N (grade point value of 0). Final course grades are official only after they have been approved by the Academic Director and may be subject to change up until that point.

## **Academic Integrity:**

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As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student’s record in the Registrar’s office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation.
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g., personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor’s consent and cannot sell or profit from the instructor’s intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

## Schedule Summary:

CLASS	DATE	TOPICS	READING
<b>MODULE</b>		<b>Personal Financial Planning:</b>	
1	Mon-8-Jan-24	Financial wellbeing, taking charge of your financial life, goals, time (TVM) & education	Ch.1
2	Thu-11-Jan-24	The Wealthy Barber: Pay yourself first (10% solution), compounding (TVM)	Ch.1
<b>MODULE</b>		<b>Budgeting and Saving</b>	
3	Mon-15-Jan-24	Map your spending habits, financial records, apps	Ch.2
4	Thu-18-Jan-24	Create a budget (personal cash flow statement)	
<b>MODULE</b>		<b>Personal Income Taxes</b>	
5	Mon-22-Jan-24	Personal income tax, deductions (EI, CPP), forms, filing, refunds (GST/HST credit, CAIP)	Ch.3
<b>MODULE</b>		<b>Banking and Financial Services</b>	
6	Thu-25-Jan-24	Banking, GIC, HISA, TFSA	Ch.3, 4
7	Mon-29-Jan-24	GUEST SPEAKER#1	
<b>MODULE</b>		<b>Debt and Consumer Credit</b>	
8	Thu-1-Feb-24	Credit Scores, debt (revolving, instalment), servicing & affordability/capacity	Ch.5, 6
9	Mon-5-Feb-24	TVM, interest rates, variable (prime rate) vs fixed, central bank, effective annual rate, PV, FV	Ch.5, 6
10	Thu-8-Feb-24	Revolving (credit cards, LoC, overdraft) vs Instalment (student loans)	Ch.5, 6
<b>MODULE</b>		<b>Owning a Car</b>	
11	Mon-12-Feb-24	Car buying, auto loan, insurance, gas, maintenance, resale	Ch.5, 6
12	Thu-15-Feb-24	Review Class	
	Mon-19-Feb-24	Family Day	
	Thu-22-Feb-24	Break	
<b>MODULE</b>		<b>Buying vs. Renting Real Estate</b>	
13	Mon-26-Feb-24	Process: MLS, realtors and fees, closing costs, mortgages	Ch.7
14	Thu-29-Feb-24	Rent vs. Buy case	Ch.7
<b>MODULE</b>		<b>Investing in Stocks, Bonds and ETFs</b>	
15	Mon-4-Mar-24	Stocks, risk and return	Ch.10, 11
16	Thu-7-Mar-24	Bonds, credit risk	Ch.12
17	Mon-11-Mar-24	Mutual funds and ETFs, portfolios, diversification	Ch.13
18	Thu-14-Mar-24	Brokerage, indexing / passive investing, dollar cost averaging, trading costs, crypto	Ch.10, 13
<b>MODULE</b>		<b>Understanding Insurance</b>	
19	Mon-18-Mar-24	Employment insurance, health, auto, home, life, travel	Ch.8, 9
20	Thu-21-Mar-24	GUEST SPEAKER#2	
<b>MODULE</b>		<b>Planning for Retirement</b>	
21	Mon-25-Mar-24	Pension plans, RRSP, OAS, CPP, inflation	Ch.14
22	Thu-28-Mar-24	Retirement exercise	Ch.14
	Mon-1-Apr-24	Easter	
<b>MODULE</b>		<b>Phishing, Consumer Scams, and Identity Theft</b>	
23	Thu-4-Apr-24	Avoiding Phishing, Scams and Identify Theft	---
24	Mon-8-Apr-24	Review Class	
	Thu-11-Apr-24	Exams begin	





CLASS	DATE	TOPICS	READING	Quiz	Assignment
		<b>MODULE</b>	<b>Personal Financial Planning:</b>		
1	Mon-8-Jan-24	Financial wellbeing, taking charge of your financial life, goals, time (TVM) & education	Ch.1		
2	Thu-11-Jan-24	The Wealthy Barber: Pay yourself first (10% solution), compounding (TVM)	Ch.1		
		<b>MODULE</b>	<b>Budgeting and Saving</b>		
3	Mon-15-Jan-24	Map your spending habits, financial records, apps	Ch.2		<b>1: Budget</b>
4	Thu-18-Jan-24	Create a budget (personal cash flow statement)		Quiz 1	
		<b>MODULE</b>	<b>Personal Income Taxes</b>		
5	Mon-22-Jan-24	Personal income tax, deductions (EI, CPP), forms, filing, refunds (GST/HST credit, CAIP)	Ch.3		<b>2: Salary, deductions and taxes</b>
		<b>MODULE</b>	<b>Banking and Financial Services</b>		
6	Thu-25-Jan-24	Banking, GIC, HISA, TFSA	Ch.4	Quiz 2	
7	Mon-29-Jan-24	GUESTSPEAKER #1			
		<b>MODULE</b>	<b>Debt and Consumer Credit</b>		
8	Thu-1-Feb-24	Credit Scores, debt (revolving, instalment), servicing & affordability/capacity	Ch.5	Quiz 3	<b>3: Cash Flow Statement Jan (A)</b>
9	Mon-5-Feb-24	TVM, interest rates, variable (prime rate) vs fixed, central bank, effective annual rate	Ch.6		
10	Thu-8-Feb-24	Revolving (credit cards, LoC, overdraft) vs Instalment (student loans)	Ch.5, 6	Quiz 4	
		<b>MODULE</b>	<b>Owning a Car</b>		
11	Mon-12-Feb-24	Car buying, auto loan, insurance, gas, maintenance, resale	Ch.5, 6		<b>4: Credit affordability &amp; capacity</b>
12	Thu-15-Feb-24	REVIEW CLASS	Ch.1-6	Quiz 5	
	Mon-19-Feb-24	Family Day			
	Thu-22-Feb-24	Break			
		<b>MODULE</b>	<b>Buying vs. Renting Real Estate</b>		
13	Mon-26-Feb-24	Buying a house MLS, realtors and fees, closing costs, mortgages	Ch.7		<b>5: Buying &amp; selling a car</b>
14	Thu-29-Feb-24	Buy vs. rent decision	Ch.7	Quiz 6	
		<b>MODULE</b>	<b>Investing in Stocks, Bonds and ETFs</b>		
15	Mon-4-Mar-24	Stocks, risk and return	Ch.10, 11		<b>6: Buying &amp; selling a condo</b>
16	Thu-7-Mar-24	Bonds, credit risk	Ch.12	Quiz 7	
17	Mon-11-Mar-24	Mutual funds and ETFs, portfolios, diversification	Ch.13		
18	Thu-14-Mar-24	Brokerage, indexing / passive investing, dollar cost averaging, trading costs, crypto	Ch.10, 13	Quiz 8	
		<b>MODULE</b>	<b>Understanding Insurance</b>		
19	Mon-18-Mar-24	Employment insurance, health, auto, home, life, travel	Ch.8, 9		<b>7: Cash Flow Statement Feb (B)</b>
20	Thu-21-Mar-24	GUESTSPEAKER #2		Quiz 9	
		<b>MODULE</b>	<b>Planning for Retirement</b>		
21	Mon-25-Mar-24	Pension plans, RRSP, OAS, CPP, inflation	Ch.14		<b>8: Income needs in retirement</b>
22	Thu-28-Mar-24	Retirement exercise	Ch.14	---	
	Mon-1-Apr-24	Easter			
		<b>MODULE</b>	<b>Phishing, Consumer Scams, and Identity Theft</b>		
23	Thu-4-Apr-24	Avoiding Phishing, Scams and Identify Theft	---	Quiz 10	





**COM 250 (A01)**  
**Fundamentals of Marketing**  
**Spring 2023 Course Outline**

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	Monday 6:30PM to 8:45PM
Location	<a href="https://uvic.zoom.us/j/4487638193">https://uvic.zoom.us/j/4487638193</a>
Instructor:	Dr. Linda Shi
Office:	BEC210
Office hours:	<u>Monday: 8:45PM-9:30PM</u> <u>Wednesday: 12PM-1PM</u>  Office Hour on Zoom  Join Zoom Meeting <a href="https://uvic.zoom.us/j/4487638193">https://uvic.zoom.us/j/4487638193</a> Meeting ID: 448 763 8193 One tap mobile +17789072071,,4487638193# Canada +16475580588,,4487638193# Canada  Dial by your location +1 778 907 2071 Canada +1 647 558 0588 Canada Meeting ID: 448 763 8193 Find your local number: <a href="https://uvic.zoom.us/u/kypuiqsxS">https://uvic.zoom.us/u/kypuiqsxS</a>
Email:	Please catch me during or after class or office hour for a prompt response.

*We acknowledge and respect the lək'wəḡən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.*

*UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.*

## **Texts and Resources:**

### **Required Case Pack:**

Harvard Casepack available at URL: <https://hbsp.harvard.edu/import/1012467>

Professor: Linda Shi

Course: COM250 Spring 2023 Fundamentals of Marketing

For subsequent access to the materials, you will need to log in at <https://hbsp.harvard.edu/>.

For technical assistance, please contact the Harvard Business Publishing Tech Help line at 800 545-7685 or 617-783-7600; or email [techhelp@hbsp.harvard.edu](mailto:techhelp@hbsp.harvard.edu). Our business hours are 24 hours a day, 7 days a week.

### **Textbook (Recommended but not Required)**

You can either read the relevant chapters in either paper-based text or online text. You DO NOT NEED TO BUY BOTH TEXTS.

The textbook is highly recommended because students who read textbook do better in class participation, project reports, and exams. However, I will not use test bank, quiz, assignments material of Pearson textbook. The required case pack, course slides and videos provided the fundamental information for the course.

### **Option 1: Paper-based Text:**

Marketing for Marketing: An Introduction 6th Edition or 7<sup>th</sup> Edition

Author(s): Armstrong, Gary | Kotler, Philip | Trifts, Valerie | Buchwitz, Lilly

Textbook ISBN-13: 9780134470528

Please note: All editions, including 4<sup>th</sup>, 5<sup>th</sup>, 6<sup>th</sup>, 7<sup>th</sup> edition, is acceptable.

### **Option 2: Online Text**

To register for COM 250 Marketing Principles:

1. Go to <https://mlm.pearson.com/enrollment/shi28566>.
2. Sign in with your Pearson student account or create your account.
3. Select any available access option, if asked.
  - » Enter a prepaid access code that came with your textbook or from the bookstore.
  - » Buy instant access using a credit card or PayPal.
  - » Select Get temporary access without payment for 14 days.
4. Select Go to my course.
5. Select MyLab Marketing for Armstrong: Marketing: An Introduction, 7th Ed from My Courses.

If you contact Pearson Support, give them the course ID: shi28566.

To sign in later:

1. Go to <https://mlm.pearson.com>
2. Sign in with the same Pearson account you used before.
3. Select MyLab Marketing for Armstrong: Marketing: An Introduction, 7th Ed from My Courses.

**Please note you DO NOT need to buy Pearson mylab quiz, assignment, or other related material. Only textbook is fine.**

## **Course Objectives and Description:**

The class is intended to help you understand the concepts and skills of the marketing process. You can understand the related marketing concepts and tools, form your own marketing philosophy, and apply these to your career planning after completing this course.

You will be able to perform the following tasks after completing this course:

1. Understand marketing process;
2. Develop a marketing plan to introduce a new product or improve your current marketing practice;
3. Apply the marketing process model to your future work.

## **Course Format:**

The course format is a combination of lectures, in-class discussions, cases, team presentations, and group project. Exam and group project are designed to help you review the concepts learned from this course and apply them into a real business environment.

## **Class Preparation**

In preparation for each class please complete all required assigned readings and activities, as we will be applying, not reviewing, posted content. For each of our sessions, please ensure that:

- You have closed unnecessary programs on your computer as you may be sharing your screen for some activities
- You arrive early to ensure a prompt start time and give you a chance to ensure your audio/video is working. It also gives us a chance to chat and connect.

## **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

## **Educational Technology**

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: youtube, google news and video. I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

### **Evaluation Elements:**

Students will be evaluated according to the following schedule:

<b>Title</b>	<b>Individual or Group</b>	<b>Type</b>	<b>Due Date</b>	<b>Weight</b>	<b>Description</b>
<b>Class Participation</b>	Individual	Participation	ongoing	10%	Based on attendance, group work, and in-class contribution
<b>Mid-term Exam</b>	Individual	Exam/Case	<b><u>Feb. 27</u></b>	20%	There will be <b><u>no make-up mid-term exam.</u></b>
<b>Group Presentation (Substitution to Mid-term Exam)</b>	Group	Case Presentation	<b><u>See syllabus case discussion date</u></b>	20%	Case presentation grade substitutes mid-term grade. Limited spots available.
<b>Group/individual Project</b>	Group/individual	Hand-in Assignment and In-class presentation for group (note: If you write report individually, you don't need to do in-class presentation)	<b><u>April 3</u></b>	30%	
<b>Final Exam</b>	Individual	Exam	TBD	40%	
<b>Total</b>				100%	

Note: There are limited time slots available for group case presentations. Students who actively participated in class discussion will be prioritized. If you are interested in the group case presentation opportunities, please organize your group of **no more than five people**

and **come to see meto register** for case presentation. You need to find at least one student to organize a group and you cannot register case presentation only by yourself.

There will be **no make-up mid-term exam**. Only the group members who contributed to case presentations don't need to write mid-term exam as your group presentation grade substitutes your mid-term exam grade (20%).

Note: There will be a peer evaluation feedback form for group work. In general, all members of the group will receive the same grades for the group work, such as case presentation and final course project. I may have to adjust your grade based on the written peer evaluation feedback to the group work. Please work with your group members and contribute to your group work.

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

### **Course Assessment:**

Description of evaluation standards for evaluation elements.

**Group Work:** At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility.

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of **5%** for each day an assignment is late.

Attendance and Participation: Regular attendance is an expectation for Commerce classes. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Students with unexcused absences from more than 2 class sessions will receive zero in participation and have their grade reduced by 5%, in addition students with unexcused absences from more than 5 class sessions may not be permitted to write the final examination.

\*unexcused absences = absences without appropriate documentation (e.g., self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g. illness) which interfere with their academic obligations.

**Contribution and Attendance (10%):** Regular class attendance is a signal of your commitment to the course. Your active participation in the class will be graded along the semester.

Please note you will NOT be penalized for absences due to sickness. Doctor note is not required if you feel sick and cannot come to class.

There is an asynchronous component for the online course. You need to read the assigned book chapter and cases before class and answer the discussion questions pre-assigned every week. The class participation is based on the pre-assigned questions. Please refer to "Course Preparation Question" file in the course syllabus section on BrightSpace for details.

### **Mid-term Exam (20%)**

A close book mid-term exam will be given to summarize the first half semester key learning objectives. More details will be announced before the mid-term exam.

### **OPTIONAL Case Presentation (20%):**

Students can organize team with no more than five people and volunteer to present the analysis of a selected case at the start of the class in which that case is to be discussed. Your presentation should be no more than 20 minutes in length plus discussion time. Please hand in your presentation slides with notes page to instructor in class. Make sure all group members' names and student IDs are provided on the first slide for grading purpose.

The students present cases do NOT need to participate in mid-term exam as your case presentation grade substitutes your mid-term grade. If you are interested in this opportunity, please contact me ASAP to reserve the spot.

#### Case Presentation Format

While each case will require a different emphasis, as a broad guideline you should include the following topics in your presentation:

- Executive summary (1 slide)
- Key issues (1 slide)
- Situation Analysis (SWOT) (1 slide)
- Conclusions from analysis (1 slide)
- Alternative courses of action (1-2 slides)
- Discussion of alternatives (1 slide)
- Comparison of alternatives (1 slide)
- Recommendations (1 slide)
- Implementation (1 slide)
- Key learning (1 slide)

#### Grading

You will receive feedback from the class and your instructor on your presentation.

In grading your assignment, I will ask the following questions:

- How carefully did you define the issues? Did you capture the essence of the case/topic?
- How thorough were your analyses?
- How relevant was your analyses to the problem at hand?
- Did you draw correct conclusions from your analyses?
- Did you systematically and thoroughly compare the alternatives?
- Were your recommendations appropriate?
- Were your implementation plans realistic?
- Did you see the bigger implications inherent in the case/topic?

For the case presentation, please note that, *unless otherwise stated* (there may be exceptions to this), you should assume that the information in the case is all that would be available to the decision maker at the time of the decision – i.e. conducting your own online research is unwarranted and may be distracting. For the topic presentation, please use book chapters as your guideline and feel free to search online to include any relevant information about the chosen company.

#### **Group/Individual Project (30%):**

You can choose to do either GROUP or INDIVIDUAL project report. Students choosing

to do GROUP project need to join a group of no more than FIVE people and are required to do an in-class presentation at the end of the semester and turn in one report per group to the project assignment dropbox.

Students choosing to do INDIVIDUAL report are NOT required to do presentation, but need to complete the whole report individually and submit report to the project assignment dropbox.

### Objectives

1. To conclude the course by applying the key tools and concepts you have learned.
2. To show that you have not just learned *about* the concepts in marketing principles, but that you can *work with* them in a real-world situation.
3. To show that you can exercise sound judgment in evaluating marketing opportunities/threats.

For the group project, you will research and analyze a brand/company and propose a new initiative for the brand/company. The new initiatives can be entering a new market/new customer segment, introducing a new product, or improving the brand's current practices to address certain issues, i.e., competitive threats. You are expected to submit a final course project report on the last day of class. You need to make sure to propose a new initiative that the company/brand has not yet conducted. Your report needs to add value to the company/brand existing practices.

### Report

You are expected to follow the sequence of course map to complete your report. A good format for this would be:

Background & New Initiative

The company and its strategy

New initiative you propose and rationale

SWOT Analysis

Segmentation, Targeting and

Positioning 4Ps analysis

Conclusions

Recommendations & Implementations of your new initiative(s)

Your grade of the final report will depend on:

- Did you exercise sound judgment in evaluating marketing opportunities/threats?
- How carefully did you define the issues/opportunities (i.e., new initiatives)? Did you capture the essence of the situation? Does the new initiative you propose make sense?
- Did you present your story in a compelling way?
- Did you develop an appropriate segmentation, targeting, and positioning strategy?
- Did you develop an actionable and meaningful marketing mix plan?
- Did you draw reasonable conclusions from your analysis?
- Were your recommendations appropriate?

Each group can register a unique product category and choose one specific brand from the



chosen category. Please note you cannot register the same category that has been chosen by the other group. The sign up is on a first come first serve basis.

The written assignment is due in the last week of class, and should be no more than 12 pages, 11 pt., 1.5 spacing with default margins. Please submit it in Microsoft Word on Course Space- Final Course Project Folder, using your last name and researched company as the filename, e.g. Shi\_Linda\_Costco.docx. Please make sure all group members put down names and student IDs on the cover page of your report.

**Final Exam (40%):** Final exam will be held at the end of the semester which will be an overall assessment of your understanding of marketing principles.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

<b>Percentage Range</b>	<b>Grades</b>	<b>Grade Point Value</b>	<b>Description</b>
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Note that it is required that you pass **60% in mid-term exam or case presentation** to pass the course. In the case that you do not attain a passing grade in any such component, it will result in a final course grade of Incomplete (N), with the maximum possible percentage grade of 49.

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

### **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### Schedule Summary:

	Topic	Type	Date	Description
1.1	Class Introduction	Lecture	01/09	Syllabus
1.2	What is Marketing?	Lecture	01/09	Chap. 1: Marketing
2.1	Marketing Environment	Lecture	01/16	Chap. 3: Marketing Environment
2.2	SWOT	Lecture	01/16	In-Class Handout
3.1	Sustainable Marketing	Lecture	01/23	Chap 16: Sustainable Marketing
3.2	SWOT and Sustainable Marketing	Case	01/23	<b><i>Case 1: Does Mattel's Iconic Barbie Doll Need a Makeover?</i></b>
4.1	Consumer Behavior	Lecture	01/30	Chap. 5: Consumer Behavior
4.2	Consumer Behavior	Case	01/30	<b><i>Case 2: Showrooming at Best Buy</i></b>
5.1	Segmentation, Targeting & Positioning	Lecture	02/06	Chap. 6: Market Segmenting, Targeting, and Positioning
5.2	Segmentation, Targeting & Positioning	Case	02/06	<b><i>Case 3: Graham's Pharmacy: Traditional Care, Modern Solutions</i></b>
5.3	Positioning	Lecture	02/13	<b><i>GUESTLECTURE (TBD)</i></b>
		Lecture	02/13	Chap. 6: Market Segmenting, Targeting, and Positioning
			02/20	<b><i>No Class Due to Reading Break</i></b>
			02/27	<b><i>Mid-term Exam</i></b>
6.1	Product & Services	Lecture	03/06	Chap. 7: Products and Services
6.2	Product & Services & Branding	Lecture	03/06	Chap. 7: Products and Services Chap. 7: Branding
7.1	Pricing	Lecture	03/13	Chap. 9: Pricing
7.2	Pricing	Case	03/13	<b><i>Case 4: Nestle's Maggi: Pricing and Repositioning a Recalled Product</i></b>
8.1	Channels	Lecture	03/20	Chap. 10 & 11: Marketing Channels & Retailing

8.2	Channels& Retailing	Case	03/20	<b><i>Case 5: Amazon Go: Venturing into Traditional Retail</i></b>
9.1	Communication & Promotion	Lecture	03/27	Chap. 12&13: Communicating Customer Value
9.2	Communication & Promotion	Case	03/27	<b><i>Case 6: East Coast Lifestyle: Expanding A Regional Apparel Brand</i></b>
10	Final Group Project		04/03	<b>Group project in-class presentation (Note: If you write individual report, you don't need to present in class.)</b>
	Final Exam	Exam	TBD	

The chapter sequence is based on textbook 7<sup>th</sup> edition.

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



## COM 290

### A01 Introduction to Canadian Business

#### Spring 2024 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.	
Course hours (PST)	Monday and Wednesday 4:30pm-5:50pm
Location	Clearihue Building C112
Instructor:	Ben Lukenchuk
Office:	BEC 222
Office hours:	In-person: Tuesday 3:30-4:30pm, Thursday 12:30-1:30, or by appointment. Zoom: By appointment. Please email me to set up a time. Please note that I am kindly requesting students turn their cameras on during Zoom meetings.
Email:	<a href="mailto:benluken@uvic.ca">benluken@uvic.ca</a>

***We acknowledge and respect the lək' wəŋen peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.***

#### **Introduction:**

Welcome! My name is Ben (he/him), and I will be your instructor for COM 290. I am a University of Victoria Economics alumnus but was born and raised in Calgary, AB. I went on to receive my Master of Arts in economics from McMaster University in Hamilton, ON and a Bachelor of Education from the University of Ottawa. Before joining GSB, I worked as an economist for the federal government with Environment and Climate Change Canada and at Finance Canada. My publications have been on public health issues. When not working and teaching, I enjoy beach walks with my wife, Rebecca, and Yorkshire Terrier, Hank, triathlon, and spin instructing. I am looking forward to getting to know you this semester!

#### **Texts and Resources:**

*Note: This course exclusively uses open and/or freely available resources.*

Belshaw, J.D. (2015). Canadian History: Pre-Confederation. Victoria, B.C.: BC campus. Retrieved from <https://opentextbc.ca/preconfederation/>.

Belshaw, J.D. (2016). Canadian History: Post-Confederation. Victoria, B.C.: BC campus. Retrieved from <https://opentextbc.ca/postconfederation/>.

Forsey, E.A. (2020). *How Canadians Govern Themselves*. [https://learn.parl.ca/staticfiles/Learn/assets/PDF/ParliamentaryPrimer/how\\_cdn\\_govern\\_the\\_mselves\\_10th\\_ed-e.pdf](https://learn.parl.ca/staticfiles/Learn/assets/PDF/ParliamentaryPrimer/how_cdn_govern_the_mselves_10th_ed-e.pdf)

Hutchinson, E. (2017). Principles of Microeconomics. Victoria, B.C.: BC campus. Retrieved from <https://pressbooks.bccampus.ca/uvicon103/>

Kymlicka, W. (2003). Being Canadian. *Government and Opposition* (London), 38(3), 357–385.  
<https://ezproxy.library.uvic.ca/login?url=https://www.jstor.org/stable/44483035>

### **Course Objectives and Description:**

This course introduces students to the cultural, economic, geographical, historical, legal, and political factors influencing the environment of doing business in Canada. Said another way, this course provides students with a background to examine the external factors that shape Canadian businesses and to analyze how these factors help or hinder businesses' ability to operate in their chosen industries.

The first part of this course covers the six 'episodes' of Canadian economic history from contact to the present. In addition, we explore the history of Indigenous peoples in Canada with a particular emphasis on the response to the Truth and Reconciliation Commission. The second part of this course covers a number of topics relevant to contemporary businesses. These topics include the political environment, central banking, environmental policy, social issues, and cultural identity. The course concludes with a discussion of current and emerging trends in the external environment for Canadian businesses.

### **Course Format:**

This course is designed for an in-person, face-to-face audience. Our class time is the most important element of the course. As such, attendance and participation will be assessed each day. Each class is centered around a lecture and slide deck though it is my expectation that this is just a jumping off point for a lively and engaging discussion where students are asking and answering questions. Some lectures will have more structured group work (such as group slides activities). The completion of this will count toward your participation grade.

There is a short, and very accessible, reading assignment that accompanies each lecture. More often than not, we will not explicitly analyze the reading. The reading assignment is none the less important background for understanding and engaging with the lecture. Please make best efforts to complete the readings before class. Though the emphasis of the term tests is on what is covered in lecture, the readings are examinable.

All the slide decks from lecture will be made available on Brightspace. My request is that the material be used only for your purposes as a student and that they are not posted externally (for example to Course Hero). Please note, that the slides are just an outline of what I will discuss in class. Without attending lecture, they are **NOT** sufficient to do well in the class.

Unless you have an accommodation need that has been discussed with me, I am kindly asking that students do not record our classes and lectures.

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

### **Evaluation Elements:**

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type	Due Date (m/d/yyyy hh:mm AM/PM)PST	Weight / % of grade	Description
COM 290: Attendance/ Participation	Individual	Other	Ongoing	10%	Attendance and participation will be Assessed each day. Students are expected to Engage with the material and actively participate with questions and comments. Small group participation exercises will occur during some classes.
COM 290: Term Test 1	Individual	Exam	02/14/2024 4:30pm	20%	Term Test 1 will be written in class and will consist of 50 multiple choice questions. It will cover the material from the lectures and assigned readings from the start of the course through to, and including, February 7. Emphasis will be placed on the material covered in lecture.
COM 290: Term Test 2	Individual	Exam	04/08/2024 4:30pm	15%	The format of Term Test 2 is identical to Term Test 1. There will be 50 multiple choice questions that will cover the material from the lectures and assigned readings from February 26 through to, and including, March 27. Emphasis will be placed on the material covered in lecture. Term Test 2 is <b>NOT</b> cumulative.
COM 290: Made in Canada Pitch	Group	Presentation	Either 03/25/2024 or 03/27/2024 4:30pm	25%	You will team up with four of your classmates for this assignment to deliver a 15-20 minute presentation with time for questions. Working together, you will take on the role of a Canadian trade delegation. Your objective is to pitch a foreign business to invest in Canada. A rubric will be provided along with detailed instructions.  Note: you <u>must</u> be present for all presentations in order to receive a grade for this assignment.

COM 290: Canadian Business/Industry Analysis (ThreePart)	Individual	Assignment	02/07/2024 & 02/28/2024 & 03/13/2024 11:59pm	30%	<p>You will be required to write three concise, one-page papers. Each paper will advance your analysis of a single Canadian business or industry. You can think of each paper as a section of what could be considered a mini- business report. A rubric will be provided along with detailed instructions.</p> <p>To encourage you to continue to learn and improve, the first paper is worth 5%, the second paper is worth 10%, and the final paper is worth 15%.</p>
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

### **Course Assessment:**

Canadian Business/Industry Analysis (Three Part): You will be required to write three concise, one-page papers. Each paper will advance your analysis of a single Canadian business or industry. You can think of each paper as a section of what could be considered a mini-business report. Over the course of the three papers, you will:

- identify and research a business/industry,
- review the history and external context of the industry,
- analyze the 'SWOT' of the business/industry, and
- propose a (high-level) solution to a business problem facing the business/industry.

The objective of this assignment is to get students to apply what they have learned to a new context while practicing the skill of writing clearly and concisely. A rubric will be provided along with detailed instructions. Early in the term, you will be asked to submit your proposed business/industry and four sources for approval.

Made in Canada Pitch: You will team up with four of your classmates for this assignment to deliver a 15-20 minute presentation with time for questions. Working together, you will take on the role of a



Canadian trade delegation. Your objective is to pitch a foreign business to invest in Canada. In the course of your presentation, you will answer the questions: to what extent could Canada's political, social, cultural, historical, and economic attributes help a foreign business succeed in its given industry? To what extent could these attributes hinder a business's ability to succeed? A rubric will be provided along with detailed instructions.

Note: you must be present for all presentations in order to receive a grade for this assignment.

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility.

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of 10% for each day an assignment is late. **As a general rule, however, late work will not be accepted without prior agreement with me.**

### Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, **ARE** permitted in this course for students who wish to use them. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI. Assignment guidelines will provide additional guidance as to how these tools might be part of your process for each assessment this semester and how to provide transparency about their use in your work.

### **Attendance and Participation:**

Regular attendance is an expectation for Gustavson School of Business courses. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

In this course, participation will count for 10% of your grade and will be assessed each day.

Students with unexcused absences\* will not be eligible for the attendance and participation points available for that day.

\*unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site.

Exceptions to the grading policy will only be considered for major extenuating circumstances, with permission from the Undergraduate Academic Director.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after). A self-declaration form – which can be found in the BrightSpace course site – should also be provided to your instructor when you do so.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that “A” grades are normally achieved by a minority of students.**

Percentage Range	Grade s	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Note that it is required that you pass **both** Term Test 1 and Term Test 2 to pass the course. In the case that you do not attain a passing grade in any such component, it will result in a Final course grade of Incomplete (N), with the maximum possible percentage grade of 49.

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

In Gustavson School of Business courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

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Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

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- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g., personal communication, ideas from a verbal presentation) without referencing the source.
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- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
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### **Schedule Summary:**

Title	Type	Due Date (m/d/yyyy hh:mm AM/PM)PST	Description
COM 290: Introductions and Course Outline	Reading	01/08/2024 4:30PM	READ: Course Outline
COM 290: Canada's Economic History – Episode 1: Colony	Reading Activity(x2)	01/10/2024 4:30PM	READ: Post-Confederation 8.2, 8.3; Pre-Confederation 6.3, 6.8, 9.7 READ (Optional): Principles of Microeconomics 2.2, 2.3, 4.9 COMPLETE: <i>Canada's Economic History</i> Module (part of Participation grade) COMPLETE: <i>Please Introduce Yourself!</i> Survey
COM290: Canada's Economic History – Episode 2: Pre-Confederation	Reading	01/15/2024 4:30PM	READ: Pre-Confederation 9.5, 9.8, 9.10, 10.3
COM290: Canada's Economic History – Episode 3: Confederation	Reading	01/17/2024 4:30PM	READ: Pre-Confederation 9.9, Post-Confederation 1.4, 2.3, 2.9

COM 290: Canada's Economic History – Episode4: Start of the 20 <sup>th</sup> Century	Reading	01/22/2024 4:30PM	READ: Post-Confederation 5.2, 5.4, 5.5, 5.8, 5.12
COM 290: Canada's Economic History – Episode 5: Canada at War	Reading	01/24/2024 4:30PM	READ: Post-Confederation 5.9, 6.3, 6.6, 6.10,6.14, 8.5, 8.6 COMPLETE: <i>Canadian Business/Industry Analysis Business Selection and Source Proposal</i> Module (part of participation grade)
COM 290: Canada's Economic History – Episode6: Post-WWII	Reading	01/29/2024 4:30PM	READ: Post-Confederation 5.11, 8.11, 8.16, 8.17
COM 290: Special Topics in Canadian History	Reading	01/31/2024 4:30PM	Topics will be based on class interest. Possible topics could includeQuebec Separatism or Hockey. READ: TBD
COM 290: Indigenous Peoples of Canada: Pre- Contact to Post-Truth and Reconciliation Commission (1)	Reading	02/05/2024 4:30PM	READ: Post-Confederation 11.4, 11.5, 11.6, 11.7, 11.8, 11.10, 11.11, 11.12 READ(optional): Pre-Confederation Chapter 2and 5
COM 290: Indigenous Peoples of Canada: Pre- Contact to Post-Truth and Reconciliation Commission (2)	Reading	02/07/2024 4:30PM	READ: As above
COM 290: Review for Term Test 1	Other	02/12/2024 4:30PM	COMPLETE: Please come with questions forthe review session.
COM 290: Term Test 1	Exam	02/14/2024 4:30PM	
Reading Break 02/19/2024-02/23/2024			
COM 290: Canada's Political Environment	Reading	02/26/2024 4:30PM	READ: How Canadians Govern Themselves: p.3-22; 32-40; 46 READ (optional): How Canadians Govern Themselves: p.24-31; 41-45
COM 290: Special Topics in Canadian Politics and Public Policy	Reading	02/28/2024 4:30PM	Topics will be based on class interest. Possible topics could include the History of the Right in Canada or Equalization. READ: TBD
COM 290: Central Banking and Environmental Policy	Reading	03/04/2024 4:30PM	READ: Principles of Microeconomics 5.3; <a href="#">How does the Bank of Canada work?</a> ; <a href="#">Bank of Canada - About Us</a> ; <a href="#">Understanding inflation targeting</a> READ (optional): <a href="#">Understanding how monetary policy works</a>
COM 290: British Colombia Legislature	Field Trip	03/06/2024 4:30PM	Attendance and completion of <i>BC Legislature Field Trip Module</i> will count towards your participation grade.
COM 290: Social and Cultural Issues in Canada	Video Activity(x3)	03/11/2024 4:30PM	COMPLETE: <i>Canadian TV Analysis</i> Module (part of Participation grade) COMPLETE: <i>BC Legislature Field Trip</i> Module (part of Participation grade) IN-CLASS: Group Slides Activity (part of Participation grade)
COM 290: Canadian(vs. American) Identity	Reading	03/13/2024 4:30PM	READ: <i>Being Canadian</i> 357–385. READ (optional): Post-Confederation 12.6

COM290: Current Business Issues	Reading Activity	03/18/2024 4:30PM	IN-CLASS: Group Slides Activity (part of Participation grade)  No readings. Please use the extra time to work on your presentations.
COM 290: Emerging Business Issues	Reading	03/20/2024 4:30PM	No readings. Please use the extra time to work on your presentations.
COM290:Madein Canada Pitch (1)	Group Presentations	03/25/2024 4:30PM	You must attend your colleagues' presentations in order to receive a mark for your presentation.
COM290:Madein Canada Pitch (2)	Group Presentations	03/27/2024 4:30PM	You must attend your colleagues' presentations in order to receive a mark for your presentation.
COM 290: Review for Term Test 2	Other	04/03/2024 4:30PM	COMPLETE: Please come with questions for the review session.
COM 290: Term Test 2	Exam	04/08/2024 4:30PM	

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

## COM 302

### The Legal Environment of Business (1.5 units) Section A01 (Course No. 20622) Course Outline (Winter/Spring 2024)

**Note:** Please check the COM 302 Brightspace and BCom Program sites frequently for updates and announcements.

COURSE HOURS	Tuesday & Thursday: 3:00 PM – 4:20 PM
LOCATION	DSB C118 <a href="https://www.uvic.ca/search/maps-buildings/buildings/david-strong.php">https://www.uvic.ca/search/maps-buildings/buildings/david-strong.php</a>
INSTRUCTOR	Kenneth Wm. Thornicroft, LLB/JD, PhD, Barrister & Solicitor Professor of Law & Employment Relations
OFFICE	BEC 206
OFFICE HOURS	Tuesday/Thursday: 1:00 – 3:00 PM ( <b>Note:</b> facemasks are mandatory)
TELEPHONE	250.721.6424 (Direct Office Line)
E-MAIL, BIO & WEBSITE	E-mail: <a href="mailto:kthornic@uvic.ca">kthornic@uvic.ca</a> <a href="http://www.uvic.ca/gustavson/faculty/faculty/faculty/current/thornicroftk.php">http://www.uvic.ca/gustavson/faculty/faculty/faculty/current/thornicroftk.php</a>

#### **Text & Course Materials**

1. Kenneth Thornicroft et al., *Canadian Business Law: A British Columbia Perspective*, Emond Publishing, 2020 – print or digital edition (“Text”).

**Note:** Please check the text “Updates” button for important information relating to the text

<https://emond.ca/Store/Books/Canadian-Business-Law-A-British-Columbia-Perspect?r=%2fStore%3fsearchtext%3dthornicroft%26searchmode%3danyword>

2. There will be other materials available on the course Brightspace site.

3. In addition, you may wish to visit the following websites:

- i) B.C. Superior Courts: [www.courts.gov.bc.ca](http://www.courts.gov.bc.ca)
- ii) B.C. Statutes and Regulations: [www.bclaws.ca](http://www.bclaws.ca)
- iii) Supreme Court of Canada: [www.scc-csc.ca](http://www.scc-csc.ca)

iv) Canadian Legal Information Institute: <https://www.canlii.org/en/index.php>

Note: You can link to a variety of relevant legal materials (such as the federal and provincial statutes, the Supreme Court of Canada, the Federal Court, the Federal Court of Appeal and other provincial superior courts) from the B.C. Courts' website.

Supplementary materials for each individual course module are posted in separate folders on the course Brightspace site.

### **Course Objectives & Description**

This course will introduce you to various legal concepts about which all managers should be knowledgeable. During your business career you will undoubtedly face many of the legal issues that are addressed in this course. This course will expose you to several topics including: the Canadian Legal System, Civil Dispute Resolution systems (including Alternative Dispute Resolution processes), Principal-Agent Relationships, Forms of Business Organization (Proprietorships, General Partnerships, Limited Liability Partnerships, Limited Partnerships, and Business Corporations), Directors' and Officers' Duties and Responsibilities, Tort Law (especially Negligence and Professional Liability), Fiduciary Relationships, Contract Law, Employment Law and Intellectual Property. Course components will include readings, cases, class discussion, experiential exercises and lectures.

Regular class attendance is essential if you expect to do well in this course. Equally essential is being prepared for class by ensuring that you have previously read/reviewed the material to be discussed so that you will be better able to understand the material discussed in each class session. Regular class attendance is an expectation within the Gustavson School of Business and being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance the learning environment. Being present in class exposes you to material not included in assigned readings, to your classmates' insights, and helps clarify material leading to better performance in the course.

### **Evaluation**

Students' performance will be evaluated based on the following course components:

A. First In-term Quiz	= 25%
B. Second and Third In-Term Quizzes @ 30% each	= 60%
C. Final Quiz	= 15%
<b>TOTAL</b>	<b>= 100%</b>

The quizzes will test your understanding of, and ability to apply, the various concepts covered in the course. Each quiz will focus on the material reviewed in the class sessions immediately preceding it. However, you should also note that, to a degree, the material covered later in the course builds on concepts previously reviewed. Accordingly, your ability to understand and apply concepts covered in later modules will depend, in part, on your mastery of concepts previously discussed.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

# Course Schedule and Reading Assignments (Winter/Spring 2024)

Date(s)	Topic and Reading Assignments
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**Week 1**

**Jan 9 & 11**

**Module No. 1: The Canadian Legal System**

Text: Ch 1

Constitutional Documents: Constitution Act, 1867 <https://canlii.ca/t/ldsw>; Constitution Act, 1982 (including the Canadian Charter of Rights and Freedoms) <https://canlii.ca/t/8q7l>

Cases: Constitution Act, 1867 – Federal & Provincial Jurisdiction

The Federal Trade & Commerce Power: *Reference re Securities Act* (2011, SCC) <https://canlii.ca/t/fpdwb> [see also: *Reference re Pan-Canadian Securities Regulation* (2018, SCC) <https://canlii.ca/t/hw0hz>]

Interprovincial Trade: *R v Comeau* (2018, SCC) <https://canlii.ca/t/hrkm6>

Environmental Regulation: *Reference re Environmental Management Act (British Columbia)*, (2019, BCCA) <https://canlii.ca/t/j0fsc>, appeal to SCC dismissed: *Reference re Environmental Management Act* <https://canlii.ca/t/j4rs7>; *References re Greenhouse Gas Pollution Pricing Act* (2021, SCC) <https://canlii.ca/t/jdwnw>; *Reference re Impact Assessment Act* (2023, SCC) <https://canlii.ca/t/k0l1g>

Telecommunications: *Rogers Communications v Châteauguay* (2016, SCC) <https://canlii.ca/t/gs3l3> [see also: *Calgary v Bell Canada* (2020, ABCA) <https://canlii.ca/t/j7v5b>]

Federal Criminal Law versus Provincial Property & Civil Rights/Local Matters: *Murray-Hall v Quebec (AG)* (2023, SCC) <https://canlii.ca/t/jwn0t>; *British Columbia (Director of Civil Forfeiture) v Angel Acres Recreation* (2023, BCCA) <https://canlii.ca/t/jvhms>, application for leave to appeal to SCC dismissed: <https://canlii.ca/t/k0k7z>

Superior versus Inferior Courts: *Reference re Code of Civil Procedure (Que)*, art 35 (2021, SCC) <https://canlii.ca/t/jgnxz>; *Trial Lawyers Association of British Columbia v British Columbia (AG)* (2022, BCCA) <https://canlii.ca/t/jp5bq>, application for leave to appeal to SCC dismissed: <https://canlii.ca/t/jtmsb>

Cases: Canadian Charter of Rights and Freedoms

Freedom of Expression: *Canada (AG) v JTI-Macdonald* (2007, SCC) <https://canlii.ca/t/1rvv2>; *Vann Niagara v Oakville* (2002, ONCA) <https://canlii.ca/t/1cttd>, appeal allowed: *Vann Niagara v Oakville* (2003, SCC) <https://canlii.ca/t/1grkb>

Freedom of Association: *Mounted Police Association of Ontario v Canada (AG)* (2015, SCC) <https://canlii.ca/t/gfxx8>



Freedom of Religion: *Law Society of British Columbia v Trinity Western University*, (2018, SCC) <https://canlii.ca/t/hsjpr>

Equality Rights: *Fraser v Canada (AG)* (2020, SCC) <https://canlii.ca/t/jb370>; *R v Kapp* (2008, SCC) <https://canlii.ca/t/1z476>

The Prof's Notes: *The Constitution Act, 1867*; The Constitutional Divide: Federal versus Provincial Jurisdiction; *The Constitution Act, 1982*; The Canadian Constitution: *Charter-ing a New Business Environment*

Exercise: *You Be the Judge!: Charter-ing a New Business Landscape*

Video: *The Road to Patriation* [https://www.nfb.ca/film/road\\_to\\_patriation/](https://www.nfb.ca/film/road_to_patriation/) (93 min)

## **Week 2**

**January 16 & 18**

## **Module No. 2: Resolving Business Disputes**

Text: Ch 2

Statutes: *Apology Act* <https://canlii.ca/t/52pn4>; *Arbitration Act* <https://canlii.ca/t/9q1f>; *Class Proceedings Act* <https://canlii.ca/t/84g6>; *Limitation Act* <https://canlii.ca/t/8qx3>; *Protection of Public Participation Act* <https://canlii.ca/t/96d3>

Cases:

Limitations: *Maracle v Travellers Indemnity* (1991, SCC) <https://canlii.ca/t/1fslb>; *Grant Thornton LLP v New Brunswick*, (2021, SCC) <https://canlii.ca/t/jh76f>

Releases: *Corner Brook (City) v Bailey* (2021, SCC) <https://canlii.ca/t/jh43g>

Choice of forum/Foreign actions: *Club Resorts Ltd v Van Breda* (2012, SCC) <https://canlii.ca/t/fqzt4>; *Chevron Corp v Yaiguaje* (2015, SCC) <https://canlii.ca/t/gkzns>; *Haaretz.com v. Goldhar* (2018, SCC) <https://canlii.ca/t/hsd2n>; *Nevsun Resources Ltd v Araya* (2020, SCC) <https://canlii.ca/t/j5k5j>

Class actions: *Pioneer Corp v Godfrey* (2019, SCC) <https://canlii.ca/t/j2hbf> [see also: Peter S. Spiro, "The Challenge of Recovering \$15 billion in the Quebec Tobacco Class Action" <https://canliiconnects.org/en/commentaries/65989>]

Summary civil proceedings: *Hryniak v Mauldin* (2014, SCC) <https://canlii.ca/t/g2s18>

Arbitration Provisions: *Seidel v TELUS* (2011, SCC) <https://canlii.ca/t/fkkkj>; *TELUS v Wellman* (2019, SCC) <https://canlii.ca/t/hzjnp>; *Uber v Heller* (2020, SCC) <https://canlii.ca/t/j8dvf>

"SLAPP suits": *1704604 Ontario v Pointes Protection Assn* (2020, SCC) <https://canlii.ca/t/j9kjz> [see also: *Hansman v Neufeld* (2023, SCC) <https://canlii.ca/t/jx8k0>]

The Prof's Notes: You're a Little Outside Your Jurisdiction; The Canadian Judicial System; Administrative Tribunals; Class Actions

### Videos:

The Provincial Court of BC (6.5 min) <https://vimeo.com/616230236>  
The BC Civil Resolution Tribunal (2 min) <https://civilresolutionbc.ca/>  
The Supreme Court of BC (3 min) <https://www.youtube.com/watch?v=8oB1tz9JqtM>  
The BC Court of Appeal (8 min) <https://www.youtube.com/watch?v=z0YgLOPrPJ8>  
The Supreme Court of Canada (6.5 min) <https://www.scc-csc.ca/court-cour/welcome-bienvenue-eng.aspx#video>  
Administrative Tribunals and Administrative Law  
<https://www.youtube.com/watch?v=2RwiOrYbBUA> (8.5 min)  
<https://www.youtube.com/watch?v=hkT3MTDBASA> (9 min)

### **Week 3**

**January 23**

### ***Module No. 3: Principal – Agent Relationships***

Text: Ch 7 (pp 248-253)

### Cases:

The agency relationship and the agent's authority: *Bure v The Queen* (1999, TCC) <https://canlii.ca/t/1c5d4>; *De Cotiis v Hothi* (2019, BCCA) <https://canlii.ca/t/j48tb>, application for leave to appeal to SCC dismissed: <https://canlii.ca/t/j8kd8>

Agency by estoppel: *Keddie v Canada Life Assurance* (1999, BCCA) <https://canlii.ca/t/1tkl4>; *Thiessen v Clarica Life Insurance* (2002, BCCA) <https://canlii.ca/t/5jd9>; *SystemCare Cleaning and Restoration v Kaehler* (2019, NSCA) <https://canlii.ca/t/hzqjw>

The agent's fiduciary duty: *Soulos v Korkontzilas* (1997, SCC) <https://canlii.ca/t/1fr25>

Principal and agent liability: *Asselstine v Manufacturers Life* (2005, BCCA) <https://canlii.ca/t/1kvjh>

The Prof's Notes: The Principles of Principal and Agent

### Exercise:

*You Be the Judge!*: Don't Call Me...Speak to my Agent!

**January 25**

**First Quiz (25%):** This quiz will cover the following modules: Canadian Legal System; Resolving Business Disputes; and Principal – Agent Relationships

### **Week 4**

**January 30**

### ***Module No. 4A: Forms of Business Organization – Sole Proprietorships***

Text: Ch 7; Ch 8 pp 262-274 and 277-288

Statute: *Partnership Act*, section 88 <https://www.canlii.org/en/bc/laws/stat/rsbc-1996-c-348/latest/rsbc-1996-c-348.html#sec88>

Case: *Security National Insurance v Markel Insurance* (2012, ONCA) <https://canlii.ca/t/ft4qb>

## **February 1                      Module No. 4B: Forms of Business Organization – Partnerships**

Text: Ch 7

Statute: *Partnership Act* <https://canlii.ca/t/53j97>

Cases:

Formation: *Blue Line Hockey Acquisition v Orca Bay Hockey Limited Partnership* (2009, BCCA) <https://canlii.ca/t/22b29>, app for leave to appeal to SCC dismissed: <https://canlii.ca/t/24qqz>

Partnership v Employment: *McCormick v Fasken Martineau* (2014, SCC) <https://canlii.ca/t/g6xlp>

Apparent Partnerships: *1062484 Ontario Inc v Williams McEnery* (2020, ONSC) <https://canlii.ca/t/j546x>, affirmed: *1062484 Ontario Inc v McEnery* (2021, ONCA) <https://canlii.ca/t/jdhcx>, application for leave to appeal to SCC dismissed: <https://canlii.ca/t/jhlh2> [but cf *Wallbridge v Brunning* (2018, ONCA) <https://canlii.ca/t/hrgdp>, application for leave to appeal to SCC dismissed: <https://canlii.ca/t/hx1cw>]

Limited Partnerships: *Harrison Hydro Project v BC(Environmental Appeal Board)* (2018, BCCA) <https://canlii.ca/t/hq5l0>, application for leave to appeal to SCC dismissed: <https://canlii.ca/t/ht92q>

## **Week 5 February 6                      Module No. 4C: Forms of Business Organizations – Corporations**

Text: Ch 7; Ch 8 pp 274-277

Statutes: *BC Business Corporations Act* <https://canlii.ca/t/84ld>; *Canada Business Corporations Act* <https://canlii.ca/t/7vf1>

Cases:

The “corporate veil”: *Yaiguaje v. Chevron Corporation* (2018, ONCA) <https://canlii.ca/t/hs4mz>, application for leave to appeal to SCC refused: <https://canlii.ca/t/hzjpr>; *Aubin v Petrone* (2020, ABCA) <https://canlii.ca/t/j4jw3>

Duties and liabilities of directors/officers: *Peoples Department Store v Wise* (2004, SCC) <https://canlii.ca/t/1j0wc>; *Ponce v Société d’investissements Rhéaume* (2023, SCC) <https://canlii.ca/t/k0ssk>; *Canada v Chriss* (2016, FCA) <https://canlii.ca/t/gtvrn>, application for leave to appeal to SCC dismissed: <https://canlii.ca/t/h2wzq>

The Oppression Remedy: *BCE Inc v 1976 Debenture holders* (2008, SCC) <https://canlii.ca/t/21xpk>; *Mennillo v Intramodal inc* (2016, SCC) <https://canlii.ca/t/gvp55>; *Wilson v Alharayeri* (2017, SCC) <https://canlii.ca/t/h4rzm>

Derivative actions: *Hercules Managements v Ernst & Young* (1997, SCC) <https://canlii.ca/t/1fr23>

Exercise: *Partnership & Shareholder Agreements*

**February 8**

**Module No. 5A: Tort Law – General Principles**

Text: Ch 3

Statutes: *Civil Rights Protection Act* <https://canlii.ca/t/84fz>; *Libel & Slander Act* <https://canlii.ca/t/845m>; *Occupiers Liability Act* <https://canlii.ca/t/51vby>; *Opioid Damages and Health Care Costs Recovery Act* <https://canlii.ca/t/9622>; *Privacy Act* <https://canlii.ca/t/jj79>; *Tobacco Damages and Health Care Costs Recovery Act* <https://canlii.ca/t/84kf>; *Trespass Act* <https://canlii.ca/t/95v2>

Cases:

Defamation: *Hill v Church of Scientology of Toronto* (1995, SCC) <https://canlii.ca/t/1frgn>; *Grant v Torstar Corp* (2009, SCC) <https://canlii.ca/t/27430>; *Crookes v Newton* (2011, SCC) <https://canlii.ca/t/fngpv>

Nuisance: *Antrim Truck Centre v Ontario* (2013, SCC) <https://canlii.ca/t/fwdn1>

Illegal conduct: *Hall v Hebert* (1993, SCC) <https://canlii.ca/t/1fs4g>; *British Columbia v Zastowny* (2008, SCC) <https://canlii.ca/t/1vmgv>

**Week 6**

**February 13**

**Module No. 5A: Tort Law – General Principles continued**

Text: Ch 3

Cases:

Multiple tortfeasors: *ICBC v Stanley Cup Rioters* (2016, BCSC) <https://canlii.ca/t/gs42c>

Recognizing novel tort actions: *Atlantic Lottery Corp v Babstock* (2020, SCC) <https://canlii.ca/t/j8tcb>

Aggravated and punitive damages: *Whiten v Pilot Insurance* (2002, SCC) <https://canlii.ca/t/51vn>

Exercise: *You be the judge!* – Name that tort!

**February 15**

**Second Quiz (30%):** This quiz will cover the following modules: Forms of Business Organization (Proprietorships, Partnerships & Business Corporations) and Tort Law (5A)

**Week 7**

**February 20 & 22**

**Reading Break – No Class Sessions**

## Week 8

February 27 & 29

### Module No. 5B: Tort Law – Negligence

Text: Ch 3

Statute: Negligence Act <https://canlii.ca/t/8487>

Cases:

Proving a Negligence Case: *Crocker v Sundance Northwest* (1988, SCC) <https://canlii.ca/t/1ftcw>

Foreseeability and causation: *Resurfice Corp v Hanke*, (2007, SCC) <https://canlii.ca/t/1qfl8>;

*Rankin (Rankin's Garage) v JJ* (2018, SCC) <https://canlii.ca/t/hrxsd>

Pure economic losses: *Deloitte & Touche v Livent Inc* (2017, SCC); <https://canlii.ca/t/hpdq9>;

*1688782 Ontario v Maple Leaf Foods* (2020, SCC) <https://canlii.ca/t/jbg4h>

Claims against governmental bodies: *Nelson (City) v Marchi* (2021, SCC) <https://canlii.ca/t/jjs98>;

*BC1178980 v British Columbia* (2023, BCSC) <https://canlii.ca/t/k05zb>; *Revelstoke (City) v*

*Gelowitz* (2023, BCCA) <https://canlii.ca/t/jwdkt>

The Prof's Notes: Proving a negligence claim

Exercises: *You be the judge!* Imposing a duty of care; *You be the judge!* – Assessing non-pecuniary damages; *You Be the Judge!* – Imposing a duty of care: “Am I my brother’s keeper?”

## Week 9

March 5 & 7

### Module No. 6: Contract Law – The Behavioural Elements

Text: Ch 5

Statutes: Electronic Transactions Act <https://canlii.ca/t/84kk>

Cases:

Offers and invitations to treat: *Roback v UBC* (2007, BCSC) <https://canlii.ca/t/1qsm1>; 2774880

*Manitoba Ltd v Superior Management* (2000, MBCA) <https://canlii.ca/t/1flbt>

The Postal Acceptance Rule: *Eastern Power v Azienda* (1999, OCA) <https://canlii.ca/t/1f9rb>

Acceptance by conduct: *Owners, Strata Plan LMS 3905 v Crystal Square Parking Corp* (2020, SCC) <https://canlii.ca/t/jb62z>

Tendering contracts: *MJB Enterprises v Defence Construction* (1999, SCC)

<https://canlii.ca/t/1fqp0>

Consideration: *Globex Foreign Exchange v Kelcher* (2011, ABCA) <https://canlii.ca/t/fmkz9>;

*Rosas v Toca* (2018, BCCA) <https://canlii.ca/t/hs3c5>; *Quach v. Mitrox Services Ltd.* (2020, BCCA) <https://canlii.ca/t/j4tb5>

Exercise: Yoube the judge! – The elements of a contract: Thanks for the consideration?

**Week 10**  
**March 12**

**Contract Law – The Contextual Elements**

Text: Ch 5

Statute: Age of Majority Act <https://canlii.ca/t/84gw>; Infants Act (Part 3) [https://www.canlii.org/en/bc/laws/stat/rsbc-1996-c-223/latest/rsbc-1996-c-223.html#Part\\_3\\_Infants\\_Contracts\\_20231](https://www.canlii.org/en/bc/laws/stat/rsbc-1996-c-223/latest/rsbc-1996-c-223.html#Part_3_Infants_Contracts_20231); Criminal Code, ss 347-347.1 [https://www.canlii.org/en/ca/laws/stat/rsc-1985-c-c-46/latest/rsc-1985-c-c-46.html?resultIndex=1#Criminal\\_Interest\\_Rate\\_1412854](https://www.canlii.org/en/ca/laws/stat/rsc-1985-c-c-46/latest/rsc-1985-c-c-46.html?resultIndex=1#Criminal_Interest_Rate_1412854)

Cases:

Parental waivers of infants' claims: *Wong v. Lok's Martial Arts Centre* (2009, BCSC) <https://canlii.ca/t/261kk>

Illegality: *Garland v Consumers' Gas* (2004, SCC) <https://canlii.ca/t/1gzjn>

Severance: *Transport North American v New Solutions* (2004, SCC) <https://canlii.ca/t/1gd53>

Contracts contrary to public policy: *Oldfield v Transamerica Life* (2002, SCC) <https://canlii.ca/t/1g2wk>

**March 14**

**Performance, Discharge & Breach, Remedies for Failure to Perform Contractual Obligations**

Text: Ch 4; Ch 8 pp 280-288

Statutes: Business Practices and Consumer Protection Act <https://canlii.ca/t/84mr>; Law and Equity Act, s 59 <https://www.canlii.org/en/bc/laws/stat/rsbc-1996-c-253/latest/rsbc-1996-c-253.html?resultIndex=1#sec59>

Cases:

The duty of good faith: *Bhasin v Hrynew* (2014, SCC) <https://canlii.ca/t/gf84s>; *CM Callow Inc v Zollinger* (2020, SCC) <https://canlii.ca/t/jc6vt>; *Wastech Services v Greater Vancouver Sewerage and Drainage District* (2021, SCC) <https://canlii.ca/t/jd1d6>

Rectification: *Performance Industries v Sylvan Lake Golf* (2002, SCC) <https://canlii.ca/t/51vq>

Exclusion of liability clauses: *Tercon Contractors v BC* (2010, SCC) <https://canlii.ca/t/27zz2>

Assessing Damages for Breach: *Hamilton v Open Window Bakery* (2004, SCC) <https://canlii.ca/t/1ggz8>

Specific Performance: *Southcott Estates v Toronto CSB* (2012, SCC) <https://canlii.ca/t/ft808>

Liquidated damages and “penalty” provisions: *Liu v Coal Harbour Properties* (2006, BCCA) <https://canlii.ca/t/1p6rq>

Damages for mental distress: *Fidler v Sun Life* (2006, SCC) <https://canlii.ca/t/1npv6>

Punitive Damages: *Whiten v Pilot Insurance* (2002, SCC), *supra* <https://canlii.ca/t/51vn>

The Prof's Notes: Utilizing the law of contract to manage legal risks; Legal risks in the manufacture and marketing of goods and services

Exercise: *You be the judge!* – Contracts: I'm sorry but you've been discharged...

## **Week 11**

**March 19**

**Third Quiz (30%)**: This quiz will cover the following modules:  
Negligence (5B) and Contract Law

**March 21**

**Module No. 7: Employment Contracts**

Text: Ch 9

Statutes: *Employment Standards Act* <https://canlii.ca/t/8405>; *Human Rights Code* <https://canlii.ca/t/843g>; *Labour Relations Code* <https://canlii.ca/t/844z>

Cases:

Employee versus independent contractor: *TCF Ventures v The Cambie Malone's Corporation* (2017, BCCA) <https://canlii.ca/t/h2qbg>

Discrimination under human rights legislation: *Stewart v Elk Valley Coal Corp.* (2017, SCC) <https://canlii.ca/t/h49b1>

Grievance arbitration and human rights law: *Northern Regional Health Authority v Horrocks* (2021, SCC) <https://canlii.ca/t/jtkc>

## **Week 12**

**March 26**

**Module No. 7: Employment Contracts continued**

Text: Ch 9

Cases:

Employee's duties: *RBC Dominion v Merrill Lynch* (2008, SCC) <https://canlii.ca/t/212w5>

Employer's good faith obligations: *Wallace v United Grain* (1997, SCC) <https://canlii.ca/t/1fqxh>; *Honda Canada v Keays* (2008, SCC) <https://canlii.ca/t/1z469>

Constructive dismissal: *Potter v NB Legal Aid Services* (2015, SCC) <https://canlii.ca/t/ggkhh>

Damages for wrongful dismissal: *Matthews v Ocean Nutrition* (2020, SCC) <https://canlii.ca/t/jb004>

Restrictive covenants: *Payette v Guay inc* (2013, SCC) <https://canlii.ca/t/g0jc8>



Exercise: You be the judge! – Termination of employment

**March 28**

**Module No. 8: The Creation & Protection of Intellectual Property**

Text: Ch 11

Statutes: Copyright Act <https://canlii.ca/t/7vdz> Trademarks Act <https://canlii.ca/t/7vlw>; Patent Act <https://canlii.ca/t/7vkn>

Cases:

The tort of passing off: *Ciba-Geigy Canada v Apotex* (1992, SCC) <https://canlii.ca/t/1fg4b>;  
*Vancouver Community College v Vancouver Career College* (2017, BCCA) <https://canlii.ca/t/gx49m>, app for leave to appeal to SCC dismissed: <https://canlii.ca/t/hpslj>

Confidential information: *Cadbury Schweppes v FBI Foods* (1999, SCC) <https://canlii.ca/t/1fqmw>

Copyright infringement: *CCH Canadian v Law Society of Upper Canada* (2004 SCC) <https://canlii.ca/t/1glp0>; *Cinar Corporation v Robinson* (2013, SCC) <https://canlii.ca/t/g2fgx>

**Week 13**

**April 2**

**Module No. 8: Intellectual Property continued**

Text: Ch 11

Cases:

Trademark infringement: *Mattel, Inc v. 3894207 Canada* (2006, SCC) <https://canlii.ca/t/1nfhl>;  
*Veuve Clicquot v Boutiques Cliquot* (2006, SCC) <https://canlii.ca/t/1nfhn>; *Masterpiece Inc v Alavida Lifestyles* (2011, SCC) <https://canlii.ca/t/flkff>

Trademark v patent protection: *Kirkbi v Ritvik Holdings* (2005, SCC) <https://canlii.ca/t/1m020>

The Patent “bargain”: *Teva Canada v Pfizer Canada* (2012, SCC) <https://canlii.ca/t/ftng9>

Patent utility: *AstraZeneca Canada v Apotex* (2017, SCC) <https://canlii.ca/t/h4knz>

Pre- and post-trial remedies: *Google v Equustek Solutions* (2017, SCC) <https://canlii.ca/t/h4ig2>;  
*Nova Chemicals v Dow Chemical* (2022, SCC) <https://canlii.ca/t/jt1w7>; *Burberry Limited v Ward* (2023 FC) <https://canlii.ca/t/k06bz>

The Prof's Notes: The value of information: Protecting intellectual property

Exercise: You be the judge! – Protecting your intellectual property

**April 4**

**Final Quiz (15%):** This quiz will cover the following modules:

Employment Contracts and Intellectual Property



## Policies & Other Important Information

### Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

### Requirements for Graded Work

Attendance: The University of Victoria Calendar states: “Students are expected to attend all classes in which they are enrolled.” Attending class is an important part of the learning process in this course. Attendance exposes you to material not in the readings, to your classmates' insights and helps clarify material that can lead to better performance in the course.

Your attendance will not be monitored; however, students are advised that material will be covered in class that is not addressed, or only briefly, in the course text. Accordingly, students who do not regularly attend class will be at a distinct disadvantage relative to students who regularly attend class.

### Grading Scale

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that “A” grades are normally achieved only by a minority of students.**

Percentage Range	Grades	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the Academic Director and may be subject to change up until that point.

In Gustavson School of Business courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

For more information on UVic grading policies see:

<https://www.uvic.ca/calendar/future/undergrad/index.php#/policy/S1AAgoGuV?bc=true&bcCurrent=14%20-%20Grading&bcGroup=Undergraduate%20Academic%20Regulations&bcltemType=policies>

### **Course Experience Survey**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to

<https://www.uvic.ca/learningandteaching/faculty/resources/ces/index.php> to complete the survey.

### **Academic Integrity**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- Paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g., personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.

- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

For more information on UVic's Academic Integrity policy see:

[https://www.uvic.ca/calendar/future/undergrad/index.php#/policy/Sk\\_0xsM\\_V?bc=true&bcCurrent=08%20](https://www.uvic.ca/calendar/future/undergrad/index.php#/policy/Sk_0xsM_V?bc=true&bcCurrent=08%20)

### **Centre for Accessible Learning**

Students have diverse learning styles and needs, and all qualified students are welcome in this course. If you have a *bona fide* disability or other health condition that may require accommodation, please contact the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available, by appointment, to assess your specific situation, provide appropriate referrals, and arrange appropriate academic accommodations. The sooner you bring your particular circumstances to our attention, the sooner we can provide you with the requisite accommodation.

### **Notice–Intellectual Property Rights**

The materials used in this course (electronic and paper) are the intellectual property of the instructor. Students must not share these materials without the instructor's express written consent, and must not otherwise sell, trade or transfer, or in any way profit, from the instructor's intellectual property. Individuals who infringe these intellectual property rights are subject to potentially significant monetary damages and, in addition, they will be sanctioned by the Gustavson School of Business (with penalties ranging up to and including expulsion from the GSB). Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behaviour](#) on the GSB website for details.



**Gustavson**  
School of Business  
University of Victoria

## COM 303

As the topic changes every year, there is no available course outline for this course.



## COM 316 (A01, A02, A03, A04, A05)

### Management Accounting Spring 2021 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

<b>COURSE HOURS</b>	<b>A01:</b> M & W 11:30 – 12:50 <b>A02:</b> M & W 8:30 – 9:50 <b>A03:</b> M & W 10:00 – 11:20 <b>A04:</b> M & W 3:00 – 4:20 <b>A05:</b> M & W 1:30 – 2:50
<b>SYNCH ZOOM CLASS</b>	<b>A01:</b> <a href="https://uvic.zoom.us/j/82500023653?pwd=eHZ5SHBTVldGTlFVeTRoVIRXY1Z2dz09">https://uvic.zoom.us/j/82500023653?pwd=eHZ5SHBTVldGTlFVeTRoVIRXY1Z2dz09</a> <b>A02:</b> <a href="https://uvic.zoom.us/j/81654610628?pwd=UFlwVmdTaitkK0g3cFYxZmhpRldldz09">https://uvic.zoom.us/j/81654610628?pwd=UFlwVmdTaitkK0g3cFYxZmhpRldldz09</a> <b>A03:</b> <a href="https://uvic.zoom.us/j/87241148892?pwd=NmZWczlxTmVYM0w3SDYyMk4yWXR0UT09">https://uvic.zoom.us/j/87241148892?pwd=NmZWczlxTmVYM0w3SDYyMk4yWXR0UT09</a> <b>A04:</b> <a href="https://uvic.zoom.us/j/81080094504?pwd=VVFqaDIBWGFrcnBhSIVYdXU4VVpSdz09">https://uvic.zoom.us/j/81080094504?pwd=VVFqaDIBWGFrcnBhSIVYdXU4VVpSdz09</a> <b>A05:</b> <a href="https://uvic.zoom.us/j/82766593506?pwd=MlVTVGkvZ2cxUDQxbGZpTzZXY21KQT09">https://uvic.zoom.us/j/82766593506?pwd=MlVTVGkvZ2cxUDQxbGZpTzZXY21KQT09</a>
<b>INSTRUCTOR</b>	Kimball Ketsa
<b>ZOOM OFFICE</b>	<b>A01, A02, A03, A04 &amp; A05:</b> <a href="https://uvic.zoom.us/j/88619936414?pwd=V0c3KzJ6elRQQmJaMG9TR1o1Z2VTZz09">https://uvic.zoom.us/j/88619936414?pwd=V0c3KzJ6elRQQmJaMG9TR1o1Z2VTZz09</a>
<b>OFFICE HOURS</b>	Mondays – second half of scheduled class or by appointment
<b>EMAIL</b>	kketsa@uvic.ca (best way to contact)

*We acknowledge with respect the Lekwungen-speaking peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.*

***UVic is committed to promoting, providing and protecting  
a supportive and safe learning and working environment for all its members.***

Online Orientation – All students registered in a class at the Gustavson School of Business are expected to complete our [online orientation course](#) on BrightSpace prior to attending class for the first time.

**Introduction:**

Kimball Ketsa - Welcome to COM316. I am a CPA, CMA accountant who has been practicing accounting for 24 years now in various industries that include public practice, a publically traded company, non-profit organizations, all levels of government that include municipal, provincial, federal, private industry as well as a consultant. I have held many positions up to the level of a CFO. I have also been teaching for 21 years mainly in a term capacity but have held full-time status for the past 3 years at UVIC. Most recently, I furthered my higher education studying education and have extensively developed my understanding of educational learning pedagogy through the MEd program at Simon Fraser University. My approach is to construct deep socio-cultural meaning of knowledge. I look forward to meeting you and transitioning my practical experience to you in a Zoom environment.

**Texts and Resources:**

**Required Text and CONNECT access code**

Managerial Accounting, Eleventh Canadian Edition with CONNECT, by Garrison, Libby, Webb, Noreen & Brewer. Published by McGraw-Hill Ryerson, 2018. ISBN-13: 9781260193770

**If you chose to purchase a used copy of the text:**

- It must be the 11<sup>th</sup> edition; the 10<sup>th</sup> edition is not acceptable.
- You will need to purchase the access code for CONNECT separately – check with the bookstore.

Rather than purchasing a hardcopy of the text, as above, you may purchase the e-book version [and access code](#) available through the bookstore online ISBN: 9781260193749.

**Course Objectives and Description:**

This course is an introduction to the fundamental concepts of management accounting. It complements the concepts covered in COM315 Financial Accounting, by focusing on the accounting functions internal to the organization. Management Accounting is concerned with the analysis and accounting for costs, management planning, controlling and decision-making. The course provides exposure to cost behaviour, variance analysis, short-run choice decisions and budgeting, as well as activity-based costing and activity-based management.

**The course objectives include:**

- Recognizing the importance of management accounting in an organization and how it is used within the context of the other functions of the company.
- Identifying the characteristics and behaviour of costs and the decisions that influence these costs.
- Using cost/volume/profit analysis, including calculating the break-even point and potential profit in a given situation.
- Identifying and applying different pricing methods.
- Recognizing where to use the various cost accounting systems.

- Calculating product costs and analyzing decisions that influence these costs, and interpreting them in a decision-making context.
- Recognizing the importance of activity-based costing in the evaluation of organizational performance.
- Applying concepts of budgeting and cash management.
- Identifying responsibility centers and various types of transfer prices.
- Determining and interpreting divisional performance (segment reporting).
- Using the “balanced scorecard” for decision-making and discussing different performance indicators.

### **Course Format:**

The principle method of instruction will include discussion of any questions arising from the chapter assigned readings on the relevant management accounting theory, combined with the analysis and discussion of problems and case analysis to further reinforce theory and practice. Students are expected to come to class having read the in-class work and assigned chapter readings.

Students are expected to be fully prepared for classes and active discussions, including completion of assigned cases. Developing a full understanding of the material is enhanced by completion of all assigned problems and students are strongly encouraged to do these, as a minimum. It may be helpful to meet with fellow students, after having attempted the problems/cases individually, to verify answers and work out any difficulties. Problems will be reviewed in class using a team approach to learning.

Connect assignments will provide questions, solutions and feedback which will allow students to practice concepts and technical aspects to aid in their learning.

The CONNECT online learning system (access code included with the text or e-book, or purchased separately) will be used to help you assess your preparation of course topics. **These questions are important practice, so you will definitely benefit from working through them.**

**A URL for the Connect learning system specific to your cohort will be posted on Brightspace. Registration in the correct section (cohort) is important**, to ensure your marks are tracked correctly.

- 1) **CONNECT:** The learning platform provides questions that can be done at any time. They are designed to reinforce the chapter content. Solutions are provided and you can do them over again with new numbers on each attempt. **Please note**, in addition, there are specific Connect assignments that are for marks (see below). These have specific deadlines (see the course schedule)
- 2) **LearnSmart CONNECT:** These are primarily theory-based questions that will allow you to test yourself on how well you have grasped the material. LearnSmart provides feedback and focuses on your individual areas of difficulty. It is highly recommended that you use LearnSmart as a study tool.

## **Educational Technology**

We use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: Connect. We will make you aware if this list changes. We use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at <https://www.mheducation.com/privacy.html>. We encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to us within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

## **Evaluation Elements:**

Students will be evaluated according to the following schedule:

<b>Title</b>	<b>Individual or Group</b>	<b>Type</b>	<b>Due Date</b>	<b>Weight (% of grade)</b>	<b>Description</b>
Participation/Contribution	Individual	On-line	On-going	15%	Based on attendance (5%), in-class reflections/contribution (5%) and submissions to discussion forums (5%).
CONNECT Assignments	Individual	Assignments	As per course schedule	50%	5 @ 10% each Best 5 out of 6
COM 316 Case Presentation	Group	Case	As per course schedule	30%	Report including an executive summary and Zoom presentation
KPMG simulation	Group	Simulation	March 23 and 24	5%	Based on achievement in simulation
Total				100%	

**Note: A minimum grade of C+ in COM 316 is expected in order to register for COM 426 (Management Accounting II).**

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may



choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Course Experience Survey:**

The BCom Program and its instructors value your feedback. As with all of our courses, you will be expected to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the Program make improvements.

Time will be set aside in one of the last synchronous sessions in the course for you to complete the online survey; you will need to use your UVic Netlink ID to access the survey, which can be done on your laptop, tablet or mobile device. As well, toward the end of the course, you will also receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey if you don't do so in the time provided in class.

### **Course Assessment:**

Description of evaluation standards for evaluation elements.

Group Work: The purpose of group work is to enhance your skill in working collaboratively. When a group-based assignment forms part of your evaluation for a grade, all members of the group will receive the same grade. Any exception to this policy, such as adjustments for relative contribution, will be specified in writing prior to the grading of the assignment.

Attendance and Participation: The University of Victoria Calendar states: "Students are expected to attend all classes in which they are enrolled." Attending and participating in an online synchronous session is an important part of the learning process in this course. Participation exposes you to material not in the readings, to your classmates' insights and helps clarify material that can lead to better performance in the course.

**Students with unexcused absences from more than 2 class sessions will have their grade reduced by 5%.** Students are generally expected to have their cameras on during synchronous sessions and during breakout room activities. Please inform the virtual classroom moderator if you are unable to have your camera on during a synchronous session. If you do not inform the moderator during the class, you may be considered absent.

To document an excused absence (illness, injury or family affliction), please submit the Gustavson self-declaration form to the BCom office ([bsscclerk@uvic.ca](mailto:bsscclerk@uvic.ca)). Appropriate documentation must be submitted immediately upon your return to classes (within 24 hours).

\*unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site.

## **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

<b>Percentage Range</b>	<b>Grade s</b>	<b>Grade Point Value</b>	<b>Description</b>
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
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“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

## **Academic Integrity:**

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Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.

- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### Schedule Summary:

In addition to the exercises, problems and cases assigned for Zoom discussions, CONNECT exercises and problems are examples of what we feel you need to do on your own, at a minimum, to ensure that you have grasped the material. The CONNECT system provides you the opportunity to try questions and then receive immediate feedback within the program. You can then re-try any questions that you had difficulty with. New numbers will be used each time you try, to help with your learning.

Dates	Class	Topic	Exercises, Problems & Cases	Pre-class Reading & Preparation	Assignments & Hand-ins
Jan 7		Introduction video of yourself...We would like to get to know each of you. Please send an introduction video by email to your professor prior to the start of class on Jan. 11, 2021			
Week 1 Jan 11	Day #1 (Jan 11)	Intro to the course and management accounting. Cost concepts and terms.	Exercise 1-1	Chapter 1	
	Day #2 (Jan 13)	Intro to Connect - McGraw Rep. visit Cost terms (cont'd). Cost classifications. COGS & COGM.	Exercise 2-9 Exercise 2-11 Exercise 2-10 Problem 2-25	Chapter 2 See pg. 42 for Cost of Goods Manufactured Schedule format	
Week 2 Jan 18		Cost estimation. CM income statement.	Exercises 3-4 Exercise 3-5 Problem 3-15	Chapter 3 (Exclude Appendix)	
		Mixed Costs and Pricing	Case 3-20 Class discussion	Prepare answers for questions at end of Case 3-20	
	Jan 20	Connect assignment available Wednesday at 5pm and due Sunday at 8pm.			
	Jan. 24 Sun.	Due by 8pm Sunday			CONNECT #1 Ch. 1 & 2
Week 3 Jan 25		Cost-Volume-Profit and Break Even Analysis	Exercise 4-13 Exercise 4-15 Exercise 4-11 Exercise 4-7	Chapter 4	
		CVP analysis (cont'd)	Miles away Corp. (from Brightspace).	Chapter 4	
	Jan. 27	Connect assignment available Wednesday at			

Dates	Class	Topic	Exercises, Problems & Cases	Pre-class Reading & Preparation	Assignments & Hand-ins
		5pm and due Sunday at 8pm.			
	<b>Jan 31 Sun.</b>	Due by 8pm Sunday			<b>CONNECT #2 Ch. 3 &amp; 4</b>
<b>Week 4 Feb 1</b>		Job Order Costing	Exercise 5-9 Exercise 5-14 Exercise 5-7 Problem 5-22	<b>Chapter 5</b> (Exclude bottom 161, 162-163; read Job Order Costing in Service Companies pg. 164)	
<b>Week 5 Feb 8</b>		Intro to Activity-Based Costing <b>Intro to Case Analysis.</b> <b>Case discussion</b>	Exercise 7-10 Exercise 7-11 Exercise 7-18	<b>Chapter 7</b> (Exclude Appendix)	
	<b>Feb 10</b>	Connect assignment available Wednesday at 5pm and due Sunday at 8pm.			
	<b>Feb 14 Sun</b>	Due before 8pm Sunday			<b>CONNECT #3 Ch. 5 &amp; 7</b>
<b>Week 6 Feb 15</b>	<b>Feb. 15-19</b>	Reading Week	No classes		
<b>Week 7 Feb 22</b>		Static Budgeting and Flexible Budgeting	Exercise 9-2 Exercise 9-9 Part 2 Exercise 9-18 Part 1	<b>Chapter 9</b>	
<b>Week 8 Mar 1</b>		Standard Costs and Variance Analysis	Exercise 10-9 Exercise 10-10 Exercise 10-13 Problem 10-20 (part 1, 2, 3 without the Volume variance, 4)	<b>Chapter 10 up to mid of Pg 408. Read Pg. 412-413</b>	
	<b>Mar 3</b>	Connect assignment available Wednesday at 5pm and due Sunday at 8pm.			
	<b>Mar 5 Friday</b>	Team cases posted on Brightspace			
	<b>Mar. 7 Sun.</b>	Due before 8pm Sunday			<b>CONNECT #4 Ch. 9 &amp; 10</b>
<b>Week 9 Mar 8</b>		Control and Responsibility Accounting. ROI and Residual Income.	Exercise 11-8 Problem 11-12	<b>Chapter 11</b> <b>Read appendix 11A – Transfer Pricing</b>  <b>Exclude pages 512-520</b>	
		Transfer pricing-appendix 11A	Exercise 11A-2	<b>Chapter 11</b> <b>Read appendix 11A – Transfer Pricing</b>	

Dates	Class	Topic	Exercises, Problems & Cases	Pre-class Reading & Preparation	Assignments & Hand-ins
		Balanced Scorecard. Simulation discussion.	Problem 11-24 Class discussion	<b>Exclude pages 512-520</b>	
	<b>March 10</b>	Connect assignment available Wednesday at 5pm and due Sunday at 8pm.			
	<b>March 14 Sun</b>	Due before 8pm Sunday			<b>CONNECT #5 Ch. 11</b>
<b>Week 10 Mar 15</b>		Management Decision Making: Differential analysis Joint costs –constraints	Ex 12-3 Ex 12-4 Ex 12-6 Ex 12-11 Ex 12-15	<b>Chapter 12</b> (Read Appendix 12A)	
<b>Week 11 Mar 22</b>		Pricing Decisions  Work on Team Case Presentations	Ex 12A-1(Pricing) Problem 12-25		
<b>Mar 23/24</b>		KPMG Simulation	No classes		
	<b>Mar 24</b>	Connect assignment available Wednesday at 5pm and due Sunday at 8pm.			
	<b>Mar. 28 Sun.</b>	Due before 8pm Sunday			<b>CONNECT #6 Ch. 12</b>
<b>Week 12 Mar 29</b>	<b>Monday@ 8am</b>	ALL CASE STUDY REPORTS AND POWERPOINTS DUE AND MUST BE SUBMITTED, NO EXCEPTIONS			
	<b>Monday</b>	Day #1 TEAM CASE PRESENTATIONS			
	<b>Wednesday</b>	Day #2 TEAM CASE PRESENTATIONS			
<b>Week 13 April 5</b>	<b>Day #24</b>	<b>NO CLASS –EASTER MONDAY</b>			
	<b>Wednesday</b>	Day #3 TEAM CASE PRESENTATIONS			
<b>Week 14 April 12</b>	<b>Monday</b>	<b>FINAL CLASS–Wrap up</b>			

**The above course schedule is provided as a guide to study and is subject to revision. Changes will be announced in class and posted on Brightspace.**

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



## COM 317 (A01)

### Managerial Accounting

#### Spring 2024 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.	
Course hours (PST)	Wednesdays 6:30 – 9:20 pm Pacific online
Location	Fully Online
Instructor:	Jennifer Reed, MEd, CPA, CA
Office:	Zoom Link
Office hours:	ZOOM Hours: By appointment over ZOOM
Email:	jereed@uvic.ca

***We acknowledge and respect the lək' wəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.***

#### **Introduction:**

My name is Jennifer Reed and I am excited to be your instructor this term. I graduated from the University of Victoria with a Bachelor of Science in Economics and after completing the Chartered Accountancy (CA) program, I obtained my Chartered Accountant (CA) designation in 2006. I recently completed a Master of Education degree with a focus on curriculum and instruction through Simon Fraser University in 2020.

I currently work as a Director for CPA Canada where my team is responsible for the design and delivery of accurate and high-quality Preparatory course and Professional Education Program (PEP) module materials designed to prepare candidates for successful careers as CPAs in Canada.

Prior to joining CPA Canada, I worked as an audit manager with KPMG working on a variety of both for-profit and not-for-profit audit clients. I also worked for three years as the Director of Finance for a local municipality, and as a Director for the legacy Chartered Accountancy School of Business in Western Canada.

My true passion is teaching, and I have taught financial accounting, audit and assurance and management accounting to students since 2010. I recognize that some of you may be taking this class out of interest, while others may be in attendance because of a program requirement. Regardless of your reason for being here, I hope that you come away from this course with a better understanding of the role that management accounting plays in the professional world.

Please do not hesitate to reach out to me for any questions or clarification as we progress through the term!

## **Texts and Resources:**

Garrison, Libby, Webb, Noreen & Brewer; **Managerial Accounting**; Twelfth Canadian Edition with CONNECT; McGraw-Hill Ryerson, 2021, ISBN: 978-1-26-019327-5

**Please note: Connect is a requirement of this course.**

If you choose to purchase a used copy of the text, please ensure that it is the 12<sup>th</sup> edition, and you will need to purchase the access code for Connect separately. Please check with the bookstore.

## **Course Objectives and Description:**

This course is an introduction to the fundamental concepts of management accounting. It complements the concepts covered in COM 202 Financial Accounting, by focusing on the accounting functions internal to the organization. Management Accounting is concerned with the analysis and accounting for costs, management planning, controlling and decision-making. The course provides exposure to cost behaviour, variance analysis, short-run choice decisions and budgeting, as well as activity-based costing and activity-based management.

The course learning objectives include:

- Recognizing the importance of management accounting in an organization and how it is used within the context of the other functions of the company.
- Identifying the characteristics and behaviour of costs and the decisions that influence these costs.
- Using cost/volume/profit analysis, including calculating the break-even point and potential profit in a given situation.
- Identifying and applying different pricing methods.
- Recognizing where to use the various cost accounting systems.
- Calculating product costs and analyzing decisions that influence these costs and interpreting them in a decision-making context.
- Recognizing the importance of activity-based costing in the evaluation of organizational performance.
- Applying concepts of budgeting and cash management.
- Identifying responsibility centers and segment reporting.
- Determining and interpreting divisional performance.
- Using the “balanced scorecard” for decision-making and discussing different performance indicators.

## **Course Format:**

This course will be delivered online using Zoom. It is recommended that you read the chapter as well as attend our weekly classes. Each class will be used to review the chapter content and work on problems related to the chapter being covered.

The principal method of instruction will include discussion of any questions arising from the relevant management accounting theory, combined with the analysis and discussion of problems worked on during class. Developing a full understanding of the material is enhanced by the completion of numerous problems and students are strongly encouraged to do as many as possible. Solutions will be posted on Brightspace.

The assignments will be completed using the McGraw Hill Connect platform. The assignments will provide questions, solutions and feedback which will allow students to practice concepts and technical aspects to aid in their learning.



## **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

## **Educational Technology**

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: Zoom, McGraw Hill Connect. I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at:

<https://zoom.us/privacy>

<https://www.mheducation.com/privacy.html>

I encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

## **Evaluation Elements:**

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type	Due Date PST	Weight / % of grade	Description
Participation/ Contribution	Individual	Online	Ongoing	5%	Based on assigned reflections, an end of term self-assessment and in-class participation.
Connect Assignments	Individual	Assignments	As per the course schedule	35%	Five assignments will be administered throughout the course. They will cover the current week or prior weeks' content.  Each assignment is worth 7%
Midterm	Individual	Online Timed Exam	Wednesday, February 28 at 6:30 pm PST	25%	Combined short answer and MCQ exam to be completed in 120 minutes via Brightspace
Final	Individual	Online Timed Exam	Per final exam schedule	35%	Combined short answer and MCQ exam to be completed in 120 minutes via Brightspace. <b>Exam written in person</b>
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

## **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

## **Course Assessment:**

Description of evaluation standards for evaluation elements.

Attendance and Participation: The University of Victoria Calendar states: "Students are expected to attend all classes in which they are enrolled." Attending and participating in class is an important part of the learning process in this course. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to

material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course.

The assessment of participation will be based on assigned reflections, an end of term self-assessment and in-class participation.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of 50% for each day an assignment is late. An assignment is considered late if it is submitted more than 30 minutes after the stated deadline.

This penalty does not apply to midterm exams, which are not accepted late for any reason whatsoever. If a student exceeds the time limit specified for a midterm exam beyond the 1-minute grace period, a grade of zero will automatically be assigned.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g. illness) which interfere with their academic obligations.

#### Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. In this course, the use of AI tools including ChatGPT is not permitted on take-home assignments or assessments.

### **Attendance and Participation:**

Regular attendance is an expectation for Gustavson School of Business courses. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course.

While attendance is a pre-requisite for participation, I understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, I encourage you to stay home when you are sick, taking care of yourself and protecting others. You may also choose to miss class for a job interview, home responsibilities, or a host of other reasons.

To accommodate the possibility of such occasional absences during the term, I will accept up to 2 missed classes without penalty.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grade s	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	

65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

## **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

## **Schedule Summary:**

**IMPORTANT: Subject to change- refer to Brightspace weeklycontent**

Week	Date	Topics	Details
1	Wednesday, January 10	Managerial Accounting and the Business Environment	Read: Chapter 1
2	Wednesday, January 17	Cost Terms, Concepts and Classifications	Read: Chapter 2
3	Wednesday, January 24	Cost Behaviour: Analysis and Use	Read: Chapter 3(exclude Appendix)
		Connect Assignment 1worth 7%	Available until Sunday, January 28 at 11:55 PM (PDT)
4	Wednesday, January 31	Cost-Volume-Profit Relationships	Read: Chapter 4(exclude Appendix)
		Reflection #1	Due Sunday, February 4 at 11:55 PM Pacific
5	Wednesday, February 7	Systems Design: Job-Order Costing	Read: Chapter 5
		Connect Assignment 2worth 7%	Available until Sunday, February 11 at 11:55 PM (PDT)
6	Wednesday, February 14	Activity Based Costing: A Tool to Aid Decision Making	Read: Chapter 7(exclude Appendix)
		Connect Assignment 3 worth 7%	Available until Sunday, February 18 at 11:55 PM (PDT)
7	Wednesday, February 21	<b>Reading Break</b>	<b>Course to date cumulative mid-term. Start time is 6:30 pm Pacific. Estimated time of 120 minutes.</b>
8	Wednesday, February 28	<b>Midterm</b>	
9	Wednesday, March 6	Variable Costing: A Tool to Aid Decision Making	
		Reflection #2	Due Sunday, March 10 at 11:55 PM Pacific
10	Wednesday, March 13	Budgeting	Read: Chapter 9(exclude Appendix)
11	Wednesday, March 20	Reporting for Control	Read: Chapter 11 (exclude Appendix)
		Connect Assignment 4 worth 7%	Available until Sunday, March 24 at 11:55 PM (PDT)
12	Wednesday, March 27	Relevant Costs for Decision Making	Read: Chapter 12(exclude Appendix)
		Reflection #3	Due Sunday, March 31 at 11:55 PM Pacific
13	Wednesday, April 3	Capital Budgeting Decisions	Read: Chapter 13(exclude Appendix)
		Connect Assignment 5 worth 7%	Available until Sunday, April 7 at 11:55 PM (PDT)

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



## COM 322

### Leading People and Organizations II Spring 2023 Course Outline

Please check your course and program sites frequently for updates and course changes.

Course hours and location:	Tuesday and Thursday ✚ 8:30 am - 9:50 am   Section A01 (CRN 20651)   C112 ✚ 10:00 am - 11:20 am   Section A02 (CRN 20652)   C116 ✚ 11:30 am - 12:50 pm   Section A03 (CRN 20653)   C122 ✚ 3:00 pm - 4:20 pm   Section A04 (CRN 20654)   C116 ✚ 4:30 pm - 5:50 pm   Section A05 (CRN 20655)   C122		
Dates:	January 10 to February 16, 2023   Prof. Dr. François Bastien February 28 to April 6, 2023   Prof. Brian Leacock		
Instructor:	François Bastien	Brian Leacock	Aminat Muibi (TA)
Office:	BEC 474	BEC 272	
Office hours:	By appointment on Zoom <a href="https://uvic.zoom.us/j/8044641289">https://uvic.zoom.us/j/8044641289</a> <a href="https://uvic.zoom.us/j/48465?pwd=WVhOZzV0dHdLNmp0VTcr4199?pwd=WTc2KzN2ZzNY">https://uvic.zoom.us/j/48465?pwd=WVhOZzV0dHdLNmp0VTcr4199?pwd=WTc2KzN2ZzNY</a> <a href="https://uvic.zoom.us/j/8044641289?pwd=WTc2KzN2ZzNY">S0ViWDdNQOT09</a> <a href="https://uvic.zoom.us/j/48465?pwd=WTc2KzN2ZzNY">OVM3K3BQSTBNUFVZz0</a>		
Email:	<a href="mailto:fbastien@uvic.ca">fbastien@uvic.ca</a>	<a href="mailto:bleacock@uvic.ca">bleacock@uvic.ca</a>	<a href="mailto:aminatmuibi@uvic.ca">aminatmuibi@uvic.ca</a>

**We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the University of Victoria stands, and the Songhees, Esquimalt and W̱SÁNEĆ peoples whose historical relationships with the land continue to this day. In this course, you will have a unique opportunity with a dedicated class on Indigenous perspectives: Decolonization, Indigenization and Reconciliation.**

***UVic is committed to promoting, providing and protecting  
a supportive and safe learning and working environment for all its members.***

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, we intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community.

Please let us know if we can do better to support your rights in our classroom. We will also do our best to listen and respond compassionately if you want to share with us how we can be a better ally.

### **Texts and Resources:**



**Required text:**

Daft, R. L., & Armstrong, A. (2021). *Organization Theory & Design (Fourth Canadian Edition)*. Toronto, Ontario: Cengage Canada.

**Required readings:**

LPOII will make use of articles that are available free from Business Source Complete (UVic Library). Please note, as confirmed by our librarian, scanned versions of the Harvard Business Review (HBR) articles can be posted to Brightspace to a limit of one article per issue. When scanned versions are available, we will post accordingly.

**Additional readings and cases:**

Additional class readings will be available on Brightspace, UVic Summon (Business Source Complete), or online. LPOII may also utilize several business cases, which are available online from Ivey for a nominal fee. We expect that each student will individually purchase the business cases as the materials are copyrighted.

*Please note that we may add readings to individual classes throughout the term – it is up to you to make sure that you check Brightspace ahead of time to ensure that you are up to date with reading requirements.*

## **Course Objectives and Description:**

This course explores how to understand, foster, and lead organizations in which people excel. A core component is the underlying assumption that there are many types of organizations and that organizational excellence depends, in part, on identifying the right fit between people, the organizational design, and the external environment. COM 322 (LPOII) builds on COM 321 (LPOI) by examining the organizational level of analysis and provides you with a basis for understanding and critically examining complex organizations in contemporary society. On the learning journey, Prof. Dr. Bastien and Prof. Leacock will guide an examination of the interrelationships among the social, cultural, and formal properties of organizations. They will emphasize the analysis of organizational systems for improving integration, adaptation, survival, and effectiveness of organizations, as well as link to the contextual forces in the external environment.

Organization theory is the study of how an organization operates as a collective social system within its environment. Organizations are an integral part of our everyday lives. We work for them, belong to them, help develop them, curse at them, and cannot get along without them. As organizations play such a central role in each of our lives, a better understanding of organizations will help you become more successful as managers and leaders. After all, why do organizations look the way they do? Why do organizations behave the way they do? What roles do an organization's internal characteristics (e.g., its structure, its size, its culture, etc.) and external environment (e.g., its competitors, investors, the government, technological changes, etc.) play in these processes? How do organizations influence society – and vice versa?

In this course, we will explore a range of theories and perspectives that explain the structure and behavior of individual organizations, the relationships between multiple organizations, and the properties of entire populations of organizations.

Upon completing *Leading People and Organizations II*, you will be successful in the pursuit of the following aspirations:

- ✚ Understanding the nature of complex organizations and how they function
- ✚ Applying multiple theoretical perspectives of organizations to diagnose and solve organizational and managerial problems
- ✚ Communicating and discussing your thoughts about organizations and organization theory
- ✚ Critically thinking and writing about the reality, problems, and solutions of organized human activity

After you finish *both Leading People and Organizations I and II*, you will be more successful at the following:

- ✚ Using your understanding of human behaviour to improve organizational outcomes

- ✚ Understanding and navigating your role and unique capacity within organizations
- ✚ Working effectively in high-performing teams in modern organizations
- ✚ Identifying values underpinning different leadership styles in organizational cultures
- ✚ Managing complex processes, such as leading change, in organizations
- ✚ Recognizing implications for organizations operating in a global business environment
- ✚ Integrating organizational level concepts in sustainable business

### **Course Format:**

LPOII has the potential to be an important part of your development as a successful businessperson, but it requires you to commit to the learning process.

To achieve our objectives in this course, we will learn about a variety of topics and will do so by using a range of techniques. These techniques include, but are not limited to, reading assigned materials, analyzing cases, performing in-class activities, discussing current events, watching videos, and participating in lectures. Prior to each class, we expect all students to have read and reflected upon the assigned readings. Most sessions combine the assigned textbook chapter(s) with additional reading materials, and hence, preparation and attendance are critical.

Please refer to the class schedule for specifics on required readings. Please note that all materials covered in this course, including supplemental material, lectures, discussions (both in-class and on the discussion board), and case examples are testable and may appear on the LPOII exams.

#### *Guidelines for Individual and Team in Class Contributions*

In order to make this course a positive learning experience for both yourself as well as your peers, we expect you to come to class with the following guidelines in mind:

- ✚ Complete readings *before* class and use those readings as a basis for your active participation during in-class activities, discussions, and individual and group assignments. Developmental, theory-based comments are valuable for moving the discussion forward.
- ✚ Ask questions that add to your understanding of the course material as well as the knowledge base of your classmates. Encourage your classmates to get involved. Avoid repeating what has already been said.
- ✚ Be considerate – come to class on time and do not leave early. Please do not interrupt or engage in private conversations while others are speaking.
- ✚ Share your opinion *and* be prepared to reconsider it. Respect others' rights to hold opinions and beliefs that are different from your own, recognizing that there are many different ways to view the material.
- ✚ Allow everyone the chance to talk. If you have much to say, try to hold back so that your peers might have an opportunity to participate. If you are hesitant, look for opportunities to contribute.

### **What You Can Expect from Us**

- ✚ We are committed to making this course a valuable learning experience for you. It will be both rewarding as well as challenging.
- ✚ We are here to help you succeed so we are available to help via email and by appointment. For email, please include 'LPOII' or 'COM 322' at the beginning of your subject headline, followed by the subject of your email. Before you send us an email, please check the course syllabus, notes, with your classmates and on Brightspace for the answer to your question. We will respond to emails in a timely manner (within 24 hours, excluding weekends). For your more detailed or complicated questions, please arrange for an appointment.

- ✚ We will upload relevant course materials, including the lecture slide decks, to Brightspace.
- ✚ We will give and receive feedback. Please feel free to offer constructive feedback about your experiences with the course, to help us make it as valuable a learning experience as possible.

### **Educational Technology:**

We use a variety of educational technology in this course, including internet-based technologies or web-based applications, cloud services, and social media. The use of technology is part of your engagement at the University of Victoria (UVic).

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual, for example, your name or your email address.

The following educational technologies, which store or access your personal information outside Canada, are required for this course: Zoom, MS Teams, Youtube, HBR, and Mentimeter. We will make you aware if this list changes. We use these technologies to enhance your educational experience at UVic. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at [Zoom](#), [MS Teams](#), [Youtube](#), [HBR](#), and [Mentimeter](#). We encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to us within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

### **Evaluation Elements:**

Students will be evaluated according to the following schedule:

2023 Schedule	Individual or Team	Type	Due Date	Weight % of grade
Participation	Individual	Positive participation	Ongoing throughout term	10%
Assignments	Team	▪ Thought assignment by Prof. Dr. François Bastien (15%)	February 7	30%
		▪ Mini assignment by Prof. Brian Leacock (15%)	March 14	
Midterm exam	Individual	Midterm exam details to follow	February 13-17	25%
Final project	Team	International Expansion Proposal (Japan 2023) ▪ Extensive explanation provided in class	Report on March 28	35%
			Presentations on March 30, April 4, April 6	
Total				100%

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials, and the grading rubric for the assignment. Note that we may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Course Experience Survey:**

The BCom Program and its instructors value your feedback. As with all of our courses, you will have the opportunity to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to us regarding the course and our teaching, as well as to help the program make improvements.

### **Requirements for Graded Work:**

- 1) **Midterm Exam:** There is one exam, which will examine your knowledge and understanding of the textbook, supplemental readings, and in-class materials. The format of the exams may combine multiple-choice and true-false questions with short essay and applied essay or case questions. The midterm exam will cover materials from the first eleven classes and is worth 25% of your course grade. If you miss the midterm exam, you will receive a grade of zero unless you notify us ahead of time and have a legitimate, documented excuse (i.e., illness, accident, or family emergency only). The midterm exam is open-book and will be written on Brightspace.
- 2) **Assignments:** Each team is required to submit two assignments on the designated due dates of February 7 and March 14.

The **thought assignment** is a short (about 4 to 5 pages, double spaced, typed) demonstration of a team's capacity to work with and think creatively about concepts from the course, independent of thoughts already presented or introduced by the instructor or the readings. However, ideas presented in class or in the readings may be points of departure for your thought assignments. Students are also encouraged to relate concepts from this course to concepts from other courses.

A thought assignment may take one of the following forms, or genres:

1. Exploration of the logical consequences of an idea
2. Debate and attempts to reconcile two apparently discordant ideas
3. Application of ideas in the context of world/local events, a specific organization, or public policy

Some thought assignments raise questions; others attempt to provide answers or, at least, propositions. Some thought assignments deliberately reveal personal values, emotions, and beliefs while others are more objective and less personal. Good thought assignments are analytic – seeking to explore or explain phenomena, poor thought assignments tend to be merely descriptive. Good thought assignments are also unique and creative; they do not merely rehash, repackage, or summarize what we covered in the readings or prior class discussions.

In short, the critical element about thought assignments is that they must be original expressions and demonstrations that students have gone beyond the materials presented by the course content and has done something creative and original with that content. We assume that each assignment, when it is submitted, is an expression of a team's creativity and insight. Ideas that are not those of the author/student must be professionally referenced in a consistent manner so that credit can accrue to the original sources involved.

The **mini assignment** is an opportunity for your team to directly apply your learning from the course by crafting a visual narrative of a single company. In this project, your team will explore the various dimensions of a firm anchored in organizational theory covered in the lectures, textbook, and assigned readings.

## Process

Identify a company of choice and explore a range of aspects of the firm anchored to concepts from the textbook, readings, and lectures. The firm can be from any industry but it is advisable to consider a company that you are familiar with and even have direct contacts in. Due to the complexity of large organizations (like Boeing/Amazon) you are best advised to select a smaller company (such as Level Ground Trading/GAP Tours). SMEs are optimal.

The following list might help you in the selection process:

- <https://www.canadastop100.com/sme/>
- <https://www.canadastop100.com/bc/>
- <https://www.canadastop100.com/alberta/>

If your team has the capacity, a company outside Canada is also welcome!

- Select a company
- Research the company in detail
- Research the industry using IBISWorld and/or Statista
- Craft a visual representation of the various aspects of the company
- Hand write (on the last page of your project) a bibliography of sources

Your grade is based on both the visual (aesthetic) quality, as well as the depth of analysis/insight. Focus on diagrams and please use your words precisely!

## Supplies

- Maruman MNEMOSYNE Notebook 9.06x 5.83 (Vertical A5) - required
- Scotch tape double sided (if including any printed visuals) - recommended
- Pilot FriXion Point Clicker 0.5mm, Erasable Gel Needle Pens - recommended

## Grading

This assignment must be completed as a team and reflect depth of analysis with a high quality visual narrative. This creative approach will allow for a significant degree of flexibility but must reflect the content of the course. An APA citation list (hand written) should be included on the last page of the project.

As this is a team project, you will also be required to complete a team participation form that may influence your respective individual marks. A teammate who is often absent from class, doesn't complete the readings, or fully engage in team meetings will be unable to contribute equally – resulting in a possible grade reduction. (As assessed by the professor.)

If your visual narrative is restricted to just textbook concepts you will secure a mid-range grade. For first class grades (A range) you will need to step beyond the textbook and include relevant concepts introduced by Dr. François Bastien, such as the Indigenous world view of relatedness of space and time. (See your notes for January 31 and think back to the session in the First Peoples House for examples.) You may also select one or two visual diagrams from other courses such as Com 361 (IB), Com 362 (Sustainability) and beyond your core studies (such as the 7S model for alignment). Finally, you may also challenge the models, the socially constructed logic, and even suggest a new model (or two).

## Notes from Lectures (to be explained in further detail in class)

- All elements are related
- Alignment of the parts of the organization
- Consider the external environment and alignment
- Shed light on the complexity of an organization but don't strive to use all the models
- Be critical and explore deeper – not just report out
- Be nuanced in your exploration

- You can use the same company as your thought assignment but not as your final international expansion proposal
- Thought Assignment (written analysis), Visual Narrative (visualization), International Expansion proposal (combine written analysis and visual narrative + dynamic presentation)

- 3) **International Expansion Proposal:** Teams will choose a company and propose expanding its operations to a pre-determined country (Japan 2023), where that company currently does not have any part of its value chain. You will create a proposal for an integrated and aligned organization within the new country context (Japan 2023) using concepts studied in the course. In addition to Com 322 course materials you may want to consider components covered in your Com 321 (LPO1), Com 361 (IB with focus on the socio-cultural environment), and Com 362 (sustainability). Your team will have to agree on how you will conduct your analysis and write up your findings. Please be thorough, cite your sources, and use this as an excellent opportunity to learn about designing and changing an organization, as well as leading in an international context. The paper proposal (written by the whole team) will be no more than 5000 words of text. Title page, table of contents, appendices, and references will not count towards the total word count. Please be compelling in your limited space and please use a variety of sources for your paper: industry and government reports, company websites, Daft textbook, HBR/academic articles, databases, interviews with professors or industry experts, insights from people you know or those who know a lot about the target country. It is also recommended that you specifically access the Statista database (via UVic libraries) as this is a powerful tool for this assignment. Please make sure that your paper includes appropriate references.
- 4) **Class Attendance, Engagement and Positive Participation:** Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Core year experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Participation contribution is worth 10% of your course grade. Participation exposes you to material not in the readings, to your classmates' insights and helps clarify material that can lead to better performance in the course. It represents how much – and how well – you support your classmates' learning. More specifically, this course emphasizes discussion and exercises, and hence you share responsibility for the learning that takes place. Success is partly dependent on your preparedness for participation and the contribution your participation makes to our activities. Thus, you should ensure that you are in a position to discuss assigned readings in class and/or engage constructively in case analysis. We will keep an on-going record of your participation during the term based on our observation of the quantity and, in particular, the quality of your contributions.

For those students who are less comfortable speaking in front of the class, you should take this opportunity to improve your skills and participate. However, we will also provide an additional outlet for demonstrating contribution by participating in the discussion post-hoc by posting comments on the discussion board on Brightspace. Following each class, all students will have until the next day to post additional contributions to any discussions or debates we have had in class, or otherwise share information with the class that is pertinent to the previous day's topic. Only contributions made within 24 hours of our class time will be considered valid for credit toward participation contribution.

Evaluation of your class participation will be based on the following criteria:

- Raising and answering questions
- Sharing ideas, insights, and feelings
- Sharing personal experiences and observations
- Sharing relevant examples from industry and practice
- Relating and synthesizing ideas of others
- Providing constructive feedback on the learning climate and processes in the classroom
- Helping others develop their views and ideas
- Pointing out relationships to earlier discussions

While attendance is a pre-requisite for participation, we understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, we encourage you to stay home when you are sick, taking care of yourself and protecting others. If you are missing class on a given day due to illness, injury or family affliction, please document this by submitting the Gustavson self-declaration form to the BCom office (bcom@uvic.ca). Appropriate documentation must be submitted immediately upon your return to classes (within 24 hours). Absences supported by a self-declaration form will be considered excused and will not count against your participation grade. However, absences not supported by a self-declaration form will be considered unexcused. Attending class is always your choice. You may choose to miss class for a job interview, home responsibilities, work-life flexibility or a host of other reasons. However, because your absence negatively affects your intrinsic learning, as well as your teammates and the overall classroom environment, more than three unexcused absences will have consequences. If you choose to have more than three unexcused absences, your participation grade will be jeopardized.

\*Unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site.

In addition, your participation mark will also take into account your completed content and logins on the course shell in Brightspace, as well as discussions board reads. This course requires commitment and engagement. These are key success factors.

**Missed coursework or assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.

**Assignments are due on the date scheduled:** As in the business world, work must be received on time to matter. To be fair to all the students who submit on time, if you are late on an assignment, your grade on that assignment will be reduced by 10% for each day it is late.

The Gustavson School of Business guidelines for written work require the use of the APA style for citations. For help please refer to the APA style guide on UVic Library website.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grade	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding, and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	



77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed, or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

### **Academic Integrity:**

As our programs help to create business and government leaders, the Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### **Course Schedule:**

Date		Title	Read/Watch the following before class
Week 1	Jan. 10 Tuesday (1)	<b>Course Introduction</b>	<b>Reading</b> <ul style="list-style-type: none"> <li>▪ Course outline</li> </ul>
	Jan. 12 Thursday (2) *Noclass		Workplace Skills Conference scheduled on Jan 12 and 13  No Class
Week 2	Jan. 17 Tuesday (3)	<b>P1: Introduction to Organizations and their Environments</b>	<b>Reading</b> <ul style="list-style-type: none"> <li>▪ <b>Chapter 1.</b> Organizations and Organization Theory</li> </ul>
	Jan. 19 Thursday (4)		<b>Reading</b> <ul style="list-style-type: none"> <li>▪ <b>Chapter 2.</b> The External Environment</li> </ul>
Week 3	Jan. 24 Tuesday (5)	<b>P2: Organizational Purpose and Structural Design</b>	<b>Reading</b> <ul style="list-style-type: none"> <li>▪ <b>Chapter 3.</b> Strategy, Organizational Design, and Effectiveness</li> </ul>
	Jan. 26 Thursday (6)		<b>Reading</b> <ul style="list-style-type: none"> <li>▪ <b>Chapter 4.</b> Fundamentals of Organizational Structure</li> </ul>
Week 4	Jan. 31 Tuesday (7)		<b>Reading</b> <ul style="list-style-type: none"> <li>▪ <b>Chapter 5.</b> Designing Organizations for Purpose</li> <li>▪ The Cobbler's Conundrum written by Jeff Chu, Fast Company, July/August 2013.</li> </ul> <p><b><i>Thought Assignment posted</i></b></p>
	Feb. 2 Thursday (8)	<b>Indigenous perspectives: Decolonization, Indigenization and Reconciliation</b>	<b>Reading</b> <ul style="list-style-type: none"> <li>▪ Gaudry, Adam, &amp; Lorenz, Danielle (2018). Indigenization as inclusion, reconciliation, and decolonization: Navigating the different visions for indigenizing the Canadian Academy. <i>Alternative: An International Journal of Indigenous Peoples</i>, 14, 218–227.</li> </ul>
Week 5	Feb. 7 Tuesday (9)	<b>P3: Open-System Design Elements</b>	<b>Reading</b> <ul style="list-style-type: none"> <li>▪ <b>Chapter 6.</b> Inter-organizational Relationships</li> </ul> <p><b>Assignment</b></p> <ul style="list-style-type: none"> <li>▪ <i>Thought Assignment due on Brightspace before 8 pm</i></li> </ul>
	Feb. 9 Thursday (10)		<b><i>Midterm review and class discussion</i></b>
Week 6	Feb. 14 Tuesday (11) *No class		BCom Midterm Exams  No Classes
	Feb. 16 Thursday (12) *No class		BCom Midterm Exams  No Classes
Week 7	Feb. 20 - 24 Monday – Friday *No classes		Reading Break  No Classes

Week 8	Feb. 28 Tuesday (13)		<b>Reading</b> <ul style="list-style-type: none"> <li>▪ <b>Chapter 7.</b> Designing Organizations for the International Environment</li> </ul> <b>Activities</b> <ul style="list-style-type: none"> <li>▪ Stage II of LPOII</li> <li>▪ Value Creation Business Model</li> <li>▪ Business Canvas Model</li> <li>▪ International Expansion Project to Asia  2023 Version</li> </ul>
	Mar. 2 Thursday (14)		<b>Reading</b> <ul style="list-style-type: none"> <li>▪ <b>Chapter 8.</b> Organizational Size, Life Cycle, and Decline</li> </ul>
Week 9	Mar. 7 Tuesday (15)	<b>P4: Internal Design Elements</b>	<b>Reading</b> <ul style="list-style-type: none"> <li>▪ <b>Chapter 9.</b> Organizational Culture, Control, and Ethics</li> </ul>
	Mar. 9 Thursday (16)		<b>Reading</b> <ul style="list-style-type: none"> <li>▪ Thomas, D., &amp; Ely, R. (2020). Getting Serious About Diversity: Enough Already with the Business Case. <i>Harvard Business Review</i>, 98(6), 114–122</li> <li>▪ Dobbin, F., &amp; Kalev, A. (2016). Why Diversity Programs Fail. <i>Harvard Business Review</i>, 94(7/8), 52–60.</li> </ul> <p><b>SHRM I:</b> Exploring the organizational culture of diverse and inclusive companies. Our focus will be on leadership for equity, diversity, and inclusivity in organizations with established levels of psychological safety.</p>
Week 10	Mar. 14 Tuesday (17)		<b>Reading</b> <b>Chapter 10.</b> Designing for Manufacturing, Service, and Digital Organizations
	Mar. 16 Thursday (18)		<b>Assignment</b> <ul style="list-style-type: none"> <li>▪ Mini Assignment due on Brightspace before 8 pm</li> </ul>
Week 11	Mar. 21 Tuesday (19)	<b>P5: Managing Dynamic Processes</b>	<b>Reading</b> <b>Chapter 12.</b> Conflict, Power, and Politics
	Mar. 23 Thursday (20) *Noclass		<b>Reading</b> <ul style="list-style-type: none"> <li>▪ Neely, T. (2012) Global Business Speaks English. <i>Harvard Business Review</i>, 90(5), 116–124.</li> </ul> <p><b>SHRM II:</b> Leading change in a global organization. Our focus will be on international context (Japan), change management (new language), and global leadership.</p>
Week 12	Mar. 28 Tuesday (21)		<b>Reading</b> <b>Chapter 13.</b> Decision-Making Processes
	Mar. 30 Thursday (22)		<b>Activity</b> <ul style="list-style-type: none"> <li>▪ Marshmallow Challenge Exploring Innovation</li> </ul> <b>Assignment</b> <ul style="list-style-type: none"> <li>▪ International Expansion Proposal due on Brightspace before 8 pm</li> </ul>
			Final Presentations I

Week 13	Apr. 4 Tuesday (23)		Final Presentations II
	Apr. 6 Thursday (24)		Final Presentations III

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



## COM 331 (A01, A02, A03, A04, A05)

### Introduction to Management Information Systems

#### Spring 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	<i>Synchronous session times</i>  A01      10:00 am - 11:20 am A02      11:30 am - 12:50 pm A03      8:30 am - 9:50 am A04      4:30 pm - 5:50 pm A05      3:00 pm - 4:20 pm
Instructor:	Professors Jan Kietzmann and Andrew Park
Office hours:	<i>Please contact the respective instructor with questions only pertinent to the content they covered.</i>  <b>Jan:</b> Wednesdays, 1-2pm (PST), by appointment in BEC214 or on Zoom at <a href="https://uvic.zoom.us/my/kietzo">https://uvic.zoom.us/my/kietzo</a>  <b>Andrew:</b> Tuesdays, 1-2pm (PST), by appointment in BEC 150 or on Zoom at <a href="https://uvic.zoom.us/my/apark1">https://uvic.zoom.us/my/apark1</a>  <i>For other correspondence, with the exception of holidays and weekends, we will try to respond to your emails within 48 hours of receiving them. Occasionally, we will send emails individually or to the whole class. Please make sure you check your email regularly.</i>
Email:	<a href="mailto:JKietzma@uvic.ca">JKietzma@uvic.ca</a> and <a href="mailto:Apark1@uvic.ca">Apark1@uvic.ca</a>

***We acknowledge and respect the lək'wəjən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.***

## **Introduction:**

This course is designed to introduce you to thinking analytically about the role of information systems, technologies and networks in modern organizations, in support of business strategy, strategic initiatives, operations, and corporate philosophies. We will use a variety of approaches to examine how they can be used effectively in today's connected enterprise, whether small or large, or whether in support of general business goals or of an entrepreneurial advantage. We will focus on both the technical elements of modern information systems, as well as managerial perspectives on the use, design, and evaluation of information systems. Our aim is to complement and enhance the expertise of technical specialists and create a holistic understanding about technology in organizations for the 21st century.

## **Texts and Resources:**

Throughout the course, we will combine different types of materials. The content of all class materials, such as class discussions and student presentations, videos, assigned readings, etc. is subject to examination in the midterm and final exam.

Open-Source Textbook: Bourgeois, D. T., Smith, J. L., Wang, S., & Mortati, J. (2019). Information systems for business and beyond. Download it [here](#).

In the second half of the course, we'll be using cases. Your US\$34 reading package can be found [here](#).

## **Course Objectives and Description:**

The course objectives are to teach you to:

- Understand the role of Information Systems in modern organizations and the fundamental individual, social, managerial, environmental and technical issues that decision makers must be able to address.
- Gain a basic technical understanding of information systems and how they work.
- Gain hands-on experience on how to create and modify basic information systems.
- Think critically about technology, question its merits, consider its drawbacks and anticipate its long term intended and unintended consequences, which is especially important in the current vendor-driven environment.
- Develop a basic set of tools, frameworks and models for guiding questions and decisions about Information Systems.
- Create a learning environment that will increase your comfort and familiarity with making smart decisions about technology for your organization.

## **Course Format:**

This course will combine teaching cases, lectures, discussion, and in-class exercises, to introduce you to the concepts and business issues facing managers as they deal with the new realities of electronically mediated business.

Learning is an active process - the more active you are, the more you will learn. Therefore, the course will rely heavily on outside reading and preparation to make maximum use of in-class time.

We will often use a “flipped classroom” lecture format. That means that our class time requires participation to be successful. When you participate in class, you help create the integrative material from which everyone learns. Thus, participation is rewarded—both since it is an indicator of your understanding of the materials, and to incentivize you to speak and participate actively in your breakout groups, so that we have an engaging dynamic.

## **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, We intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if we can do better to support your rights in our classroom. We will also do my best to listen and respond compassionately if you want to share with us how we can be a better ally.

## **Educational Technology**

We use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: Microsoft 365, Tableau, QGIS, ArcGIS, VMWare. We will make you aware if this list changes. We use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at:

<https://privacy.microsoft.com/en-ca/privacystatement>  
<https://www.tableau.com/privacy>

<https://qgiscloud.com/en/pages/privacy>  
<https://www.vmware.com/ca/help/privacy.html>

If you are not comfortable with your personal information being stored outside of Canada, please speak to us within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

## **Evaluation Elements:**

Students will be evaluated according to the following schedule:

Title	%of grade
Com331.1. Tech Talks (Group)	20%
Com331.2. Participation and in-class exercises (Individual and Group)	15%
Com331.3. Midterm (Individual) –February exam period	30%
Com331.4. Final exam (Individual, cumulative) – April exam period	30%
Com331.5. KPMG (Group)	5%
Total	100%

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that we may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

**Group Work:** At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty."

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

**Missed Coursework or Assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.



## **Course Assessment**

### **Com331.1. Tech Talks (Group)**

In addition to learning about information technology (IT), this course aims to help you *learn about learning about IT and information systems more broadly*. That is, developing the cognitive skills to help you keep learning about new Its as they emerge. Time will be set aside in the first class to discuss this deliverable, opportunities to practice Tech Talks and feedback mechanisms in detail.

The goal of this presentation is to brief the class on a nascent information technology or system. This topic will be assigned early in the semester. In your Tech Talk, you will need to answer two key questions: What is it? and As a general manager, why should I care?

The in-class, synchronous deliverable will consist of a 10-minute team presentation, followed by a 5-minute discussion. You may organize yourselves as you best see fit to make a clear, memorable, and compelling Tech Talk, but everyone in your group needs to present. The only other rule is: NO POWERPOINT. That's right, you will NOT be allowed to use ANY slides, videos, images or media of any kind, for this presentation. PowerPoint has become a regrettable crutch for many managers, and often substitutes for content. Your challenge is to be compelling in person, using all of the personal online communication tools you've developed during the Bachelor program, and to explore others. Please keep in mind that it is important to think about your audience and their ability to absorb content. Sometimes, as they say, "less is more".

This is your chance to be truly creative, and we encourage you to innovate.

You will be evaluated based on the following criteria:

<b>Technology:</b>	What are we talking about? Description and explanation	30%
<b>Impact:</b>	Why should managers care? Depth, clarity & completeness of analysis	30%
<b>Presentation:</b>	Group dynamics, flow and time management	20%
<b>Moderation:</b>	Ability to manage the discussion and answer questions	20%

A great Tech Talk shows excellent understanding of technology and exposition of relevant issues, insightful and well-informed arguments, clear evidence of independent thought, good awareness of nuances and complexities, and an engaging experience for everyone.

### **Com331.2. Participation and in-class exercises (Individual and Group)**

Regular **attendance** is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Core year experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

While attendance is a pre-requisite for participation, we understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, we encourage you to stay home when you are sick, taking care of yourself and protecting others. If you are missing class on a given day due to illness, injury or family affliction, please document this by submitting the Gustavson self-declaration form to the BCom office (bcom@uvic.ca). Appropriate documentation must be submitted immediately upon your return to classes (within 24 hours). Absences supported by a self-declaration form will be considered excused and will not count against your participation grade. However, absences *not*

supported by a self-declaration form will be considered unexcused<sup>1</sup>. Attending class is always your choice. You may choose to miss class for a job interview, home responsibilities, work-life flexibility or a host of other reasons. However, because your absence negatively affects your intrinsic learning, as well as your teammates and the overall classroom environment, more than three unexcused absences will have consequences. If you choose to have more than three unexcused absences, your participation grade will be jeopardized.

The quality of your class **participation** will be assessed on the extent to which they facilitate collective learning. A quality contribution reflects thoughtful, creative and incisive analysis, versus simply reciting facts from the reading. Quality contributions help others learn, perhaps by synthesizing points of view, redirecting a discussion that has hit an impasse, clarifying ambiguities or provoking debate. Our classroom should be a safe environment to take risks and challenge ourselves. Details will be discussed in week 1.

Please refer to the participation grading guide on the following page.

If you're shy... we understand and respect that everyone is different and will be more or less comfortable speaking up in our classes. Our class is risk- and judgment-free, and it's on us to make sure you feel comfortable sharing your ideas, perspectives and opinions with your colleagues. Please talk to us if you need a little extra encouragement.

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<sup>1</sup> \*unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site.

### **Grading rubric: Participation**

<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>F</b>
Participation is very frequent and demonstrates an in-depth reflection on, and personalization of, the theories, concepts, cases and/or strategies presented in class and in the readings.	Participation is frequent and demonstrates a general reflection on, and personalization of, the theories, concepts, cases and/or strategies presented in class and in the readings.	Participation is irregular and demonstrates a minimal reflection on, and personalization of, the theories, concepts, cases and/or strategies presented in class and in the readings.	Participation is rare and demonstrates a lack of reflection on, or personalization of, the theories, concepts, cases and/or strategies presented in the class and in the readings.	No participation
Viewpoints and interpretations are insightful and well supported.	Viewpoints and interpretations are supported.	Viewpoints and interpretations are unsupported or are simply summaries of the points.	Viewpoints and interpretations are missing, inappropriate, and/or unsupported.	
Clear, detailed examples are provided that offer superior enrichment and elaboration of the subject content.	Appropriate examples are provided, as applicable.	Examples, when applicable, are not provided.	Examples, when applicable, are not provided.	
Participation facilitates learning, discussion, and enrichment of the subject matter.	Participation facilitates some basic enrichment and elaboration of the subject matter and offers enough insight to facilitate learning.	Participation facilitates little enrichment of the subject matter.	Participation facilitates little to no elaboration and enrichment of the subject matter.	
Normally achieved by a minority of exceptional students.	Normally achieved by the largest number of students.	Normally achieved by a minority of students.	Normally achieved by very few students.	

### **Com331.3. Midterm (Individual)**

A midterm exam will assess your overall understanding of the material. It will include both multiple choice and short answer questions.

### **Com331.4. Final exam (Individual, cumulative)**

A cumulative final exam will assess your overall understanding of the material. It will include both multiple choice and short answer questions.

### **Com331.5. KPMG (Group)**

Prof. Ricardo Flores (ricardoflores@uvic.ca) will provide additional details.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

<b>Percentage Range</b>	<b>Grade s</b>	<b>Grade Point Value</b>	<b>Description</b>
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Students who have a passing grade throughout the term but have a failing final grade due to their performance on the final examination may be eligible to write a supplemental exam. Such supplemental exams are limited to one core course per term for any student. The BCom office will notify eligible students after all term grades for core classes have been submitted. A final grade in the course with a passing supplemental exam result cannot exceed 59%

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

## **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### **Accommodations:**

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

## Schedule Summary:

Class	Date	Topic	Preparation	Class Activities
1 AP	Jan 09	<i>Introduction of course and instructors</i>	Read course outline	Introduction to professors, course introduction and deliverables (30 min) Choosing Tech Talk topics (20 min) Introduce flipped classroom (10min) Flipped classroom discussion (20 min)
2 AP	Jan 11	<i>Chapter 1: What Is an Information System?</i>	Read Chapter 1	Key construct review from reading (20 min) Breakout groups and review (30min) Flipped classroom discussion (30 min)
3 AP	Jan 16	<i>Chapter 2: Hardware</i>	Read Chapter 2	Key construct review from reading (20min) Breakout groups and review (30 min) Demonstration(Raspberry Pi) (30min)
4 AP	Jan 18	<i>Chapter 3: Software</i>	Read Chapter 3	Key construct review from reading (20 min) Flipped classroom discussion (30 min) Demonstration (WebApp) (30 min)
5 AP	Jan 23	<i>Chapter 4: Data and Databases</i>	Read Chapter 4	Key construct review from reading (20 min) Breakout groups and review (30 min) Demonstration (WebApp) (30min)
6 AP	Jan 25	<i>Chapter 4: Data and Databases (cont'd)</i>	Review unstructured data provided and come up with a draft of potential data fields and data types	Database design exercise (60min) Database exercise discussion (20 min)
7 AP	Jan 30	<i>Chapter 5: Networking and Communication</i>	Read Chapter 5	Key construct review from reading (20 min) Breakout groups and review (30 min) Demonstration: how does the internet work? (30 min)
8 AP	Feb 1	<i>Chapter 5: Networking and Communication (cont'd)</i>	Read article: "The truth about 5G: It's not (only) about downloading movies faster!"	Key construct review from reading (20 min) Flipped classroom discussion (30 min) Lab exercise from Chapter 5 (30 min)
9 AP	Feb 6	<i>Chapter 6: Information Systems Security</i>	Read Chapter 6	Key construct review from reading (20min) Breakout groups and review (30 min) Demonstration (encryption) (30 min)
10 AP	Feb 8	<i>Chapter 6: Information Systems Security (cont'd)</i>	Read "Sophos" security policy Bring one article or case study of a security breach	Demonstration (blockchain) (30 min) Security policy Review from reading (30 min) Midterm review (20 min)
Feb 13, Feb 15		Midterm Week		
Feb 20, Feb 22		Reading Week		
11 AP	Feb 27	<i>Chapter 10: Information Systems Development</i>	Read Chapter 10	Key construct review from reading (20 min) Breakout groups and review (30 min) Demonstration (website development) (30 min)
12 AP	Mar 1	<i>Chapter 10: Information Systems Development (cont'd)</i>	Complete Chapter 10, Exercises 1-3	Key construct review from reading (20 min) Flipped classroom discussion (30 min)

				Coding demonstration (30 min)
Transition from technical to organizational focus				
13 JK	Mar 6	<i>Enterprise Resource Planning Systems &amp; IT Implementation</i>	Rich Con Steel Case <i>Online Interview</i>	<b>Tech Talk 1:</b> BPR, <b>TechTalk 2:</b> ERP (30 minutes) Case discussion (50 minutes)
14 JK	Mar 8	<i>Customer Relationship Management Systems</i>	HubSpot & Motion AI: Chatbot-Enabled CRM Case <i>Online Interview</i>	<b>Tech Talk 3:</b> NLP (15mins) Case discussion (65 minutes)
15 JK	Mar 13	<i>Supply Chain Management Systems</i>	Coda Coffee Case <i>Online Interview</i>	<b>Tech Talk 4:</b> Asset Mgmt, <b>Tech Talk 5:</b> IIOT (30 mins) Case discussion (50 minutes)
16 JK	Mar 15	<i>Human Resource Management Systems</i>	GROW: Using Artificial Intelligence to Screen Human Intelligence	<b>Tech Talk 6:</b> Ethics and MIS (15mins), Case discussion and ChatGPT demo (65 minutes)
17 JK	Mar 20	<i>Decision Support Systems &amp; Business Intelligence</i>	Target Stores: The Hunt for "Unvolunteered Truths" Case (Optional) What Humans Lose When We Let AI Decide	<b>Tech Talk 7:</b> RPA, <b>Tech Talk 8:</b> Data Analytics (30mins) Case discussion (50 minutes)
	Mar 22	<i>KPMG Simulation</i>		
18 JK	Mar 27	<i>Digital Transformation</i>	Tech with a Side of Pizza: How Dominos Rose to the Top Case	<b>Tech Talk 9:</b> Crowdsourcing, <b>Tech Talk 10:</b> Gig Economy Case discussion (50 minutes)
19 JK	Mar 29	<i>Cybersecurity</i>	iPremier(A): Denial of Service Attack (Graphic Novel Version) Case <i>Online Interview</i>	<b>Tech Talk 11:</b> The Dark Side of IT (15 mins) Case discussion (65 minutes)
20 JK	Apr 03	<i>Future Trends in Information Systems</i>	Evie.ai: The Rise of Artificial Intelligence, and the Future of Work Case (optional) How Human-Computer 'Superminds' Are Redefining the Future of Work	<b>Tech Talk 12:</b> Quantum Computing (15mins) Case discussion (65 minutes)
21 AP & JK	Apr 05	Review Session		





## COM 362

### Business and Sustainability Spring 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	<p><b>Slawinski:</b> A01 Mondays and Wednesdays from 8:30 – 9:50 am PST A02 Mondays and Wednesdays from 10:00 –11:20 am PST</p> <p><b>Chavez:</b> A03 Mondays and Wednesdays from 11:30 – 12:50 pm PST</p> <p><b>Saravanapavan:</b> A04 Mondays and Wednesdays from 1:30pm to 2:50pm PST A05 Mondays and Wednesdays from 4:30pm to 5:50pm PST</p>
Location	<p>A01 - DSB C112 A02 - DSB C116 A03 - DSB C122 A04 - DSB C116 A05 - DSB C122</p>
Instructor	<p>Natalie Slawinski, BEC 432 Juan Francisco Chavez, BEC 473 Lukshmee Saravanapavan, BEC 472</p>
Office hours:  Office Hours are available on Zoom	<p><b>Slawinski:</b> Mondays 1:00pm – 2:00pm Zoom link: <a href="https://uvic.zoom.us/j/81143775874?pwd=MkJZemZUK0F2ZkY6SjF1OXM5eXhmdz09">https://uvic.zoom.us/j/81143775874?pwd=MkJZemZUK0F2ZkY6SjF1OXM5eXhmdz09</a> Meeting ID: 811 4377 5874   Password: 270531</p> <p><b>Chavez:</b> Mondays 1:00pm – 2:00pm Zoom link: <a href="https://uvic.zoom.us/j/81385525079?pwd=WktVU0lVQXNFNUZTZnN2c3MrUHIFUT09">https://uvic.zoom.us/j/81385525079?pwd=WktVU0lVQXNFNUZTZnN2c3MrUHIFUT09</a> Meeting ID: 813 8552 5079   Password: com362</p> <p><b>Saravanapavan:</b> Mondays 11:30am – 12:30pm Zoom link: <a href="https://uvic.zoom.us/j/82615444659?pwd=MFhEWGZGME9SLytKUmMyaVVqWC9qQT09">https://uvic.zoom.us/j/82615444659?pwd=MFhEWGZGME9SLytKUmMyaVVqWC9qQT09</a> Meeting ID: 348 693 4980   Password: 2503991</p>
Email:	<p><a href="mailto:nslawinski@uvic.ca">nslawinski@uvic.ca</a> <a href="mailto:jfchavez@uvic.ca">jfchavez@uvic.ca</a> <a href="mailto:lukshmee@uvic.ca">lukshmee@uvic.ca</a></p>

*We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.*

*UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.*

## **Introduction:**

### **Natalie Slawinski**

I am really looking forward to teaching Com 362 alongside Juan Francisco and Lukshmee. As the director of the Centre for Social and Sustainable Innovation (CSSI), my role is to help push sustainability to the next level within Gustavson and beyond. When I am not teaching or working to advance CSSI's goals, I conduct research on organizational responses to sustainability challenges. My past research focused on corporate sustainability and my current research takes a broader approach to sustainability by examining the role of social enterprise in community revitalization. My hope is that this course will inspire you to become change agents for regeneration. I believe that by drawing on courage and deep understandings of the state of the world, including business, collectively we can navigate the major challenges our world faces and bring it back to a healthier state.

### **Juan Francisco Chavez**

Welcome to COM 362! I am looking forward to meeting you all and to start learning together about the exciting and ever-changing field of business and sustainability. My experience in the field comes from my work in the public and private sectors, and from my work as a researcher. My research explores how social and environmental concerns become part of the institutional landscape that organizations must navigate, and how organizations can seize opportunities to maximize value creation through cooperation with stakeholders. My goal is that after this course students will feel better prepared to navigate the complexities of current times while creating value for businesses, stakeholders, and society at large.

### **Lukshmee Saravanapavan**

I am excited to be exploring the topic of sustainability and business with you this term. This is an arena I have had the privilege to work in across public and private sectors, including institutions such as the World Bank and Moody's Analytics, prior to my PhD here at the University of Victoria. I am currently working on sustainability research exploring conflicts between corporations, particularly extractive industry ones, and the communities in which they are embedded; this research combines together critical topics that we will be discussing in class such as ESG investing and human rights. I hope, that by the end of the semester, you will feel encouraged to take the first steps of becoming stewards of sustainable development in whatever career you may choose.

## **Texts and Resources:**

**We do not have a textbook for this course.** We find that the materials change so often and written textbooks have trouble keeping up. In addition, this is a very practical course and we draw on readings from documents (such as the UN Declaration of Human Rights) that are available on websites and through the UVic Library.

Two benefits of this are that there is no cost to you, and that course material can be accessed anywhere. Links to course material will be posted regularly into our course site on Brightspace.

The only item you need to purchase for this class is a case. Please follow this link to Ivey and purchase the case. Please note that it is illegal to share your case with another student. Every student must purchase their own case. Ivey is very good about letting us know how many cases they sell for our course.

<https://www.iveypublishing.ca/s/product/shorefast-a-strange-and-familiar-way-to-reimagine-capitalism/01t5c00000CwpYn>

## **Course Objectives and Description:**

Sustainability in business is both an imperative and an opportunity. It is a strategic business issue—some say it is *the* strategic issue facing business in the 21st century. On the imperative side, the business environment and competitive landscape has changed such that all companies, if they are to meet the requirements of today's marketplace and business environment, are well advised to

incorporate Sustainability into business strategies, product and service design, production processes, and stakeholder relationships.

Further, at the big picture level, the inherent unsustainability of our current industrial system is creating concerns about climate change, environmental degradation, loss of biodiversity, human health, social and environmental conflict, poverty, working conditions, among other issues. In response to pressures from all quarters – consumer markets, corporate customers, regulatory agencies, stakeholder activists, and the investment community – the business environment is gradually, but clearly, shifting to favour environmentally and socially responsible products, services, and practices. This presents various opportunities for astute businesses and entrepreneurs, but also calls for universities and research centers to play their part in the generation of knowledge aimed to help society to shift into more sustainable ways of production.

The purpose of this course is to educate students, and foster research, on the opportunities and challenges of developing more sustainable business strategies and practices, and to explore the changing role of business in society and in relation to the environment.

The course will prepare students to engage with and use concepts, tools, and frameworks commonly used by businesses in the transition to practices that – in addition to addressing traditional financial goals – incorporate social and environmental sustainability into their strategy and operations.

Upon successful completion of Com 362, students will be able to:

- Recognize and describe the social and environmental issues affecting businesses and society today.
- Identify business organizations as embedded in social and ecological systems.
- Recognize and understand the power of business to negatively or positively affect environmental, social, and economic well-being.
- Recognize and engage stakeholders holding multiple and often times divergent interests.
- Apply key and cutting-edge sustainability frameworks, tools, and concepts.
- Execute their own research projects and critically assess other scholars' research on sustainability-related topics.
- Be aware of their own role when participating in personal and professional decisions related to social, environmental, and economic sustainability.

### **Course Format:**

Our teaching philosophy centres on an appreciation of diverse and contrasting viewpoints, critical thinking, creativity, and experiential learning. We aim to expose students to a wide range of perspectives on the link between business and sustainability; challenge them to think critically, develop their own opinions, and be able to defend them; and enable students to apply course principles in a variety of contexts.

The course draws on a range of learning tools: lecturing, readings, guest speakers, audio-visual materials, PowerPoint slides, class discussions and exercises, individual and group assignments, web-based sources, simulations, and illustrative cases. These are designed to fulfill the course objectives: they will familiarize you with the social, environmental and financial challenges and opportunities faced by managers today, and introduce them into a range of responses and innovations by and for business.

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive

community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

## **Educational Technology**

We use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

## **Evaluation Elements:**

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type	Due Date	Weight/ % of grade	Description
Active Participation	Individual	In-class	Every session	15%	Active participation is comprised of three components: attendance, punctuality, and participation. Each of these components is marked separately. Participation includes answering questions, voicing ideas, contributing to class discussions, active involvement in group work, etc.
Midterm exam	Individual	Online	Week 6: Feb. 13-17	20%	The midterm will cover all course content from Week 1 to Week 5.
Assignment	Group	Report	April 7 <sup>th</sup> (8:00pm)	30%	Check Brightspace for instructions.
Final Exam	Individual	TBD	TBD	35%	The final exam covers all course content.
<b>Total</b>				<b>100%</b>	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that we may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

## **Course Experience Survey:**

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### **Course Assessment:**

**Group Work:** At the Gustavson School of Business team projects and assignments are an integral component to student learning. In group-based assignment, all members of the group will receive the same grade. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty."

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

**Late Work:** In the absence of a medical or family emergency there will normally be a grade penalty of 10% for each day an assignment is late.

**Attendance and Participation:** Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your own and your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Core year experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

In this course, attendance and participation will form part of your course grade as indicated in the Evaluation Elements section.

While attendance is a pre-requisite for participation, we understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, we encourage you to stay home when you are sick, taking care of yourself and protecting others. If you are missing class on a given day due to illness, injury or family affliction, please document this by submitting the Gustavson self-declaration form to the BCom office ([bcom@uvic.ca](mailto:bcom@uvic.ca)). Appropriate documentation must be submitted immediately upon your return to classes (within 24 hours). Absences supported by a self-declaration form will be considered excused and will not count against your participation grade. However, absences *not* supported by a self-declaration form will be considered unexcused. Attending class is always your choice. You may choose to miss class for a job interview, home responsibilities, work-life flexibility or a host of other reasons. However, because your absence negatively affects your intrinsic learning, as well as your teammates and the overall classroom environment, more than three unexcused absences will have consequences. If you choose to have more than three unexcused absences, your participation grade will be jeopardized.

In addition, if you choose to have more than three unexcused absences, you will receive a 3% reduction in your final grade for the course. More than five unexcused absences will result in a 5% reduction in your final grade.

\*unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site.

**Missed Coursework or Assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grad	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Students who have a passing grade throughout the term but have a failing final grade due to their performance on the final examination may be eligible to write a supplemental exam. Such supplemental exams are limited to one core course per term for any student. The BCom office will notify eligible students after all term grades for core classes have been submitted. A final grade in the course with a passing supplemental exam result cannot exceed 59%

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

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As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student’s record in the Registrar’s office.

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Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

## Schedule Summary:

**IMPORTANT:** Course materials will be posted on Brightspace. These are mandatory for preparation for each session. Also, check Brightspace regularly for updates or changes to the Course Schedule.

Title	Type	Date	Description
<b>WEEK 1</b>			
Course introduction and definitions of sustainability	In-class	Mon, Jan 9	* Review of course outline * Definitions of sustainability and other key concepts
Why sustainability matters	In-class	Wed, Jan 11	* State of the world (planetary boundaries, climate change, poverty, human rights violations, social conflict) * Systems thinking perspective * Stakeholder view of the firm
<b>WEEK 2</b>			
Re-imagining Capitalism	In-class	Mon, Jan 16	* Review of the current market system * What would Capitalism 2.0 look like? * Newmodels: circular economy, regenerative economy
Re-Imagining Capitalism	In-class	Wed, Jan 18	* Shore fast case
<b>WEEK 3</b>			
Sustainable Development Goals (SDGs)	In-class	Mon, Jan 23	* Goals, targets, and indicators * Progress and rankings * Emerging frameworks (Global Compact)
Guest speaker: Seth Klein**	Cinecenta	Tues, Jan 24 1-2:20pm	** Seth Klein is author of <a href="#">"A GoodWar: Mobilizing Canada for the Climate Emergency"</a>
No class		Wed, Jan 25	
<b>WEEK 4</b>			
Integrating Sustainability into Business	In-class	Mon, Jan 30	* Business case for sustainability
Research session: Emily Nickerson**	Zoom	Tue, Jan 31 1-2:20pm	** Emily Nickerson is UVic's Business Librarian and her session will be helpful for your group assignment.
No class		Wed, Feb 1	
<b>WEEK 5</b>			
Measuring impact in society	In-class	Mon, Feb 6	* Ecological footprint activity * Intro to frameworks: LCA, ESGs
Measuring impact in society	In-class	Wed, Feb 8	* Trends in impact measurement
<b>WEEK 6</b>			
Midterm Week: Feb 14-18 (No Classes)			
<b>COM 362 Midterm: TBD</b>			
<b>WEEK 7</b>			
Reading Break: Feb. 21-25 (No Classes)			
<b>WEEK 8</b>			
Ethics and values	In-class	Mon, Feb 27	* Recognizing an ethical decision



Title	Type	Date	Description
Guest Speaker: Robert Jawl**	Cinecenta	Tue, Feb 28 1-2:20pm	* Ethical decision-making framework * Giving voice to values
No class		Wed, Mar 1	** Robert Jawl is Managing Director of <a href="#">Jawl Properties</a> , the case study we are using for the assignment.
<b>WEEK 9</b>			
Sustainable and Integrated Reporting	In-class	Mon, Mar 6	* Review of impact measurement * Sustainability reporting frameworks
Sustainable and Integrated Reporting	In-class	Wed, Mar 8	* Materiality assessment * How to read a sustainability report
<b>WEEK 10</b>			
Human Rights and Indigenous Rights	In-class	Mon, Mar 13	* Brief history * Main treaties and conventions * Key rights
Pipeline simulation	In-class	Wed, Mar 15	* Tripartite framework: protect, respect, remedy
<b>WEEK 11</b>			
Business and government relations	In-class	Mon, Mar 20	* Sustainability-related policy * Lobbying
KPMG Simulation	No class	Wed, Mar 22	
<b>WEEK 12</b>			
Greenwashing and potential solutions: B-Corp certification	In-class	Mon, Mar 27	* Types of greenwashing * B-Corp certification
Guest Speaker: Brad Liski**	Cinecenta	Tue, Mar 28 1-2:20pm	** Brad Liski is CEO and Co-Founder of <a href="#">Tru Earth</a>
No Class		Wed, Mar 29	
<b>WEEK 13</b>			
Social Entrepreneurship	In-class	Mon, Apr 3	* Defining social entrepreneurship and social innovation * Shorefast case revisited
Review	In-class	Wed, Apr 5	Review for the final exam
<b>Assignment</b>	<b>Brightspace - Assignment</b>	<b>Fri, Apr 7 Due: 8pm</b>	<b>Final assignment</b>
<b>Final exam</b>	<b>Exam</b>	<b>TBD</b>	<b>* All course content</b>

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



## COM 371 (A01-A05)

### Management Finance

### Spring 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	A01: Tue, Thu 11:30am- 12:50pm A02: Tue, Thu 8:30am- 9:50am A03: Tue, Thu 10:00am – 11:20am	A04: Tue, Thu 4.30-5.50pm A05: Tue, Thu 3.00-4.20pm
Location	A01: DSB C112 A02: DSB C116 A03: DSB C122	A04: DSBC116 A05: DSB C122
Instructor:	Sorin Rizeanu	Stuart Snaith
Office:	BEC 478	BEC 238
Office hours:	Tuesday, 2-4pm or by appointment	Thursday 12-2pm or by appointment
Email:	srizeanu@uvic.ca	ssnaith@uvic.ca

***We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.***

### **Texts and Resources:**

The required textbook for this course is:

- ***Introduction to Corporate Finance, 5th Canadian Edition***

by Laurence Booth, W. Sean Cleary, Ian Rakita (Wiley: Toronto, ON) ISBN: 978-1-119-56162-0

The text can be purchased or rented online at Wiley:

<https://www.wiley.com/en-ca/Introduction+to+Corporate+Finance%2C+5th+Canadian+Edition-p-9781119561620>

The text can also be purchased at the Campus Bookstore. If you want to use a previous edition, be aware that the section numbers and end of chapter problems may have changed. Please double check with me if you have any questions

- **MS Excel:**

Students are required to have and be able to use MS Excel, at least at beginner level proficiency. In the business world, more than 60% of businesses use spreadsheets. Beyond having all the important financial functions already integrated, Excel's formatting tools make your results easy to present and explain

## **Course Objectives and Description:**

This course provides an introduction to corporate financial management and the key decisions and issues faced by financial officers in corporations. The course has three major objectives:

1. Provide an introduction to financial markets and the sources of capital for mature firms.
2. Introduce financial policies set by senior managers and show how these policies affect a company's ability to pursue its business strategy and achieve its operational objectives.
3. Demonstrate the analytical tools used to evaluate whether proposed business activities add value to a company.

The goal is to ensure all students, regardless of career aspirations, gain an appreciation for the financial issues facing companies and to equip all students with the analytical tools that are used to address these issues.

The topics covered in this course include: time value of money; bond and equity valuation; investing; risk, return and portfolio theory; the capital asset pricing model (CAPM) and cost of capital; capital budgeting and project evaluation using internal rate of return (IRR) and net present value (NPV).

Upon completing the course, students should be able to define basic terminology, to understand the theoretical relationships, and to apply the analytical techniques covered in the course to various decision-making situations. Students will develop problem-solving and decision-making skills through practical examples and assignments.

We will be using Excel extensively in this course. Excel is an excellent financial tool that is an industry standard for financial professionals. Students will be asked to solve financial problems using Excel. Students are encouraged to review Excel basics before the course. Within Excel, you can find tutorials by typing "Excel for Windows training" in the bar "Tell me what you want to do...". Or you can find many introductory videos on YouTube, including this one: "The Beginner's Guide to Excel - Excel Basics Tutorial" <https://youtu.be/rwbho0CgEAE>

## **Course Format:**

The course provides an introduction to corporate financial management. It consists of lectures designed to provide the framework, concepts, and tools for analyzing financial decisions. The lectures are structured as active discussions, not only presentations of information, and students are expected and encouraged to actively participate.

Students are responsible for reading the assigned material, and are expected to come to class fully prepared. Questions will be asked in class and each student is encouraged to actively participate in these discussions. Cold calls (i.e. asking randomly selected students a direct question) will be made for those students who need encouragement to speak in public.

## **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this course, we intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let us know if we can do better to support your rights in our classrooms. We will also do our best to listen and respond compassionately if you want to share with us how we can be a better ally.

## **Educational Technology**

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: youtube. I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at <https://www.youtube.com/yt/about/policies/#community-guidelines>. I encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

## **Evaluation Elements:**

Students will be evaluated according to the following schedule:

<b>Title (begin with Course Code)</b>	<b>Individual or Group</b>	<b>Type</b>	<b>Due Date</b>	<b>Weight / % of grade</b>	<b>Description</b>
COM 371 Participation	Individual	Other	Every class	8%	Attendance, speaking
COM 371 Quizzes	Individual	Quiz	See quiz date table below	40%	8 quizzes, 30 minutes each
COM 371 Final Exam	Individual	Exam	To be determined.	30%	Final exam, comprehensive.
COM 371 Excel Project	Team	Other	6 April 2023, 8 PM PT	20%	Buy/rent an apartment
COM 371 KPMG simulation	Team	Simulation	To be determined.	2%	Successful completion of onboarding tasks
Total				100%	
<b>BONUS:</b> RBC Case competition	Individual	Other	To be determined	+2% Added to final grade	Students who progress to the semi-finals

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

## **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

## **Course Assessment:**

Description of evaluation standards for evaluation elements.

### **Group Work:**

At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty."

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

### **Late Work:**

In the absence of a medical or family emergency there will normally be a grade penalty of **5%** for each day an assignment is late.

### **Attendance and Participation:**

Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Core year experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Given the importance of attendance and participation, in this course they will form part of your course grade (8%)

While attendance is a pre-requisite for participation, we understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, we encourage you to stay home when you are sick, taking care of yourself and protecting others. If you are missing class on a given day due to illness, injury or family affliction, please document this

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#### Missed Coursework or Assessments:

Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.

#### Quizzes:

Students in this course will complete eight (8) quizzes worth a combined total of 40% of your final grade. Each quiz will be on BrightSpace. Quizzes will be scheduled once per week, starting in the second week of the course. The quiz each week will cover the material assigned and covered over the previous week, unless specified otherwise. Several quizzes will cover multiple classes. Your weekly quiz will open Friday at 08:00 PT and must be completed by Monday at 20:00 PT. Students will have 30 minutes to complete each quiz once the quiz is begun. At the end of 30 minutes, the quiz will close automatically and any work will be submitted. A failure to attempt a quiz will lead to a grade of 0% on that quiz.

Quiz	Opens 08:00 PT	Closes 20:00 PT	Chapter
1	20-Jan-23	23-Jan-23	Ch. 5
2	27-Jan-23	30-Jan-23	Ch. 5
3	3-Feb-23	6-Feb-23	Ch. 6
4	10-Feb-23	13-Feb-23	Ch. 7
5	3-Mar-23	6-Mar-23	Ch. 8
6	10-Mar-23	13-Mar-23	Ch. 9, Options Slides
7	17-Mar-23	20-Mar-23	Ch. 13
8	24-Mar-23	27-Mar-23	Ch. 20

Yellow text indicated a change in the examinable quiz content due to a class being unavoidably cancelled.

If you experience technical difficulties, please email your instructor with an explanation of what happened as soon as possible. Based on your circumstances, your instructor will then decide whether to reset your quiz or not. Please allow for delays if you are emailing over the weekend.

Quizzes will consist of qualitative and quantitative questions. A question may be multiple choice, match the answer, or some other BrightSpace format that can be graded automatically. For some quantitative questions, you will be asked to enter the numerical answer based on the inputs given. You will not be able to show your work. You are expected to use Excel or a financial calculator to get the correct answer. If you make a mistake in Excel or with your financial calculator and submit the wrong number on BrightSpace, you will get the question wrong. It is your responsibility to learn how to use these tools effectively.

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## **Schedule Summary:**

<b>Title</b>	<b>Date</b>	<b>Chapters</b>
COM 371:Introduction	10-Jan-23	Chapters 1 and 2
<b>WPSC - no Class</b>	12-Jan-23	
<b>Class cancelled – <i>force majeure</i></b>	17-Jan-23	
COM 371:TVM	19-Jan-23	Chapter 5
COM 371:TVM, loans and mortgages	24-Jan-23	Chapter 5
COM 371:Review Class/Problem Solving	26-Jan-23	
COM 371:Bond Valuation	31-Jan-23	Chapter 6
COM 371:Bond Valuation	2-Feb-23	Chapter 6
COM 371:Equity valuation	7-Feb-23	Chapter 7
COM 371:Equity valuation	9-Feb-23	Chapter 7
<b>Mid-term Week – no class</b>	14-Feb-23	
<b>Mid-term Week – no class</b>	16-Feb-23	
<b>Reading Week – no class</b>	21-Feb-23	
<b>Reading Week – no class</b>	23-Feb-23	
COM 371:Review Class/Problem Solving	28-Feb-23	
COM 371:Risk, return and portfolio theory	2-Mar-23	Chapter 8
COM 371:CAPM	7-Mar-23	Chapter 9
COM 371:Options	9-Mar-23	Slides
COM 371:Capital budgeting and NPV	14-Mar-23	Chapter 13
COM 371:Capital budgeting and NPV	16-Mar-23	Chapter 13
COM 371:Cost of Capital	21-Mar-23	Chapter 20
<b>KMPG -no class</b>	23-Mar-23	
COM 371:Review Class/Problem Solving	28-Mar-23	
COM 371:Current Issues	30-Mar-23	Slides
COM 371:Investing Class	4-Apr-23	Slides
COM 371:Course Review	6-Apr-23	

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



## COM 400 A01

### Strategic Management Spring 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	Tuesday and Thursday – 11:30am – 13:00pm
Location	DSB C116
Instructor:	Aloysius Newenham-Kahindi, PhD
Office:	BEC 240
Office hours:	16:00pm – 17:30pm at BEC240 <i>By prior appointment. Please email me and I will work with your schedule to ensure that I meet with you.</i>
Telephone:	1-250-472-5698
Email:	newenhamkahindi@uvic.ca

***We acknowledge and respect the lək' wəŋen peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting  
A supportive and safe learning and working environment for all its members.***

### **Required Texts and Resources:**

Hitt, M.A., Ireland, R.D., & Hoskisson, R.E. **Strategic Management: Competitiveness and Globalization**, (Concepts & Cases) 13<sup>th</sup> edition, 2020 CENGAGE Learning, Inc. ISBN: 978-0-357-03383-8; 978-1-337-91682-0.

### **Course Objectives and Description:**

This course will have three key objectives:

First, this course is designed to give you a “top-level” view of the entire organization. You will have to consider issues that influence the competitive behavior and performance of the organization as a whole. So far in your coursework you have primarily studied business functions (e.g., accounting, finance, marketing) one at a time. This course will help you broaden your perspective so that you consider business functions from the perspective of the overall organization.

Second, we will need to learn to deal with ambiguity. Some fields present well-defined problems with right and wrong answers. This is not true of management in general and strategic management in particular. Strategic decision-makers generally deal with complex situations characterized by considerable uncertainty. The threat or opportunity is rarely obvious and it's not always clear which is which. **Strategy** is, fundamentally, *about the future and the future is always unknown*. This course will help you develop knowledge for dealing with ambiguity and assist you in identifying and evaluating alternative courses of action.

Third, we will learn to work in teams as most managers work as part of teams. This term, some of your work will be done in teams, except for tests and in-class assignments. Learning to work productively as part of a team is a key managerial skill that we will work to develop this term. Thus,

students will be encouraged to hone their teamwork skills through communication (e.g. written and spoken, and using various design skills to bring about solutions).

### **Course Format:**

To achieve these objectives, we will work on integrating two essential parts of management: knowing and doing. The “**knowing**” part involves using cases, readings, and discussions to learn the basic concepts and techniques of strategic management. The “**doing**” part involves your active group participation as well as your in-class discussion.

NOTE: To ensure that you stay with real world organizational issues, I strongly recommend that you engage with The Economist, Business Week, or any other similar business media outlet.

To prepare for class, please start by reading the relevant text book chapter (see schedule below). Sometimes, if time permits, I will post videos on Brightspace that will provide additional context and nuance to the text book material. This will be available for you to view and prepare for class. During class sessions, we will start by quickly revisiting the text content and then apply the material to specific mini cases or experiential exercise. Many of these video will involve you as an individual and in group work to allow you to discuss the relevant issues for discussion purposes.

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

### **Educational Technology**

I will use a variety of educational technologies. The use of technology is part of your engagement at the University. Unfortunately, using these technologies does not come without risks and costs. In particular, some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada. I encourage you to read the privacy policy and the terms of use, and the list of the personal data stored outside of Canada for each of these technologies. However, for our in-class experiential exercises, we will specifically use Microsoft Forms at **forms.office.com**. It's a tool that's already included within Office 365 and is already compliant with UVic Privacy and Security policies and FIPPA, at:

Microsoft Forms- at **forms.office.com**

You need to know that UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

## Evaluation Elements:

**Individual Assignment:** The individual assignment will be based on a short essay (**maximum 5 pages** single space Times Romans style) – where students will be given a question – from any chapter assigned by the professor to each student - and then write a strategy design and solution to a problem. The essay will seek a **very high standard work** from each student. **A student will earn up to 20% in total for executing solutions.** Instruction will be provided later during the term.

**Class Participation:** Students will be assessed and earn marks toward their final grade based on their consistent engagement and contribution to all sessions' activities (e.g. discussion face-to-face sessions, team exercises etc...). So it is important that you show up in **each class** and respond face-to-face questions in class and you will be awarded (subjectively assessed) for excellent answers at .05% every week. The cumulative final grade for this individual participation will be the aggregation of the **ten best results students earned in the 12 face-to-face sessions (10 x up to 0.5 = up to 5%)**.

**Quizzes:** Students will also be evaluated and earn marks towards their final grade in this course based on their performance in four (**3 x 15 = 60 + 20 = 65%**) Quizzes covered by the required reading. These Quizzes are simply multiple-choice and short problem solving problems, all done in class, assessing how the students have understood all the concepts learned in class (e.g. required readings and in-class discussions/activities).

**Group Work:** The purpose of group work essay (**2-3 students in each group, 7 pages single spaced Times Romans**) is to enhance your skill in working collaboratively. The group work will seek **a very high standard quality**. When a group based assignment forms part of your evaluation for a grade, all members of the group will receive the same grade. Any exception to this policy, such as adjustments for relative contribution, will be specified in writing prior to the grading of the assignment. **In total, students will be awarded 10% for group assignment. Instruction for group work will be provided later during the term.**

All members of the group will generally receive the same grade. However, an adjustment for relative contribution can be made, at the discretion of the instructor, if the remaining members of the group specify that one or more individuals did not participate in any meaningful way. This discretion may result in a student receiving a much lower grade than the other group members. At the end of the term, the group must complete an assessment which specifies what each person's contributions were to all group work during the class and the instructor shall take this into consideration when assigning grades.

Students will be evaluated according to the following schedule:

Title (begin with Course Code)	Individual or Group	Type (Exam, Hand- in Assignment, Presentation, Quiz, Other)	Due Date (m/d/yyyy hh:mm AM/PM)PST	Weight / %of grade	Description
COM 400: Term Assignment #1	Individual	Hand-in Assignment	4/04/2023 11:30AM	20%	Essay: Problem solving and solution implementation
COM 400: Class Participation	Individual	Other	Daily in class and in group activities 11:30AM – 1:00PM	5%	Daily assignment questions(DAQ) as per chapter
Com 400: Test 1	Individual	Quiz	01/24/2023 11:30AM- 1:00PM	20%	Test covering chapters 1, 2
COM 400: Test 2	Individual	Quiz	02/09/2023 11:30AM –	15%	Test covering chapters 3, 4

			1:00PM		
COM 400: Test 3	Individual	Quiz	03/07/2023 11:30AM – 1:00PM	15%	Test covering chapters 5, 6
COM 400: Test 4	Individual	Quiz	03/30/2023 11:30AM – 1:00PM	15%	Test covering chapters 7, 8, 9
COM 400: Term Assignment #2	Group	Hand-in Assignment	4/06/2023 11:30AM	10%	Essay: Problem solving and solution implementation
Total				100%	

**There will be no final exam.**

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

**Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

**Course Assessment:**

Description of evaluation standards for evaluation elements.

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty."

**What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of **2%** for each day an assignment is late.

Attendance and Participation: Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g. illness) which interfere with their academic obligations.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grade s	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

### **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- Paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- Accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### Schedule Summary:

Title (begin with Course Code)	Type (Case, Example, Reading, Supplemental Reading, Other)	Due Date (m/d/yyyy hh:mm AM/PM)	Description
COM 400: Read for class	Reading	01/10/2023 11:30 AM	Chapter 1: Strategic Management and Strategic Competitiveness
COM 400: Read for class	Reading	01/12/2023 11:30AM	Continuation as above
COM 400: Read for class	Reading	01/17/2023 11:30AM	Chapter 2: The External Environment
COM 400: Read for class	Reading	01/19/2023 11:30AM	Continuation as above
<b>COM 400: Read for class</b>	<b>Test 1</b>	<b>01/24/2023 11:30AM</b>	<b>Chapters covered 1, 2</b>
COM 400: Read for class	Reading	01/26/2023 11:30AM	Chapter 3: The Internal Organization
COM 400: Read for class	Reading	01/31/2023 11:30AM	Continuation as above
COM 400: Read for class	Reading	02/02/2023 11:30AM	Chapter 4: Business Level Strategy
COM 400: Read for class	Reading	02/07/2023 11:30AM	Continuation as above
<b>COM 400: Read for class</b>	<b>Test 2</b>	<b>02/09/2023 11:30AM</b>	<b>Chapters covered 3, 4</b>
COM 400: Read for class	Reading	02/14/2023 11:30AM	Chapter 5: Competitive Rivalry and Competitive Dynamics
COM 400: Read for class	Reading	02/16/2023 11:30AM	Continuation as above
<b>READING BREAK: February 20<sup>th</sup> – 24<sup>th</sup></b>			
COM 400: Read for class	Reading	02/28/2023 11:30AM	Chapter 6: Corporate Level Strategy
COM 400: Read for class	Reading	03/02/2023 11:30AM	Continuation as above
<b>COM 400: Read for class</b>	<b>Test 3</b>	<b>03/07/2023 11:30AM</b>	<b>Chapters covered 5, 6</b>
COM 400: Read for class	Reading & Individual	03/09/2023 11:30AM	<b>-Individual essay instruction given in class</b> -Chapter 7: Merger and Acquisition Strategies
COM 400: Read for class	Reading	03/14/2023 11:30AM	Continuation as above
COM 400: Read for class	Reading & Group	03/16/2023 11:30AM	<b>-Group essay instruction given in class</b> -Chapter 8: International Strategy
COM 400: Read for class	Reading	03/21/2023 11:30AM	Continuation as above
COM 400: Read for class	Reading	03/23/2023 11:30AM	Chapter 9: Cooperative Strategy



COM 400: Read for class	Reading	03/28/2023 11:30AM	Continuation as above
<b>COM 400:Read for class</b>	<b>Test 4</b>	<b>03/30/2023 11:30AM</b>	<b>Chapters covered 7, 8, 9</b>
COM 400: Read for class	Individual	04/04/2023 11:30AM	Essay consultation & submission
COM 400: Read for class	Group	04/06/2023 11:30AM	Essay consultation & submission

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



## COM 402 A01

### Legal Issues in Management

#### Spring 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.	
Course hours (PST)	Tuesday and Thursday 4:30-5:50 PM
Location	Engineering Computer Science Building Room #108
Instructor:	Richard Fyfe
Office:	
Office hours:	Office Hours in person or by ZOOM, prior to or after classes or at another time, by prior arrangement.
Email:	rfyfe@uvic.ca

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***UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.***

#### **Introduction:**

Welcome to COM 402 everyone! I look forward to meeting everyone and spending the term discussing legal issues as they relate to business. I have a B.Com, LLB and MBA. I am also presently working on an LLM. I was Deputy Attorney General for BC until retiring in February 2022. This is my first time teaching this course although I have previously taught Ethics and Professionalism in the Law Faculty and have also taught Labour Law at another university.

#### **Texts and Resources:**

John A. Willes, John H. Willes, Contemporary Canadian Business Law, 12<sup>th</sup> Edition, (McGraw Hill, 2020, ISBN# [978]-1-25-965489-3.)

12<sup>th</sup> e-book edition available from bookstore. Hardcopy editions by the same author from any source are also recommended and very good value. Please cite the 12th edition if you reference the textbook in coursework or project work.

#### **Course Objectives and Description:**

From the University of Victoria Calendar:

"This course examines several aspects of commercial law that are particularly relevant to those who own, manage, or are employed by a business enterprise.

Subjects that will be addressed include common law doctrines (such as contract and negligence), legislation (such as the Employment Standards Act and the Company Act) and other legal principles that affect business decision making in a global environment."

This course is primarily concerned with law as it affects business. While there is no self-contained law of business, the course will examine areas of law which impact business.

Principal topics include, an introduction to the Anglo-Canadian system of law, the law of tort and negligence, the law of contract, the law of principal and agent, and legal forms of business: sole proprietorship, partnership and corporation. The respective liability of the principals of each form of business will also be considered.

### **Course Format:**

Instruction will principally consist of class lectures and discussion on each topic supported by questions posed to the class. It is essential that students read ahead in order to be able to follow the content and participate in practice questions and discussions.

Chapter notes, power point slides and other materials are posted in Brightspace.

Participation in other forms and by other means, such as contribution to discussion questions, assistance to class members will be encouraged and acknowledged.

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

### **Evaluation Elements:**

Students will be evaluated according to the following schedule:

As part of the participation in the course, teams of four (or five with permission) students will be responsible for three group assignments:

(Group Assignment #1) each group will be assigned a legal case to brief in written form according to a method provided and present to the class for discussion; [Written materials 15%; Class presentation 15% - total 30%]

(Group Assignment #2) each group will be required, for their assigned class, to bring one discussion item from current events (within the past 2 years) related to a topic being covered in class. [10%]

(Group Assignment #3) Citation Exercise: Each group will receive a list of 10 citations (case law, statutes, regulations, tribunal decisions) and will be required to find the item

using one of the resources discussed in class and provide: case name or statute/regulation name, and brief (1-2 sentences) description of the item. [15%]

Other evaluations include three quizzes on February 2, 2023, March 2, 2023 and April 6, 2023. [15% each quiz –total 45%]

<b>Title (begin with Course Code)</b>	<b>Individual or Group</b>	<b>Type (Exam, Hand- in Assignment, Presentation, Quiz, Other)</b>	<b>Due Date (m/d/yyyy hh:mm AM/PM)PST</b>	<b>Weight / %of grade</b>	<b>Description</b>
COM402: Group Assignment #1a	Group	Hand-in Assignment	Various	15%	See above
COM 402Group Assignment #1b	Group	Presentation	Various	15%	See above
COM 402Group Assignment #2	Group	Presentation	Various	10%	See above
COM 402Group Assignment #3	Group	Hand In Assignment	04/06/2023 4:30 PM PST	15%	See above
COM 402Quiz #1	Individual	Quiz	02/02/2023 4:30-5:50PM PST	15%	See above
COM 402Quiz #2	Individual	Quiz	03/02/2023 4:30-5:50PM PST	15%	See above
COM 402Quiz #3	Individual	Quiz	04/06/2023 4:30-5:50PM PST	15%	See above
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

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## **Course Assessment:**

Description of evaluation standards for evaluation elements.

**Group Work:** At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
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3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

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**Attendance and Participation:** Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

**Missed Coursework or Assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.

## **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grade s	Grade Point Value	Description
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73 – 76	B	5	
70 – 72	B-	4	

65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
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“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

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- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- Accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor’s consent and cannot sell or profit from the instructor’s intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

#### **Group Projects and Group Work**

Students should be aware that group projects are subject to the same rules regarding academic dishonesty. Because of the unique nature of group projects, all group members should exercise special care to ensure that the group project does not violate the policy on Academic Integrity. Should a violation occur, group members may be held jointly accountable unless the violation can be attributed to a specified individual or individuals. Some courses, while not requiring group

projects, encourage (or at least do not prohibit) students to work together in groups before submitting individual assignments. Students are encouraged to discuss this issue as it relates to academic integrity with their instructor to avoid violating this policy.

### **Schedule Summary:**

A detailed list of suggested readings are listed in the Brightspace site for this course (COM 402).

Reading, Topics List and Important Dates ( dates approximate ).

Dates subject to change Topics and Activities

Page references are for: Willes, Contemporary Canadian Business Law, e-book / 12th edition. Comparable pages for 11<sup>th</sup> Edition provided on Brightspace. In addition, access to PowerPoint slides and supplemental material will be available on Brightspace.

<b>Week/Date</b>	<b>Lesson Plan</b>
1/ January 10	<p><b><i>Introductions, Housekeeping, Discuss Evaluations, Explain readings, Brightspace and Discuss Assignments and Group Formation.</i></b></p> <p><b><i>Begin Overview of Legal Environment. Rights vs. Privileges, Role of Law, Early Development of Law, Constitution, Division of Powers</i></b></p> <p>READ: Willes (12 ed.) Chapter 1</p> <p>Pages 1-6[ stop just before “The Early Development of Law”]  Pages 9-10 [ read at “The Sources and Components ...” stop at “Canon Law”]  Pages 12-13 [ read “Statute Law”, Aboriginal and Indigenous Law, and stop at Quebec’s Civil Code” ]  Pages 16-27 [“The Constitutional Foundations of Canadian Law”, “The Canadian Charter of Rights and Freedoms”, “Classification of Laws”]  Pages 28-29 [ review questions and problems ]</p>
1/ January 12	Continue/ Finish Overview of Legal Environment, Review Questions
2/ January 17	<p><b><i>The Judicial System and Alternative Dispute Resolution</i></b></p> <p>READ: Willes (12 ed.) Chapter 2</p> <p>Page 30-31 [Introduction],</p> <p>33-34 [ The Structure of the Judicial System - stop before Criminal Courts ],</p> <p>44-47[ Court Costs to Law Reports ],</p> <p>48-51 [ Alternative Dispute Resolution to Indigenous Justice Systems ],</p> <p>54-56 [ Summary] and [ Review Questions only for Information ]</p>
2/ January 19	Continue and finish Judicial System and Alternative Dispute Resolution, Review Questions
3/ January 24	<p><b><i>Intentional Torts</i></b></p> <p>READ: Willes (12 ed.) Chapter 4</p> <p>Pages 69-83 [“Tort Law Defined”, The Development of Tort Law”, “Intentional Interference with the Person”, Intentional Interference with</p>

Week/Date	Lesson Plan
	Land and Chattels", stop at "Business-Related Torts and Crimes", and 88 ["Summary"]
3/ January 26	Continue Intentional Torts
4/ January 31	Review, Questions and Practice Quiz
4/ February 2	Quiz #1—Legal Environment through to and including Judicial System  Continue Intentional Torts
5/ February 7	<b><i>Finish Intentional Torts, Review Questions and Begin Negligence and Unintentional Torts</i></b>  READ:  Pages 93-99["Negligence", stop before Res Ipsa], 101-102["Manufacturer's Liability/ Product Liability" stop before "Nuisance"] and 104-111["General Tort Defences", "Tort Remedies", and "Summary"]
5/ February 9	Continue Negligence and Unintentional Torts
6/ February 14	Continue Negligence and Unintentional Torts
6/ February 16	Finish Negligence and Unintentional Torts; Begin Contract Law  READ: Willes (12 ed.) Chapter 5  Pages 134-152 ["Introduction", "Historical Development of the Law of Contract", "The Elements of a Valid Contract", "The Intention to Create a Legal Relationship", "Offer and Acceptance", "Electronic Offer"]  Page 153["Summary"]
7/ February 21	READINGWEEK
7/ February 23	READINGWEEK
8/ February 28	Practice Quiz, Solutions posted to Brightspace
8/ March 2	Quiz #2
9/ March 7	Review Quiz, Continue Contract Law  READ: Willes (12 ed.) Chapter 8  Pages 158 - 168 ["Consideration" to "Quantum Meruit" stop before "The Debtor-Creditor Relationship", and  Page 170– 172["Equitable or Promissory Estoppel", and "Summary"]
9/ March 9	Finish Contract Law (Agency)  READ: Willes (12 ed.) Chapter 15  Pages 310-325 ["The Role of an Agent", "Historical Development of the Law of Agency", "The Nature of the Relationship", "Ratification of Contracts by a Principal", "Third Parties and the Agency Relationship", "Liability of Principal and Agent to Third Parties in Tort", "Termination of the Principal-Agent Relationship" and "Summary"]
10/ March 14	Sole Proprietorship and Partnership  READ: Willes (12 ed.) Chapter 16  Pages 331- 334 ["Forms of Business Organization", "Historical Development of Partnership", "Nature of a Partnership", "Liability of a Partnership for Acts of a Partner", "Liability of a Partnership for the Acts of its Employees", "Rights and Duties of Partners to One Another", "Dissolution of a Partnership", stop at "Limited Partnership"]



Week/Date	Lesson Plan
	348["Summary"]
10/March 16	Corporation Law  READ: Willes (12 ed.) Chapter 17  Pages 353- 358 ["Introduction", Historical Development of the Corporation", "The Nature of a Corporation",  366 – 372 ["Division of Corporate Powers, stop before "Corporate Compliance and Director's Obligations – Impact in Canada of U. S. Law"]  p. 379-380["Summary"]
11/March 21	Group 1, 2 & 3 Presentation
11/March 23	Group 4, 5 & 6 Presentation
12/March 28	Group 7, 8 & 9 Presentation
12/March 30	Group 10, 11 & 12 Presentation
13/April 4	Review Class
13/April 6	Quiz #3

6 April Last Day of Classes

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



## ENT 100 (A01,A02,A03)

### Spring 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	Monday and Thursday A01 – 1:00 - 2:30 pm A02 – 2:30 - 4:00 pm A03 – 4:30 - 6:00 pm
Location	DSB C112
Instructor:	Diego M Coraiola
Office:	BEC 144
Office hours:	Fridays 2-4pm (Appointments only).
Email:	dcoraiola@uvic.ca

***We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.***

### **Introduction:**

This is a course to help you rethink who you are, what you are able to do, and what you want for your future. It will provide a safe space to question and discuss some of our preconceptions about the world and will offer a number of tools that you may use to reshape your beliefs and capabilities to work towards achieving your goals. This course will give you an overview of entrepreneurship as a modern form of life. Together, we will learn about the role of entrepreneurship in contemporary society, the meaning and the making of an entrepreneur, as well as the process, tools, and outcomes of entrepreneurial action. Whether you consider yourself entrepreneurship material or not, this course will offer an opportunity for self-reflexivity and self-discovery with potential impacts on your career choice and the way you see the future of your professional life.

### **Texts and Resources:**

There is no assigned textbook for this course. All the required and suggested readings are available on Brightspace. You are also encouraged to read outside of the course and bring your insights from additional readings to the classroom.

### **Course Objectives and Description:**

This course will provide a critical introduction to the theory and practice of entrepreneurship. We will begin with a brief historical exploration of the development of entrepreneurship and its importance

for today's world. We will discuss the meaning and forms of entrepreneurial action and how people become entrepreneurs. We will then explore entrepreneurship as a set of practices that include ideating, strategizing, resourcing, executing, and leveraging. We will focus particularly on the first two set of entrepreneurial practices and explore some of the tools and best practices for ideating and strategizing. During the course, you will have the opportunity to engage with and learn first-hand from the experience of several entrepreneurs and to reflect upon your own expectations for your future career based on their lived lessons.

This course adopts a student-centered approach. This means that the role of the professor in class is to facilitate the development of students' knowledge. The students are responsible for engaging with the readings, developing the assignments, and contributing to the good development of the course.

At the end of this course the students should be able to:

- Define and explain what entrepreneurship is and some of its various manifestations
- Express a critical perspective about the role of entrepreneurship in society
- Understand Victoria's entrepreneurial ecosystem
- Cultivate the development of entrepreneurial ideas
- Assess the quality and viability of an entrepreneurial idea
- Prototype and test the feasibility of their ideas
- Estimate the resources necessary to develop their ideas
- Plan the implementation of their ideas
- Pitch their ideas to potential investors

### **Course Format:**

This course follows a multi-format approach that includes:

- Self-study through curated readings and videos
- In-class and online lectures
- Class discussions and activities
- External speakers

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

### **Educational Technology**

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

For this course we will not be using any educational technologies that stores or accesses your personal information outside Canada. Should this situation change, you will be promptly informed. Any technologies used have the sole purpose of enhancing your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and will be available at the website of the technology provider. I encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

### **Evaluation Elements:**

The assignments for this course were distributed throughout to minimize overload and maximize your ability to manage your deliveries and achieve your desired grades. However, you should still plan your schedule ahead of time and balance the demands from other courses to avoid feeling too overwhelmed. You can start early most of the assignments for this course – and I recommend you do that – and refine your drafts during the semester. In addition to the instructions available on Brightspace, you have also several readings and videos that can help you initiate your assignments. Reach out to the instructor in case you have any questions.

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type	Due Date	Weight	Description
Assignment #1: Interview with Founder	Individual	Hand-in Assignment	Feb 9	15%	Report (300-words)
Assignment #2: Idea Journal	Individual	Hand-in Assignment	Feb 27	15%	Report 3out of 30ideas (450-words)
Assignment #3: Paperclip Challenge	Group	Oral Presentation	Mar 16	15%	In-class presentation
Assignment#4: Pitch-in Video	Group/ Individual	Online Submission	Mar 27	20%	90-seconds video Feedback colleagues
Assignment #5: Business Model Canvas	Group	Hand-in Assignment	Apr 6	25%	5-page limit (1000-words)
Assignment#6: Participation	Individual	In-class behaviour	Ongoing	10%	Earned through class engagement
Total				100%	

\*These are the only marks available for this course. There will be no extra marks in addition to the ones listed in the table.

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Please complete your CES after you have submitted your Assignment #5. That assignment is meant to bring together what you have learned throughout the course and you should be in a good position to evaluate your course experience then. Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

### **Course Assessment:**

Description of evaluation standards for evaluation elements.

**Assignments:** There will be six assignments in this course. The grades for the assignments were distributed to balance the advantages of group work with the opportunities for individual distinction. A grading rubric for each assignment is provided on Brightspace. If you still have questions about any of the assignments, please make sure you bring them to my attention in class, through email, or during my office hours.

**Group Work:** At the Gustavson School of Business team projects and assignments are an integral component to student learning. The purpose of group work is to enhance your skill in working collaboratively. Since the creation of any venture is a collaborative process, I see group work as an important skill that you need to develop throughout the course. Students are expected to work together, to participate equally, and to share equitably in the workload. Social loafing will not be tolerated. As your instructor, I reserve the right to lower any student's mark by one or more letter grades should a student not contribute equally to the team's task or assignment. If any such problems arise in your group, you are responsible for notifying me *sooner than later*, either in person or by email. Do not wait to notify me at the last minute or after delivering your assignment. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility.

#### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

**Late Work:** In the absence of a medical or family emergency there will be a grade penalty of 30% for late assignments plus an additional penalty of 5% for every week an assignment is late.

**Attendance and Participation:** Regular attendance is an expectation for Commerce classes. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

This is a student-directed, hands-on course in which proactivity and participation are an integral part of the learning process. A core component of this course is the presence of entrepreneurs and panel experts throughout the lectures. Students are expected to actively research guest speakers and their companies prior to their presentations, and to engage with guest speakers in class and online depending on the situation. In addition, students are encouraged to approach our weekly meetings as opportunities to enhance their learning by interacting with the instructor and with their classmates.

Students with unexcused absences\* from more than 3 class sessions will have their grade reduced by 5%. In addition, students with unexcused absences from more than 5 class sessions may not be permitted to submit Assignment #5, which is required for students to pass this course.

\*unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grade s	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Note that it is required that you pass Assignment #5 to pass this course. In the case that you do not attain a passing grade in this assignment, it will result in a final course grade of Incomplete (N), with the maximum possible percentage of grade of 49.

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

### **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- Accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### **Schedule Summary:**

ENT100	Type	Due Date	Description
ENT100Week1A	See Brightspace	Jan 9	<b>Contents</b> Introduction to the Course  <b>Prep</b> <ul style="list-style-type: none"> <li>• Read: Syllabus</li> <li>• Watch: <a href="#">Business is about Purpose</a></li> </ul> <b>Activity</b> <ul style="list-style-type: none"> <li>• Instructor explains Interview with Founder</li> </ul>
ENT100Week1B	See Brightspace	Jan 12	<b>Contents</b> What is Entrepreneurship?  <b>Self-study</b> <ul style="list-style-type: none"> <li>• Read: Dees_Meaning of Social Entrepreneurship</li> <li>• Watch: <a href="#">Entrepreneurship to change the world</a></li> </ul> <b>Activity</b> <ul style="list-style-type: none"> <li>• Defining your entrepreneurial self</li> </ul>
ENT100Week2A	See Brightspace	Jan 16	<b>Contents</b> The Context of Entrepreneurship  <b>Self-study</b> <ul style="list-style-type: none"> <li>• Read: Victoria Is a City of Entrepreneurs</li> <li>• Read: Bhargava-2020</li> <li>• Watch: <a href="#">Don't Be an Entrepreneur</a></li> </ul>

ENT100Week2B	See Brightspace	Jan 19	<b>Speaker</b> The Victoria's Ecosystem
ENT100Week3A	See Brightspace	Jan 23	<b>Contents</b> Entrepreneurship as Theorization  <b>Self-study</b> <ul style="list-style-type: none"> <li>Read: <a href="#">The Theory of the Business</a></li> <li>Watch: <a href="#">The Scientific Method</a></li> </ul>
ENT100Week3B	See Brightspace	Jan 26	<b>Contents</b> Ideating – Coming up with an idea I  <b>Self-study</b> <ul style="list-style-type: none"> <li>Read: <a href="#">Becoming an Idea Machine</a></li> <li>Watch: <a href="#">Habits of Original Thinkers</a></li> </ul> <b>Activity</b> <ul style="list-style-type: none"> <li>Instructor explains Idea Journal</li> </ul>
ENT100Week4A	See Brightspace	Jan 30	<b>Contents</b> Ideating – Coming up with an idea II  <b>Self-study</b> <ul style="list-style-type: none"> <li>Read: The Essence of Ideas (Brightspace)</li> <li>Watch: <a href="#">The art of innovation</a></li> </ul>
ENT100Week4B	See Brightspace	Feb 2	<b>Speaker</b> Building a business from an idea  <b>Self-study</b> <ul style="list-style-type: none"> <li>Watch: <a href="#">Zero Equals One</a></li> <li>Watch: <a href="#">Purpose-driven companies are thriving</a></li> </ul>
ENT100Week5A	See Brightspace	Feb 6	<b>Contents</b> Ideating – Converting ideas in opportunities  <b>Self-study</b> <ul style="list-style-type: none"> <li>Read: <a href="#">The Customer Development Model</a></li> <li>Watch: <a href="#">How to plan an MVP?</a></li> </ul>
ENT100Week5B	See Brightspace	Feb 9	<b>Contents</b> Ideating – Developing the idea  <b>Self-study</b> <ul style="list-style-type: none"> <li>Read: Value Proposition Canvas (Brightspace)</li> <li>Watch: <a href="#">Ideas &amp; Opportunities</a></li> </ul> <b>Assignment</b> Founder Interview Due
ENT100Week6A	See Brightspace	Feb 13	<b>Contents</b> Ideating – Customer development  <b>Self-study</b> <ul style="list-style-type: none"> <li>Read: <a href="#">The Customer Development Model</a></li> <li>Watch: <a href="#">Ideas &amp; Opportunities</a></li> </ul>
ENT100Week6B	See Brightspace	Feb 16	<b>Speaker</b> Converting ideas in opportunities
ENT100Week7A	See Brightspace	Feb 20	<b>Reading Week</b>
ENT100Week7B	See Brightspace	Feb 23	<b>Reading Week</b>



ENT100Week8A	See Brightspace	Feb 27	<p><b>Contents</b> Ideating – Validating the idea</p> <p><b>Self-study</b></p> <ul style="list-style-type: none"> <li>• Read: Create your MVP Prototype (Brightspace)</li> <li>• Watch: <a href="#">Experiment Board Tutorial</a></li> </ul> <p><b>Assignment</b></p> <ul style="list-style-type: none"> <li>• Idea Journal Due</li> </ul> <p><b>Activity</b></p> <ul style="list-style-type: none"> <li>• Shop around for 4-6 partners (names by Mar 2)</li> </ul>
ENT100Week8B	See Brightspace	Mar 2	<p><b>Contents</b> Strategizing – Market and Positioning</p> <p><b>Self-study</b></p> <ul style="list-style-type: none"> <li>• Read: <a href="#">Strategy for Start-ups</a></li> <li>• Watch: <a href="#">Going from Zero to One</a></li> </ul> <p><b>Activity</b></p> <ul style="list-style-type: none"> <li>• Group member names (4-6 members)</li> <li>• Instructor explains Paperclip Challenge</li> </ul>
ENT100Week9A	See Brightspace	Mar 6	<p><b>Contents</b> Strategizing – Business Model Canvas P1</p> <p><b>Self-study</b></p> <ul style="list-style-type: none"> <li>• Read: Business Model Canvas (Brightspace)</li> <li>• Watch: <a href="#">Business Model Canvas Explained</a></li> </ul>
ENT100Week9B	See Brightspace	Mar 9	<p><b>Speaker</b> Strategizing your business</p>
ENT100Week10A	See Brightspace	Mar 13	<p><b>Contents</b> Strategizing – Business Model Canvas P2</p> <p><b>Self-study</b></p> <ul style="list-style-type: none"> <li>• Read: The Lean Start-up Changes Everything</li> <li>• Watch: <a href="#">Why do start-ups succeed?</a></li> </ul> <p><b>Activity</b> Instructor explains Pitching and BMC</p>
ENT100Week10B	See Brightspace	Mar 16	<p><b>Contents</b> Resourcing – Building a Team</p> <p><b>Self-study</b></p> <ul style="list-style-type: none"> <li>• Read: Stages of Team Development</li> <li>• Watch: <a href="#">The Power of Deliberate Creative Teams</a></li> </ul> <p><b>Assignment</b></p> <ul style="list-style-type: none"> <li>• Paperclip Challenge report</li> </ul>
ENT100Week11A	See Brightspace	Mar 20	<p><b>Contents</b> Resourcing – Financing &amp; Pitching</p> <p><b>Self-study</b></p> <ul style="list-style-type: none"> <li>• Skim: <a href="#">Startup &amp; Scale-up Funding</a></li> <li>• Read: Slide bean Startup Funding Story</li> <li>• Watch: <a href="#">Startup Funding 1</a> and <a href="#">Startup Funding 2</a></li> <li>• Read: Kamps-2020-Pitch Perfect</li> <li>• Watch: <a href="#">How to Create a Pitch Deck</a></li> </ul>

ENT100Week11B	See Brightspace	Mar 23	<b>Contents</b> Executing– Pivoting  <b>Self-study</b> <ul style="list-style-type: none"> <li>• Read: Ries-2011-Pivot (Brightspace)</li> <li>• Watch: <a href="#">The power of entrepreneurial pivoting</a></li> </ul>
ENT100Week12A	See Brightspace	Mar 27	<b>Speaker</b> Creating Firm & Patenting  <b>Assignment</b> <ul style="list-style-type: none"> <li>• Pitch-in Due</li> </ul>
ENT100Week12B	See Brightspace	Mar 30	<b>Contents</b> Leveraging–Exiting and Scaling  <b>Self-study</b> <ul style="list-style-type: none"> <li>• Read: <a href="#">Why Entrepreneurs Don't Scale</a></li> <li>• Read: <a href="#">To Sell or Not to Sell?</a></li> <li>• Watch: <a href="#">How can startups scale up?</a></li> <li>• Watch: <a href="#">How do startup exits work?</a></li> </ul>
ENT100Week13A	See Brightspace	Apr 3	<b>Contents</b> Leveraging – Enduring  <b>Self-study</b> <ul style="list-style-type: none"> <li>• Read: <a href="#">Founder-Led Companies Outperform</a></li> <li>• Watch: <a href="#">How to build a business that lasts 100 years</a></li> </ul>
ENT100Week13B	See Brightspace	Apr 6	<b>Contents</b> Wrap-up  <b>Self-study</b> <ul style="list-style-type: none"> <li>• Read: <a href="#">How Will You Measure Your Life?</a></li> <li>• Watch: <a href="#">What they don't tell you</a></li> </ul> <b>Assignment</b> <ul style="list-style-type: none"> <li>• BusinessModelCanvas Due</li> </ul>

Note: This is a tentative course schedule. Students will be informed of any changes in dates or activities 24 hours prior to class.

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

Additional readings, videos or cases will be assigned throughout the course. Please refer to the Course Schedule for detail, and to the Brightspace course site for information about and access to these additional resources and materials.

### **Course Objectives and Description:**

"A person who never made a mistake never tried anything new." - Albert Einstein, physicist.

ENT402 is an exciting course designed to change the way you think about entrepreneurship and the way you look at yourself and the opportunities around you. You will explore entrepreneurial opportunities and human-centred problem-solving techniques, develop and test business ideas and models, and build a matrix of skills and attributes that will provide a framework for entrepreneurial success – either as an independent business owner, or as a member of an intrapreneurial team within organization. You will understand the role entrepreneurs play in society, and the economic importance of supporting entrepreneurs. You will also walk away with an understanding of your own willingness to venture, the skills you have that enable you to venture, and the experience you need to gain to be successful.

This course is not limited to those who are interested to start their own business one day. Intrapreneurship takes entrepreneurship into the corporate world. It creates a marriage between entrepreneurial creativity and corporate discipline – it allows you to accomplish more with fewer resources, cultivate relationships, and build your expertise. This course is founded on the belief that entrepreneurship is a way of thinking rather than something one does, in either an independent small business or inside a corporation.

Once you achieve a solid theoretical understanding, specific venturing skills of planning for and launching a new venture become the focus. In this course we will spend several sessions discussing ways to identify, screen and evaluate new business ideas. One of the major dilemmas facing any entrepreneur is the abundance of "good" ideas. The tougher part is deciding which of them is the "good" opportunity that warrants pursuit!

Of course, evaluating "good" ideas means talking to potential customers to gain their feedback on your great idea. You will be researching the market, learning more about the customers for your idea, and gaining valuable insight into what it would take for these people to become real customers. Learning to conduct consumer insight research is an important part of this dynamic course.

Whether you find yourself with a new venture opportunity that requires venture capital or plan to fund a start-up with your own resources, one thing appears to be certain: creating a realistic, comprehensive Business Model can significantly increase your chances of success. Throughout the course we will use a shared and clear understanding of how a start-up creates, delivers and captures value by using Business Model Canvas (Osterwalder, 2009) which represents any company in nine boxes, depicting the details of a company's product, customers, channels, demand creation, revenue models, partners, resources, activities and cost structure.

We will also explore additional relevant topics to an investigation of entrepreneurship – how to protect intellectual property, develop a formal written business plan for investors or lenders, estimate potential revenue, and operate a new business venture within the context of Canadian federal government and regulatory environments.

This course provides real world, hands-on learning on what it's like to actually start a company. This is a practical class—essentially a lab, not a theory or "book" class. The goal, within the constraints of an online classroom and a limited amount of time, is to create an entrepreneurial experience for you with all the pressures and demands of the real world in an early-stage startup.

This course will cover the above and other related topics with case studies and discussions, reading and writing assignments, instructor presentations, a series of stimulating entrepreneurial exercises, and a team project.

### **Learning Outcomes:**

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

- Evaluate entrepreneurial situations to identify good opportunities from good ideas using a variety of decision techniques
- Apply customer development research techniques to better understand potential customers and their needs and wants
- Construct minimum viable products (MVPs) to test conceptual solutions with potential customers
- Assess, critique and create business models for new ventures from a variety of industries
- Evaluate and recommend resources and sources of funding that are available for new venture start-ups
- Articulate options for protecting intellectual property from both the entrepreneur's and investor's perspective

### **Course Format:**

Section: A01/ CRN 21374	Days: Wednesdays	Time: 6:30pm –9:20pm	Location: DSBC112or Zoom
<b>*Please note*</b> This class is scheduled to run W 6:30pm – 9:20pm Pacific Time. Classes are entirely synchronous however the location may change. Some classes will be held on campus, and some will be held online via Zoom. It is your responsibility to refer to the Course Schedule to know what is happening when, what you need to prepare on your own or with your team, and when to show up on campus or online.			

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

### **Educational Technology:**

A variety of educational technology will be used in this online course including internet-based technologies or web-based applications, cloud services and/or social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which store or access your personal information outside Canada, is required for this course: Zoom Online. You will be notified if this list changes. These technologies are used to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at <https://zoom.us/privacy>. You are encouraged to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

### **Evaluation Elements:**

Students will be evaluated according to the following schedule:

Assignment #	Assignment Type	Individual or Group	Weight% of grade	Due Date
ENT402-1	Ideation Portfolio – Idea 1	Individual	10%	01/25/2023
ENT402-2	Ideation Portfolio – Idea 2	Individual	10%	02/01/2023
ENT402-3	Ideation Portfolio – Idea 3	Individual	10%	02/08/2023
ENT402-4	Customer Development Research	Individual	25%	03/08/2023
ENT402-5	Business Model Canvas Presentation	Group	15%	03/29/2023
ENT402-6	Final Written Assignment	Group	30%	04/05/2023
			100%	

If you disagree with any grade received on an assessment you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that your work may be reviewed in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade. The final grade obtained from the above marking scheme for the purpose of GPA calculation will be based on the percentage-to-grade point conversion table as listed in the current Undergraduate Calendar.

### **Course Lecture Notes:**

Unless otherwise noted, all course materials supplied to students in this course have been prepared by the instructor and are intended for use in this course only. These materials are NOT to be re-circulated digitally, whether by email or by uploading or copying to websites, or to others not enrolled in this course. Violation of this policy may in some cases constitute a breach of academic integrity as defined in the UVic Calendar.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

### **Course Assessment:**

Description of evaluation standards for evaluation elements.

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. To receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and

address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty."

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

**Late Work:** In the absence of a medical or family emergency there will normally be a grade penalty of **5%** for each day an assignment is late.

**Attendance and Participation:** Regular attendance is an expectation of the Gustavson School of Business. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

One missed class is fine, but more absences may result in downward adjustment of your grade. Students with unexcused absences from 3 or more on campus or online class sessions will have their final grade reduced by a minimum of 5%. The reasoning behind this apparently very stringent policy is that classes demand active participation and attendance.

\*unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the Brightspace course site.

**Missed Coursework or Assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.

**Preparation:** This course will be mostly on campus, however some classes will be held online. Please refer to the class schedule so you know what's happening and when. During class sessions, you should be prepared to lead off the discussion of any question in a significant way as well as to discuss salient issues which are not addressed per se in the assigned questions. As in any case discussion, it is crucial that you are well-prepared, listen carefully to others, and build on/critique previous comments. Clearly, you must participate in class if you are going to share your ideas with others. There is, however, no need to participate in every class. It is the quality of comments, not the quantity, that is germane. Occasionally, students find that it is easier to participate effectively from the point of view of a particular person or functional area, or to take on the role of devil's advocate or expert (if expertise is possessed) on the topic.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description

90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

### **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- Paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- Accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property. Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### **Online Synchronous Session Access:**

UVic Zoom online classroom access will be posted in Brightspace. Please enable Brightspace Announcement notifications by email to receive these posts by email, or please check the Brightspace course site regularly to view Announcements posted by your instructor.

### **Course Schedule:**

Module Title	Type	Date	Class Description, Required Readings and Activities
ENT402:Week 1  Course Introduction Entrepreneurship Overview	Reading  Video  Complete exercise	Wednesday, Jan 11 6:30pm–9:20pm UVic Campus – Required Attendance	Introduction to entrepreneurship What is entrepreneurship? Where do entrepreneurial ideas come from? Course overview, learning outcomes and expectations  Class 01 pp. 1-20  10 myths of entrepreneurship  Complete: Entrepreneurship self-assessment exercise, pp. 21-44
ENT402:Week 2  Opportunity Recognition	Reading  Reading  Video Video	Wednesday, Jan 18 6:30pm–9:20pm UVic Campus – Required Attendance	Opportunity Recognition – Distinguishing a good business opportunity from a good idea  Class 02pp. 45-69  What makes entrepreneurs, entrepreneurial? (Sarasvathy, 2010)  Marshalling resources Ideation Gallery assignment 1 overview Opportunity Evaluation and Quantification
ENT402:Week 3  Opportunity Evaluation and Quantification	Reading  Complete assignment	Wednesday, Jan 25 6:30pm–9:20pm UVic Campus – Required Attendance	Class 03pp. 80-112  <b>Ideation Gallery–Idea 1(10%) DUE</b>



Module Title	Type	Date	Class Description, Required Readings and Activities
ENT402:Week 4  Finding Customers	  Video  Complete assignment	Wednesday, Feb 1 6:30pm – 9:20pm Uvic Campus – Required Attendance	Finding Customers   Developing customers  <b>Ideation Gallery –Idea 2(10%) DUE</b>
ENT402:Week 5  Creating Value	  Reading  Complete assignment  Prepare exercise  Complete assignment	Wednesday, Feb 8 6:30pm – 9:20pm Uvic Campus – Required Attendance	Creating Value: Creating a value proposition Value proposition canvas explained  Class 04pp. 127-159  Customer development research assignment overview  Prepare: one value proposition canvas for one idea  <b>Ideation Gallery –Idea 3(10%) DUE</b>
ENT402:Week 6  Business Model Canvas MVP Design Lab Survey Pre- testing	  Video Video  Prepare for class	Wednesday, Feb 15 6:30pm–9:20pm Uvic Campus – Required Attendance	Business Model Canvas, MVP Design and Survey Testing   MVP/prototype testing MVP Experiment Canvas  Prepare: one business model canvas for one idea Prepare: your MVP experiment canvas Prepare: your customer survey
ENT402:Week 7 Reading Week	No class	Wednesday, Feb 22 No Class	Continue work on the Customer Development Research assignment
ENT402:Week 8  Lean Start-up	  Reading  Video Video	Wednesday, Mar 1 6:30pm – 9:20pm Uvic Campus – Required Attendance	Lean Start-up Movement   Class 05pp. 179 – 194  Lean start-up movement Overview of build-measure-learn cycle

Module Title	Type	Date	Class Description, Required Readings and Activities
ENT402:Week 9  Project Team Meetings Projects Chosen	     Complete assignment	Wednesday, Mar 8 6:30pm – 8:00pm UVic Campus – Required Attendance	Team Night  Team project and presentation assignment overview  Team meeting to select project business idea  <b>Customer Development Research (25%) DUE</b>
ENT402:Week 10  Financial Feasibility Funding and Financing	   Reading Reading	Wednesday, Mar 15 6:30pm–9:20pm UVic Campus – Required Attendance	Financial Feasibility   Class 06 pp. 201 – 230 Class 12 pp. 455 – 476
ENT402:Week 11  Field Testing MVPs	   Video Video Video	Wednesday, Mar 22 6:30pm–9:20pm Zoom Online Classroom	Testing and Validation  No assigned readings  Forms of Business Organization Elements of a formal business plan Key elements of successful plans
ENT402:Week 12  Small Business Law Writing a Formal Business Plan Social Entrepreneurship, Innovation Collaboration and New Business Locations  BMC Presentations	   Reading Reading Reading Reading  Video Video Video Video	Wednesday, Mar 29 6:30pm–9:20pm Zoom Online Classroom Team Presentation Schedule will be posted	Law, Business plans, social entrepreneurship, innovation and collaboration, and new business locations.  Class 09 – pp. 341 – 356 Class 11 – pp. 415 – 442 Class 15 – pp. 575 - 592 Appendices – pp. 599 – 679  Legal side of small business: IP Protection Social Entrepreneurship and Innovation Collaboration – New Business Spaces and Places  <b>Business Model Canvas Presentations(15%) DUE</b>
ENT402:Week 13  Course Wrap up		Wednesday, April 5 6:30pm – 9:20pm UVic Campus – Required Attendance	     <b>Final Written Assignment Report(30%) DUE</b>

Students with diverse learning styles and needs are welcome in this course. If you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

videos and assignments, all accessible through Brightspace. These can be done at a time that is convenient to you; however, take note of the submission deadlines (see Requirements for Graded Work below). *Synchronous* components include meeting in-person twice a week, during which will be a combination of lectures, general class discussions, break-out group discussions and activities.

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

### **Educational Technology:**

I use a variety of educational technology in this course which may include internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

### **Course Experience Survey:**

The BCom Program and its instructors value your feedback. As with all of our courses, you will be expected to complete a confidential on-line course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the Program make improvements.

To complete the CES, you will need to use your UVic Netlink ID to access the survey, which can be done on your laptop, tablet or mobile device. As well, toward the end of the course, you will also receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey if you don't do so in the time provided in class.

## **Evaluation Elements:**

Students will be evaluated according to the following elements and schedule:

<b>EVALUATIONELEMENTS</b>	<b>Weight (%)</b>	<b>Due Dates/Times</b>
Quizzes (7)	15	See Schedule below
Assignments (6)	25	See Schedule below
Class Participation	15	
Team Project <ul style="list-style-type: none"><li>• Team charter (deduction of 5%from team project grade if no submission)</li><li>• Oral presentation (10%)</li><li>• Writtenreport (20%)</li></ul>	30	<ul style="list-style-type: none"><li>• Team charter: 5pmFeb.13(Mon.)</li><li>• Oral presentations: Mar. 27, 29, Apr. 3, 5</li><li>• Written report: noon Apr. 5(Wed.)</li></ul>
Individual Final Paper	15	5 pm Apr. 12(Wed.)
<b>TOTAL</b>	<b>100 %</b>	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

## **Course Assessment:**

The following are descriptions of evaluation standards for evaluation elements.

### **Quizzes(15%)**

There are seven (7) quizzes. Unless indicated, all quizzes are based on the required reading(s) and videos. All quizzes are to be done on-line at a time convenient to you, but must be completed **no later than 1 pm** the day before the relevant class. In addition, completion of each quiz has a time limit of 15 minutes.

### **Class Preparation Assignments(25%)**

To help you better engage during class, there are six (6) assignments that need to be submitted. All assignments are individual work. Please note that collaboration on class assignments is only permitted with my permission and then only to the extent that I stipulate.

Specific instructions for each assignment will be posted on Brightspace as needed. Submit assignments through Brightspace **by 5 pm** the day before the relevant class.

Late Work: In the absence of a medical or family emergency, submissions after the deadline will have a 50% deduction from the awarded points; submissions after the class starts will not be accepted.

Assignments that show care, thought, insight and effort in completion will be awarded more than one point (up to a maximum of 5 points). This means both content and presentation (such as grammar, spelling). Keep your submissions short: no more than 3 pages (excluding any cover page, references, graphs, diagrams, tables), single line spacing, at least 10 points font size – deductions may be made for not adhering to these format requirements.

### **Class Participation (15%)**

Class participation is an effective means of understanding the concepts, principles and processes covered in the course. There are many opportunities to actively participate, such as (1) contribution

during general class and break-out group discussions; (2) oral report to the whole class of break-out group discussions, and (4) written submission of in-class activities.

Participation includes answering questions, raising points, sharing insights that contribute to a better understanding of the required readings or better awareness of the implications and issues involved; asking thought-provoking questions; sharing personal experiences to illustrate concepts and principles; sharing current news items from your reading of periodicals relevant to the topic being discussed. To actively participate requires coming to class prepared (having read all required reading assignments for the class, as well as exercise or case materials that need preparation, and having watched assigned videos). *Please note that you may be called upon during class to answer questions, share your thoughts and experiences, or report on your break-out group discussions.*

From time to time, there may be in-class exercises that will require submissions at the end of or during class. *Only submissions in class will be accepted as part of class participation, as they are a product of participating during the class.* Submissions in-class are normally done by e-mail; no submissions after the class has ended will be accepted.

### **Team Project: Assessing Country Attractiveness (30%)**

At the Gustavson School of Business, team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to BCom Program Director for initial meeting and further investigation as needed.

Please note Gustavson's standard of professional behavior when it comes to group activities ([Standards of Professional Behavior](#)):

- Credit work to all members of the group, especially when using the work for other purposes (e.g., when submitting a group report to a potential employer as a sample of your writing ability, you should cite the names of the other students who worked on the paper).
- It is unprofessional to let one or two members of the group do most of the work when the final grade or reward will be shared by the entire group as it circumvents the learning process. The group should attempt to resolve any misallocation of workload early in the process, and if difficulties persist, should seek advice from the professor or instructor as soon as possible.
- Collaboration on class assignments is only permitted with the instructor's permission and then only to the extent stipulated by the instructor. Be sure you understand the acceptable level of collaboration in each of your courses.
- We should each be a responsible and professional part of the group. This means delivering on work commitments, being prepared and on-time for meetings, and carrying an equitable workload share.
- We all deserve respect, consideration and common courtesy as members of the Gustavson School of Business. Deal with anger, tension and personality conflicts in constructive ways. Rude, insulting or disrespectful language or actions is neither professional nor appropriate.

- If group members reveal anything about themselves in confidence to other group members, and do not wish this information to be divulged outside the group, this should be respected. This would also apply to any confidential information about a third party or organization (e.g., a previous employer) that a member may divulge for group work purposes only.

More detailed information about the IB 301 team project is posted as a separate document on Brightspace in the Course Outline & Instructor section. The focus of the team project is assessing the attractiveness of the general business environment of a country that your team has chosen. Country selection is on a first-come, first-served basis; a sign-up sheet will be posted on my office door by noon on Feb. 13 (Mon.).

The team project is an opportunity to apply class concepts and to learn more about a country. As important, the team project is an opportunity to experience working in a group of diverse members much like what the workplace is, but also to develop skills in doing research (such as finding relevant and valid information or data; analyzing/interpreting the information or data according to the purpose or objective of the project), writing a report, and doing an oral presentation.

You will be assigned to groups of 4-5 members, ensuring as much diversity as possible among group members. Groupings will be announced during the **Feb. 6** class, so please be present at this class as groups will begin working then. Being present when the group first meets is an important ingredient to better group results. The purpose of group work is to enhance your skill in working collaboratively. When a group-based assignment forms part of your evaluation for a grade, all members of the group will receive the same grade. However, adjustments may be made for relative contribution through peer evaluation. Each team member must rate the participation of their teammates. Rate each teammate on the following statement: "This team member did their fair share of work in a timely and high quality manner." Use the following rating scale: 1= *Strongly Disagree*; 2= *Disagree*; 3= *Neither Disagree nor Agree*; 4= *Agree*; 5 = *Strongly Agree*. Please **submit through Brightspace by noon on Apr. 5 (Wednesday)** your assigned rating for *each* team member. Submission of this peer evaluation will be counted towards your participation mark.

There are three components to the team project: team charter, oral presentation and written report. Only the written report and oral presentation are graded. However, if your team does not submit your team charter by **5 pm on Feb. 13 (Monday)**, 5% will be deducted from the team project grade. Oral presentations will be recorded; the recordings will be seen only by me (or any designated marker for the course) for the purpose of helping to grade the oral presentation.

Oral presentations are scheduled over 4 classes: **Mar. 27, 29, Apr. 3 and 5**. Which date your team makes the oral presentation will be determined by me, on the basis primarily of ensuring a wider range of regions covered for each day. The oral presentation is worth 10%. Not all team members need to participate in the oral presentation; who and how many are to be decided by your team. However, participation in the oral presentation will be considered in your participation mark. The length of the oral presentation will be announced later, as it will depend on the actual number of teams; usually oral presentations are between 10-15 minutes with about 5 minutes for Q&A and transitions between groups. I will cut you off if you exceed the time allocated in order to give the same amount of time for all groups.

The team's written report is worth 20% and is due by **noon on Apr. 5 (Wednesday)** after the oral presentations. This allows your team to make adjustments to the written report if you wish.

**Late Work:** In the absence of a medical or family emergency, submission of the team's written report after the deadline will be given a 4% deduction from the assigned percentage grade; submissions 24 hours after the deadline will no longer be accepted, and your team will receive a grade of 0 for the written report. Appropriate documentation of the medical or family emergency must be submitted.

### **Individual Final Paper (15%)**

The individual final paper is based on the country report your team submitted, and is **due by 5 pm on Apr. 12 (Wednesday)**. This paper involves determining whether the country your team worked on is

suitable for a specific firm to enter; you will be given a list of firms to choose from. The details of the 5-10 page Individual Final Paper requirement will be released noon on Apr. 5 (Wed.) via Brightspace.

**Late Work:** In the absence of a medical or family emergency, submissions after the deadline will be given a 4% deduction from the assigned percentage grade; submissions 24 hours after the deadline will no longer be accepted, and your grade for the final paper will 0. Appropriate documentation of the medical or family emergency must be submitted.

### **Attendance**

Regular attendance is an expectation for Gustavson classes. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Let me know as soon as you can if you will be absent or have been absent due to illness, injury or family affliction; documentation may be required (within 24 hours after return to classes). These absences will be considered excused and will not count against your participation grade. For other reasons, it is also *highly appreciated* to inform me beforehand, if you will not be attending a class, will be late for class or will have to leave early.

**Missed Coursework or Assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	<b><u>Exceptional, outstanding and excellent performance.</u></b> Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	<b><u>Very good, good and solid performance.</u></b> Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	<b><u>Satisfactory, or minimally satisfactory.</u></b> These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	<b><u>Marginal Performance.</u></b> A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	<b><u>Unsatisfactory performance.</u></b> Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

*Please note:* Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Final course grades are official only after they have been approved by the BCom Program Director and may be subject to change up until that point.

### **Academic Integrity:**

As our programs help to create business and government leaders, the Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- Accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

**Schedule:** Please note that schedules are subject to change – any changes will be announced in class and through Brightspace.

DATE	TOPIC	REQUIRED All chapters refer to the textbook
Jan. 9 Mon	Introduction	<b>Read</b> <ul style="list-style-type: none"><li>• Course Outline</li><li>• Team Project Description</li></ul>
Jan. 11	Understanding Globalization	<b>Read</b> Chapter 1: The Business Enterprise in Focus



DATE	TOPIC	REQUIRED All chapters refer to the textbook
Wed		<b>Watch videos:</b> <ul style="list-style-type: none"> <li>The World Ahead 2023: five stories to watch out for (The Economist, 2022, 20 min.) <a href="https://www.youtube.com/watch?v=nv3iOH_XYdo">https://www.youtube.com/watch?v=nv3iOH_XYdo</a></li> <li>The Global Food Crisis, Explained (The Economist, 2022, 12 min.) <a href="https://www.youtube.com/watch?v=oQWaw5S4b3I">https://www.youtube.com/watch?v=oQWaw5S4b3I</a></li> </ul>
Jan. 16 Mon	The Pandemic and the Global Business Environment	<b>Read</b> Bonus Chapter: Worldwide Pandemic and the Global Business Environment ( <i>posted on Brightspace</i> )  <b>Watch videos:</b> <ul style="list-style-type: none"> <li>How humans are making pandemics more likely (Vox, 2020, 7 min.) <a href="https://www.youtube.com/watch?v=gP5CEclyk94">https://www.youtube.com/watch?v=gP5CEclyk94</a></li> <li>Will COVID kill globalization? (The Economist, 2020, 14 min.) <a href="https://www.youtube.com/watch?v=KJhlo6DtJlk">https://www.youtube.com/watch?v=KJhlo6DtJlk</a></li> </ul> <b>Prepare for discussion:</b> Read the mini-case study - How the pandemic played havoc with meat supply chains in the US (pp. 21-22 of bonus chapter). See <i>Brightspace</i> for the discussion questions.
Jan. 18 Wed	Global Business Environment	<b>Read</b> Chapter 2: Globalization and the Business Environment  <b>Submit quiz 1</b> (due 1 pm, Jan. 17)  <b>Assignment 1</b> (due 5 pm, Jan. 17): Farmacias Similares case ( <i>posted on Brightspace</i> )
Jan. 23 Mon	Corporate Social Responsibility	<b>Read</b> Chapter 11: Ethics and Social Responsibility  <b>Submit quiz 2</b> (due 1 pm, Jan. 22)  <b>Watch videos:</b> <ul style="list-style-type: none"> <li>Grameen Danone Food Project (2012, 12 min.) <a href="https://www.youtube.com/watch?v=ZDkTDcl53hg">https://www.youtube.com/watch?v=ZDkTDcl53hg</a></li> <li>Grameen Danone – The business of social innovation (2014, 20 min.) <a href="https://www.youtube.com/watch?v=SDh2otLO1-k">https://www.youtube.com/watch?v=SDh2otLO1-k</a></li> </ul> <b>Assignment 2</b> (due 5 pm, Jan. 22): Grameen Danone case ( <i>posted on Brightspace</i> )
Jan. 25 Wed	Assessing Country Attractiveness	<b>Read</b> The Process of Assessing Country Attractiveness (excerpt from Chapter 6, The International Business Environment by Hamilton & Webster, 2018) ( <i>posted on Brightspace</i> )

DATE	TOPIC	REQUIRED All chapters refer to the textbook
		<b>Watch videos:</b> <ul style="list-style-type: none"> <li>Why Finland and Denmark are happier than the U.S. (CNBC, 2020, 25 min.) <a href="https://www.youtube.com/watch?v=6Pm0Mn0jYU">https://www.youtube.com/watch?v=6Pm0Mn0jYU</a></li> <li>What the Social Progress Index can reveal about your country (2014, 15 min.) <a href="https://www.ted.com/talks/michael_green_what_the_social_progress_index_can_reveal_about_your_country?language=en">https://www.ted.com/talks/michael_green_what_the_social_progress_index_can_reveal_about_your_country?language=en</a></li> </ul>
<b>Jan. 27 Fri</b>	<b>Submit yourself-introduction on Brightspace <i>by 5pm.</i></b>	
Jan. 30 Mon  Feb. 1 Wed	Sociocultural Environment	<b>Read</b> Chapter 3: Culture and Societies  <b>Watch video:</b> The surprising workforce crisis of 2030 – and how to start solving it now (TED Talks, 2014, 13 min.) <a href="https://www.ted.com/talks/rainer_strack_the_workforce_crisis_of_2030_and_how_to_start_solving_it_now?language=en">https://www.ted.com/talks/rainer_strack_the_workforce_crisis_of_2030_and_how_to_start_solving_it_now?language=en</a>  <b>Submit quiz 3</b> (due 1 pm, Jan. 29)  <b>Assignment 3</b> (due 5pm, Jan. 29): PIGAMU case (posted on Brightspace)
Feb. 6 Mon  Feb. 8 Wed	Group Effectiveness	<b>Read</b> Forming The Team (Chapter 6, Creating Teams with An Edge, Harvard Business Essentials, 2004) <a href="http://ezproxy.library.uvic.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&amp;db=e076mww&amp;AN=674829&amp;site=ehost-live&amp;scope=site&amp;ebv=EK&amp;ppid=Page_-23">http://ezproxy.library.uvic.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&amp;db=e076mww&amp;AN=674829&amp;site=ehost-live&amp;scope=site&amp;ebv=EK&amp;ppid=Page_-23</a>  You will meet your assigned team for the team project group during class – Please make sure to attend!
<b>Feb.13 Mon</b>	<ul style="list-style-type: none"> <li><b>Submit team charter <i>by 5pm.</i></b></li> <li><b>Post your team's selected country, first come-first served; sign-up sheet on my office door will be available <i>starting noon.</i></b></li> </ul>	
Feb. 13 Mon  Feb. 15 Wed	Political Environment	<b>Read</b> Chapter 5: The Political Environment: Politics and Business Intertwined  <b>Watch videos:</b> <ul style="list-style-type: none"> <li>How bad is the crisis in democracy? (The Economist, 2020, 28 min.) <a href="https://www.youtube.com/watch?v=PWt7naYTiik">https://www.youtube.com/watch?v=PWt7naYTiik</a></li> <li>War in Ukraine: how has the world changed? (The Economist, 2022, 8 min.) <a href="https://www.youtube.com/watch?v=XXcXVt3zaVwh">https://www.youtube.com/watch?v=XXcXVt3zaVwh</a>  <a href="https://www.youtube.com/watch?v=XXcXVt3zaVw">https://www.youtube.com/watch?v=XXcXVt3zaVw</a></li> </ul> <b>Submit quiz 4</b> (due 1 pm, Feb. 12)  <b>Assignment 4</b> (due 5 pm, Feb. 12): Society's Voice Against Unilever Mercury Contamination in Kodaikanal (case in course pack)

DATE	TOPIC	REQUIRED All chapters refer to the textbook
<b>Feb. 20-24</b>	<b>Reading break(Feb. 20 –Family Day holiday)</b>	
Feb. 27 Mon  Mar. 1 Wed	Legal Environment	<p><b>Read</b> Chapter 6: The Legal Environment</p> <p><b>Submit quiz 5</b> (due 1 pm, Feb. 26)</p> <p><b>Prepare for discussion:</b> See <i>Brightspace</i> for the discussion questions.</p>
Mar. 6 Mon  Mar. 8 Wed	Technological Environment	<p><b>Read</b> Chapter 9: Technology and Innovation</p> <p><b>Submit quiz 6</b> (due 1 pm, Mar. 5)</p> <p><b>Watch videos:</b></p> <ul style="list-style-type: none"> <li>What will future jobs look like? (TED Talks, 2013, 15 min.) <a href="https://www.youtube.com/watch?v=cXQrbxD9_Ng">https://www.youtube.com/watch?v=cXQrbxD9_Ng</a></li> <li>Robots will steal your job, but that's ok (TEDx Talks, 2012, 18 min.) <a href="https://www.youtube.com/watch?v=kYlfeZcXA9U">https://www.youtube.com/watch?v=kYlfeZcXA9U</a></li> <li>The future of work: is your job safe (The Economist, 2019, 19 min.) <a href="https://www.youtube.com/watch?v=gUc5oN_ffRo">https://www.youtube.com/watch?v=gUc5oN_ffRo</a></li> </ul> <p><b>Highly recommended video:</b> The rise of AI (Bloomberg, 2018, 52 min.) <a href="https://www.youtube.com/watch?v=Dk7h22mRYHQ">https://www.youtube.com/watch?v=Dk7h22mRYHQ</a></p> <p><b>Assignment 5</b> (due 5 pm, Mar. 5): Automation: opportunities and threats (textbook, pp. 313-314). See <i>Brightspace</i> for discussion questions.</p>
Mar.13 Mon  Mar.15 Wed	Ecological Environment	<p><b>Read</b></p> <ul style="list-style-type: none"> <li>Chapter 10: Ecology and Climate Change</li> <li>Chapter 12: Sustainable Business: the Prospects</li> </ul> <p><b>Submit quiz 7</b> (due 1 pm, Mar. 12)</p> <p><b>Watch videos</b>, in this order:</p> <ul style="list-style-type: none"> <li>Let the environment guide our development (TED Talks, 2010, 19 min.) <a href="https://www.youtube.com/watch?v=RgqtrlixYR4">https://www.youtube.com/watch?v=RgqtrlixYR4</a></li> <li>Doughnut economics (RSA, 2013, 18 min.) <a href="https://www.youtube.com/watch?v=CqJL-cM8gb4">https://www.youtube.com/watch?v=CqJL-cM8gb4</a></li> <li>The economics of kindness (Creatively United for the Planet, 2020, the first 34 min.) <a href="https://www.youtube.com/watch?v=eqRif4e6ORs">https://www.youtube.com/watch?v=eqRif4e6ORs</a></li> </ul> <p><b>Assignment 6</b> (due 5 pm, Mar. 12): How did we get here and what is the way forward? See <i>Brightspace</i> for questions to answer.</p>
Mar. 20 Mon	Sustainable Development	<p><b>Prepare for discussion:</b> Revisit the Grameen Danone case. See <i>Brightspace</i> for discussion questions</p>
<b>Mar.22 Wed</b>	<b>NO CLASS: Freeday to prepare for group presentations starting next week</b>	

DATE	TOPIC	REQUIRED All chapters refer to the textbook
Mar. 27, 29, Apr. 3, 5	<ul style="list-style-type: none"> <li>Group oral presentations: date/order to be assigned</li> <li>CourseExperience Survey (CES)</li> </ul>	
Apr. 5 Wed	Submit <u>by noon</u> : <ul style="list-style-type: none"> <li>written report for the team project</li> <li>your peer evaluation</li> </ul>	
Apr. 5 Wed	Release of the detailed requirements for the Individual Final Paper <u>by noon</u> .	
Apr. 12 Wed	Submit Individual Final Paper <u>by 5pm</u> .	



## ENT 402 (A01)

### Entrepreneurship & Small Business for the Non-specialist

#### Spring, 2023 Course Outline

Note: please check the Brightspace course site frequently for updates and course changes.

Course hours (PST):	6:30pm – 9:20pm Pacific
Location:	David Strong Building C112 Black Ink Room
Zoom Online Classroom/Office Link:	Meeting ID: 848 0282 8040/ Password: 202304
Instructor:	Dr. Leslie McGeough
Office hours:	6:00pm – 6:30pm Wednesday, or by appointment. Please email me for confirmation of an appointment via Zoom.
Telephone/Text:	(250) 415 3234
Email:	lmcgeough@uvic.ca

***We acknowledge with respect the Lekwungen-speaking peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting a supportive and safe learning and working environments for all its members.***

#### **Introduction:**

Hello everyone! Welcome to Entrepreneurship for the Non-Specialist. Looking forward to meeting you all soon. I'm a two-time technology entrepreneur, and hold BComm, MBA and PhD degrees in marketing, entrepreneurship and corporate strategy. Entrepreneurship is such a fun subject to teach and to learn – it's very hands-on – and you'll get to experience the thrill of start-up processes, customer development, iterative product (or service) design and testing, and business modelling. Whether you're an entrepreneur at heart, or looking to work in an innovative organization, this is a great course to learn about the entrepreneurial mindset!

#### **Required Text:**

Title: 100 Essential Small Business Skills
Author: McGeough & Garner
Publisher/Year: Go Forth Institute/ 2021

#### **Reference Materials:**

Provided free of charge for UVic students, and available for download from the Brightspace course site

### **Additional Readings:**

Additional readings, videos or cases will be assigned throughout the course. Please refer to the Course Schedule

for detail, and to the Brightspace course site for information about and access to these additional resources and

materials.

### **Course Objectives and Description:**

"A person who never made a mistake never tried anything new." - Albert Einstein, physicist.

ENT402 is an exciting course designed to change the way you think about entrepreneurship and the way you look at yourself and the opportunities around you. You will explore entrepreneurial opportunities and human-centred problem-solving techniques, develop and test business ideas and models, and build a matrix of skills and attributes that will provide a framework for entrepreneurial success – either as an independent business owner, or as a member of an intrapreneurial team within organization. You will understand the role entrepreneurs play in society, and the economic importance of supporting entrepreneurs. You will also walk away with an understanding of your own willingness to venture, the skills you have that enable you to venture, and the experience you need to gain to be successful.

This course is not limited to those who are interested to start their own business one day. Intrapreneurship takes entrepreneurship into the corporate world. It creates a marriage between entrepreneurial creativity and corporate discipline – it allows you to accomplish more with fewer resources, cultivate relationships, and build your expertise. This course is founded on the belief that entrepreneurship is a way of thinking rather than something one does, in either an independent small business or inside a corporation.

Once you achieve a solid theoretical understanding, specific venturing skills of planning for and launching a new venture become the focus. In this course we will spend several sessions discussing ways to identify, screen and evaluate new business ideas. One of the major dilemmas facing any entrepreneur is the abundance of "good" ideas. The tougher part is deciding which of them is the "good" opportunity that warrants pursuit!

Of course, evaluating "good" ideas means talking to potential customers to gain their feedback on your great idea. You will be researching the market, learning more about the customers for your idea, and gaining valuable insight into what it would take for these people to become real customers. Learning to conduct consumer insight research is an important part of this dynamic course.

Whether you find yourself with a new venture opportunity that requires venture capital or plan to fund a start-up with your own resources, one thing appears to be certain: creating a realistic, comprehensive Business Model can significantly increase your chances of success. Throughout the course we will use a shared and clear understanding of how a start-up creates, delivers and captures value by using Business Model Canvas (Osterwalder, 2009) which represents any company in nine boxes, depicting the details of a company's product, customers, channels, demand creation, revenue models, partners, resources, activities and cost structure.

We will also explore additional relevant topics to an investigation of entrepreneurship – how to protect intellectual property, develop a formal written business plan for investors or lenders, estimate potential revenue, and operate a new business venture within the context of Canadian federal government and regulatory environments.

This course provides real world, hands-on learning on what it's like to actually start a company. This is a practical class—essentially a lab, not a theory or "book" class. The goal, within the constraints of an online classroom and a limited amount of time, is to create an entrepreneurial experience for you with all the pressures and demands of the real world in an early-stage startup.

This course will cover the above and other related topics with case studies and discussions, reading and writing assignments, instructor presentations, a series of stimulating entrepreneurial exercises, and a team project.

## **Learning Outcomes:**

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

- Evaluate entrepreneurial situations to identify good opportunities from good ideas using a variety of decision techniques
- Apply customer development research techniques to better understand potential customers and their needs and wants
- Construct minimum viable products (MVPs) to test conceptual solutions with potential customers
- Assess, critique and create business models for new ventures from a variety of industries
- Evaluate and recommend resources and sources of funding that are available for new venture start-ups
- Articulate options for protecting intellectual property from both the entrepreneur's and investor's perspective

## **Course Format:**

Section: A01/ CRN 21374	Days: Wednesdays	Time: 6:30pm – 9:20pm	Location: DSBC112 or Zoom
<b>*Please note*</b> This class is scheduled to run W 6:30pm – 9:20pm Pacific Time. Classes are entirely synchronous however the location may change. Some classes will be held on campus, and some will be held online via Zoom. It is your responsibility to refer to the Course Schedule to know what is happening when, what you need to prepare on your own or with your team, and when to show up on campus or online.			

## **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

## **Educational Technology:**

A variety of educational technology will be used in this online course including internet-based technologies or web-based applications, cloud services and/or social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which store or access your personal information outside Canada, is required for this course: Zoom Online. You will be notified if this list changes. These technologies are used to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at <https://zoom.us/privacy>. You are encouraged to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

### **Evaluation Elements:**

Students will be evaluated according to the following schedule:

Assignment #	Assignment Type	Individual or Group	Weight% of grade	Due Date
ENT402-1	IdeationPortfolio – Idea 1	Individual	10%	01/25/2023
ENT402-2	IdeationPortfolio – Idea 2	Individual	10%	02/01/2023
ENT402-3	IdeationPortfolio – Idea 3	Individual	10%	02/08/2023
ENT402-4	Customer Development Research	Individual	25%	03/08/2023
ENT402-5	Business Model Canvas Presentation	Group	15%	03/29/2023
ENT402-6	FinalWritten Assignment	Group	30%	04/05/2023
			100%	

If you disagree with any grade received on an assessment you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that your work may be reviewed in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade. The final grade obtained from the above marking scheme for the purpose of GPA calculation will be based on the percentage-to-grade point conversion table as listed in the current Undergraduate Calendar.

### **Course Lecture Notes:**

Unless otherwise noted, all course materials supplied to students in this course have been prepared by the instructor and are intended for use in this course only. These materials are NOT to be re-circulated digitally, whether by email or by uploading or copying to websites, or to others not enrolled in this course. Violation of this policy may in some cases constitute a breach of academic integrity as defined in the UVic Calendar.

### **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

### **Course Assessment:**

Description of evaluation standards for evaluation elements.

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. To receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and



address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty."

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

**Late Work:** In the absence of a medical or family emergency there will normally be a grade penalty of **5%** for each day an assignment is late.

**Attendance and Participation:** Regular attendance is an expectation of the Gustavson School of Business. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

One missed class is fine, but more absences may result in downward adjustment of your grade. Students with unexcused absences from 3 or more on campus or online class sessions will have their final grade reduced by a minimum of 5%. The reasoning behind this apparently very stringent policy is that classes demand active participation and attendance.

\*unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the Brightspace course site.

**Missed Coursework or Assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.

**Preparation:** This course will be mostly on campus, however some classes will be held online. Please refer to the class schedule so you know what's happening and when. During class sessions, you should be prepared to lead off the discussion of any question in a significant way as well as to discuss salient issues which are not addressed per se in the assigned questions. As in any case discussion, it is crucial that you are well-prepared, listen carefully to others, and build on/critique previous comments. Clearly, you must participate in class if you are going to share your ideas with others. There is, however, no need to participate in every class. It is the quality of comments, not the quantity, that is germane. Occasionally, students find that it is easier to participate effectively from the point of view of a particular person or functional area, or to take on the role of devil's advocate or expert (if expertise is possessed) on the topic.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description

90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

### **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- Paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- Accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property. Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

### **Online Synchronous Session Access:**

UVic Zoom online classroom access will be posted in Brightspace. Please enable Brightspace Announcement notifications by email to receive these posts by email, or please check the Brightspace course site regularly to view Announcements posted by your instructor.

### **Course Schedule:**

Module Title	Type	Date	Class Description, Required Readings and Activities
ENT402:Week 1  Course Introduction Entrepreneurship Overview	Reading  Video  Complete exercise	Wednesday, Jan 11 6:30pm–9:20pm UVic Campus – Required Attendance	Introduction to entrepreneurship What is entrepreneurship? Where do entrepreneurial ideas come from? Course overview, learning outcomes and expectations  Class 01 pp. 1-20  10 myths of entrepreneurship  Complete: Entrepreneurship self-assessment exercise, pp. 21-44
ENT402:Week 2  Opportunity Recognition	Reading  Reading  Video Video	Wednesday, Jan 18 6:30pm–9:20pm UVic Campus – Required Attendance	Opportunity Recognition – Distinguishing a good business opportunity from a good idea  Class 02 pp. 45-69  What makes entrepreneurs, entrepreneurial? (Sarasvathy, 2010)  Marshalling resources Ideation Gallery assignment 1 overview Opportunity Evaluation and Quantification
ENT402:Week 3  Opportunity Evaluation and Quantification	Reading  Complete assignment	Wednesday, Jan 25 6:30pm–9:20pm UVic Campus – Required Attendance	Class 03 pp. 80-112  <b>Ideation Gallery – Idea 1 (10%) DUE</b>

Module Title	Type	Date	Class Description, Required Readings and Activities
ENT402:Week 4  Finding Customers	  Video  Complete assignment	Wednesday, Feb 1 6:30pm – 9:20pm UVic Campus – Required Attendance	Finding Customers   Developing customers  <b>Ideation Gallery –Idea 2(10%) DUE</b>
ENT402:Week 5  Creating Value	  Reading  Complete assignment  Prepare exercise  Complete assignment	Wednesday, Feb 8 6:30pm – 9:20pm UVic Campus – Required Attendance	Creating Value: Creating a value proposition Value proposition canvas explained  Class 04pp. 127-159  Customer development research assignment overview  Prepare: one value proposition canvas for one idea  <b>Ideation Gallery –Idea 3(10%) DUE</b>
ENT402:Week 6  Business Model Canvas MVP Design Lab Survey Pre- testing	  Video Video  Prepare for class	Wednesday, Feb 15 6:30pm–9:20pm UVic Campus – Required Attendance	Business Model Canvas, MVP Design and Survey Testing   MVP/prototype testing MVP Experiment Canvas  Prepare: one business model canvas for one idea Prepare: your MVP experiment canvas Prepare: your customer survey
ENT402:Week 7 Reading Week	No class	Wednesday, Feb 22 No Class	Continue work on the Customer Development Research assignment
ENT402:Week 8  Lean Start-up	  Reading  Video Video	Wednesday, Mar 1 6:30pm – 9:20pm UVic Campus – Required Attendance	Lean Start-up Movement   Class 05pp. 179 – 194  Lean start-up movement Overview of build-measure-learn cycle

Module Title	Type	Date	Class Description, Required Readings and Activities
ENT402:Week 9  Project Team Meetings Projects Chosen	    Complete assignment	Wednesday, Mar 8 6:30pm – 8:00pm UVic Campus – Required Attendance	Team Night  Team project and presentation assignment overview  Team meeting to select project business idea  <b>Customer Development Research (25%) DUE</b>
ENT402:Week 10  Financial Feasibility Funding and Financing	  Reading Reading	Wednesday, Mar 15 6:30pm–9:20pm UVic Campus – Required Attendance	Financial Feasibility   Class 06 pp. 201 – 230 Class 12 pp. 455 – 476
ENT402:Week 11  Field Testing MVPs	  Video Video Video	Wednesday, Mar 22 6:30pm–9:20pm Zoom Online Classroom	Testing and Validation  No assigned readings  Forms of Business Organization Elements of a formal business plan Key elements of successful plans
ENT402:Week 12  Small Business Law Writing a Formal Business Plan Social Entrepreneurship, Innovation Collaboration and New Business Locations  BMC Presentations	  Reading Reading Reading Reading  Video Video Video Video	Wednesday, Mar 29 6:30pm–9:20pm Zoom Online Classroom Team Presentation Schedule will be posted	Law, Business plans, social entrepreneurship, innovation and collaboration, and new business locations.  Class 09 – pp. 341 – 356 Class 11 – pp. 415 – 442 Class 15 – pp. 575 - 592 Appendices – pp. 599 – 679  Legal side of small business: IP Protection Social Entrepreneurship and Innovation Collaboration – New Business Spaces and Places  <b>Business Model Canvas Presentations(15%) DUE</b>
ENT402:Week 13  Course Wrap up		Wednesday, April 5 6:30pm – 9:20pm UVic Campus – Required Attendance	    <b>Final Written Assignment Report(30%) DUE</b>

Students with diverse learning styles and needs are welcome in this course. If you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

## IB 301 (A01)

### International Environment of Business Spring 2023 Course Outline

Note: please check your course and program sites frequently for updates and course changes.

Course hours:	Mondays and Wednesdays, 8:30-9:50 am
Location:	COR B143
Instructor:	M. Carmen Galang
Office hours:	By appointment (email to set up meeting)
Email:	cgalang@uvic.ca

***We acknowledge and respect thelək' wəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.***

#### **Texts and Resources:**

- THE GLOBAL BUSINESS ENVIRONMENT by Janet Morrison, 5<sup>th</sup> edition, 2020 (ebook available direct from publisher, or purchase hard copy from the UVic bookstore)
- A coursepack available for purchase at the UVic bookstore, containing the case “Society’s Voice Against Unilever Mercury Contamination in Kodaikanal”
- Other materials (such as other readings, additional cases, assignment instructions, powerpoints) will be posted on Brightspace as needed.

#### **Course Objectives and Description:**

This course focuses on the environment of business, namely the socio-cultural, political, legal, technological, ecological, and economic aspects that affect business decisions related to its strategy and operations, and ultimately performance. These aspects of the environment differ across countries, and pose opportunities and threats to both local and foreign businesses. Understanding how these aspects differ and how they affect business enables businesses to make more appropriate decisions that lead to better organizational performance that matters to its various stakeholders such as investors, employees, customers, the public in general, and governments. Key current developments and issues in the business environment will also be examined. The course also provides opportunities to experience working in a group of diverse members much like what the workplace is, and to exchange views with others on a variety of topics, and in the process, broaden one’s perspectives that is of value in successfully managing the international business environment.

#### **Course Format:**

The course will use a combination of lectures, cases, in-class discussions, readings, assignments, in-class exercises/activities and videos to enhance student learning, through asynchronous and synchronous delivery. *Asynchronous* components include required readings accompanied by quizzes,

videos and assignments, all accessible through Brightspace. These can be done at a time that is convenient to you; however, take note of the submission deadlines (see Requirements for Graded Work below). *Synchronous* components include meeting in-person twice a week, during which will be a combination of lectures, general class discussions, break-out group discussions and activities.

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

### **Educational Technology:**

I use a variety of educational technology in this course which may include internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

### **Course Experience Survey:**

The BCom Program and its instructors value your feedback. As with all of our courses, you will be expected to complete a confidential on-line course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the Program make improvements.

To complete the CES, you will need to use your UVic Netlink ID to access the survey, which can be done on your laptop, tablet or mobile device. As well, toward the end of the course, you will also receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey if you don't do so in the time provided in class.

## **Evaluation Elements:**

Students will be evaluated according to the following elements and schedule:

<b>EVALUATIONELEMENTS</b>	<b>Weight (%)</b>	<b>Due Dates/Times</b>
Quizzes (7)	15	See Schedule below
Assignments (6)	25	See Schedule below
Class Participation	15	
Team Project <ul style="list-style-type: none"><li>• Team charter (deduction of 5%from team project grade if no submission)</li><li>• Oral presentation (10%)</li><li>• Written report (20%)</li></ul>	30	<ul style="list-style-type: none"><li>• Team charter: 5pmFeb.13(Mon.)</li><li>• Oral presentations: Mar. 27, 29, Apr. 3, 5</li><li>• Written report: noon Apr. 5(Wed.)</li></ul>
Individual Final Paper	15	5 pm Apr. 12(Wed.)
<b>TOTAL</b>	<b>100 %</b>	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

## **Course Assessment:**

The following are descriptions of evaluation standards for evaluation elements.

### **Quizzes(15%)**

There are seven (7) quizzes. Unless indicated, all quizzes are based on the required reading(s) and videos. All quizzes are to be done on-line at a time convenient to you, but must be completed **no later than 1 pm** the day before the relevant class. In addition, completion of each quiz has a time limit of 15 minutes.

### **Class Preparation Assignments(25%)**

To help you better engage during class, there are six (6) assignments that need to be submitted. All assignments are individual work. Please note that collaboration on class assignments is only permitted with my permission and then only to the extent that I stipulate.

Specific instructions for each assignment will be posted on Brightspace as needed. Submit assignments through Brightspace **by 5 pm** the day before the relevant class.

Late Work: In the absence of a medical or family emergency, submissions after the deadline will have a 50% deduction from the awarded points; submissions after the class starts will not be accepted.

Assignments that show care, thought, insight and effort in completion will be awarded more than one point (up to a maximum of 5 points). This means both content and presentation (such as grammar, spelling). Keep your submissions short: no more than 3 pages (excluding any cover page, references, graphs, diagrams, tables), single line spacing, at least 10 points font size – deductions may be made for not adhering to these format requirements.

### **Class Participation (15%)**

Class participation is an effective means of understanding the concepts, principles and processes covered in the course. There are many opportunities to actively participate, such as (1) contribution



during general class and break-out group discussions; (2) oral report to the whole class of break-out group discussions, and (4) written submission of in-class activities.

Participation includes answering questions, raising points, sharing insights that contribute to a better understanding of the required readings or better awareness of the implications and issues involved; asking thought-provoking questions; sharing personal experiences to illustrate concepts and principles; sharing current news items from your reading of periodicals relevant to the topic being discussed. To actively participate requires coming to class prepared (having read all required reading assignments for the class, as well as exercise or case materials that need preparation, and having watched assigned videos). *Please note that you may be called upon during class to answer questions, share your thoughts and experiences, or report on your break-out group discussions.*

From time to time, there may be in-class exercises that will require submissions at the end of or during class. *Only submissions in class will be accepted as part of class participation, as they are a product of participating during the class.* Submissions in-class are normally done by e-mail; no submissions after the class has ended will be accepted.

### **Team Project: Assessing Country Attractiveness (30%)**

At the Gustavson School of Business, team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to BCom Program Director for initial meeting and further investigation as needed.

Please note Gustavson's standard of professional behavior when it comes to group activities ([Standards of Professional Behavior](#)):

- Credit work to all members of the group, especially when using the work for other purposes (e.g., when submitting a group report to a potential employer as a sample of your writing ability, you should cite the names of the other students who worked on the paper).
- It is unprofessional to let one or two members of the group do most of the work when the final grade or reward will be shared by the entire group as it circumvents the learning process. The group should attempt to resolve any misallocation of workload early in the process, and if difficulties persist, should seek advice from the professor or instructor as soon as possible.
- Collaboration on class assignments is only permitted with the instructor's permission and then only to the extent stipulated by the instructor. Be sure you understand the acceptable level of collaboration in each of your courses.
- We should each be a responsible and professional part of the group. This means delivering on work commitments, being prepared and on-time for meetings, and carrying an equitable workload share.
- We all deserve respect, consideration and common courtesy as members of the Gustavson School of Business. Deal with anger, tension and personality conflicts in constructive ways. Rude, insulting or disrespectful language or actions is neither professional nor appropriate.

- If group members reveal anything about themselves in confidence to other group members, and do not wish this information to be divulged outside the group, this should be respected. This would also apply to any confidential information about a third party or organization (e.g., a previous employer) that a member may divulge for group work purposes only.

More detailed information about the IB 301 team project is posted as a separate document on Brightspace in the Course Outline & Instructor section. The focus of the team project is assessing the attractiveness of the general business environment of a country that your team has chosen. Country selection is on a first-come, first-served basis; a sign-up sheet will be posted on my office door by noon on Feb. 13 (Mon.).

The team project is an opportunity to apply class concepts and to learn more about a country. As important, the team project is an opportunity to experience working in a group of diverse members much like what the workplace is, but also to develop skills in doing research (such as finding relevant and valid information or data; analyzing/interpreting the information or data according to the purpose or objective of the project), writing a report, and doing an oral presentation.

You will be assigned to groups of 4-5 members, ensuring as much diversity as possible among group members. Groupings will be announced during the **Feb. 6** class, so please be present at this class as groups will begin working then. Being present when the group first meets is an important ingredient to better group results. The purpose of group work is to enhance your skill in working collaboratively. When a group-based assignment forms part of your evaluation for a grade, all members of the group will receive the same grade. However, adjustments may be made for relative contribution through peer evaluation. Each team member must rate the participation of their teammates. Rate each teammate on the following statement: "This team member did their fair share of work in a timely and high quality manner." Use the following rating scale: 1= *Strongly Disagree*; 2= *Disagree*; 3= *Neither Disagree nor Agree*; 4= *Agree*; 5= *Strongly Agree*. Please **submit through Brightspace by noon on Apr. 5 (Wednesday)** your assigned rating for *each* team member. Submission of this peer evaluation will be counted towards your participation mark.

There are three components to the team project: team charter, oral presentation and written report. Only the written report and oral presentation are graded. However, if your team does not submit your team charter by **5 pm on Feb. 13 (Monday)**, 5% will be deducted from the team project grade. Oral presentations will be recorded; the recordings will be seen only by me (or any designated marker for the course) for the purpose of helping to grade the oral presentation.

Oral presentations are scheduled over 4 classes: **Mar. 27, 29, Apr. 3 and 5**. Which date your team makes the oral presentation will be determined by me, on the basis primarily of ensuring a wider range of regions covered for each day. The oral presentation is worth 10%. Not all team members need to participate in the oral presentation; who and how many are to be decided by your team. However, participation in the oral presentation will be considered in your participation mark. The length of the oral presentation will be announced later, as it will depend on the actual number of teams; usually oral presentations are between 10-15 minutes with about 5 minutes for Q&A and transitions between groups. I will cut you off if you exceed the time allocated in order to give the same amount of time for all groups.

The team's written report is worth 20% and is due by **noon on Apr. 5 (Wednesday)** after the oral presentations. This allows your team to make adjustments to the written report if you wish.

**Late Work:** In the absence of a medical or family emergency, submission of the team's written report after the deadline will be given a 4% deduction from the assigned percentage grade; submissions 24 hours after the deadline will no longer be accepted, and your team will receive a grade of 0 for the written report. Appropriate documentation of the medical or family emergency must be submitted.

### **Individual Final Paper (15%)**

The individual final paper is based on the country report your team submitted, and is **due by 5 pm on Apr. 12 (Wednesday)**. This paper involves determining whether the country your team worked on is

suitable for a specific firm to enter; you will be given a list of firms to choose from. The details of the 5-10 page Individual Final Paper requirement will be released noon on Apr. 5 (Wed.) via Brightspace.

**Late Work:** In the absence of a medical or family emergency, submissions after the deadline will be given a 4% deduction from the assigned percentage grade; submissions 24 hours after the deadline will no longer be accepted, and your grade for the final paper will 0. Appropriate documentation of the medical or family emergency must be submitted.

### **Attendance**

Regular attendance is an expectation for Gustavson classes. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Let me know as soon as you can if you will be absent or have been absent due to illness, injury or family affliction; documentation may be required (within 24 hours after return to classes). These absences will be considered excused and will not count against your participation grade. For other reasons, it is also *highly appreciated* to inform me beforehand, if you will not be attending a class, will be late for class or will have to leave early.

**Missed Coursework or Assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations.

### **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	<b><u>Exceptional, outstanding and excellent performance.</u></b> Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	<b><u>Very good, good and solid performance.</u></b> Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	<b><u>Satisfactory, or minimally satisfactory.</u></b> These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	<b><u>Marginal Performance.</u></b> A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	<b><u>Unsatisfactory performance.</u></b> Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

*Please note:* Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Final course grades are official only after they have been approved by the BCom Program Director and may be subject to change up until that point.

### **Academic Integrity:**

As our programs help to create business and government leaders, the Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- Accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

**Schedule:** Please note that schedules are subject to change – any changes will be announced in class and through Brightspace.

DATE	TOPIC	REQUIRED All chapters refer to the textbook
Jan. 9 Mon	Introduction	<b>Read</b> <ul style="list-style-type: none"><li>• Course Outline</li><li>• Team Project Description</li></ul>
Jan. 11	Understanding Globalization	<b>Read</b> Chapter 1: The Business Enterprise in Focus

DATE	TOPIC	REQUIRED All chapters refer to the textbook
Wed		<b>Watch videos:</b> <ul style="list-style-type: none"> <li>The World Ahead 2023: five stories to watch out for (The Economist, 2022, 20 min.) <a href="https://www.youtube.com/watch?v=nv3iOH_XYdo">https://www.youtube.com/watch?v=nv3iOH_XYdo</a></li> <li>The Global Food Crisis, Explained (The Economist, 2022, 12 min.) <a href="https://www.youtube.com/watch?v=oQWaw5S4b3I">https://www.youtube.com/watch?v=oQWaw5S4b3I</a></li> </ul>
Jan. 16 Mon	The Pandemic and the Global Business Environment	<b>Read</b> Bonus Chapter: Worldwide Pandemic and the Global Business Environment ( <i>posted on Brightspace</i> )  <b>Watch videos:</b> <ul style="list-style-type: none"> <li>How humans are making pandemics more likely (Vox, 2020, 7 min.) <a href="https://www.youtube.com/watch?v=gq5CEclyk94">https://www.youtube.com/watch?v=gq5CEclyk94</a></li> <li>Will COVID kill globalization? (The Economist, 2020, 14 min.) <a href="https://www.youtube.com/watch?v=KJhlo6DtJlk">https://www.youtube.com/watch?v=KJhlo6DtJlk</a></li> </ul> <b>Prepare for discussion:</b> Read the mini-case study - How the pandemic played havoc with meat supply chains in the US (pp. 21-22 of bonus chapter). See <i>Brightspace</i> for the discussion questions.
Jan. 18 Wed	Global Business Environment	<b>Read</b> Chapter 2: Globalization and the Business Environment  <b>Submit quiz 1</b> (due 1 pm, Jan. 17)  <b>Assignment 1</b> (due 5 pm, Jan. 17): Farmacias Similares case ( <i>posted on Brightspace</i> )
Jan. 23 Mon	Corporate Social Responsibility	<b>Read</b> Chapter 11: Ethics and Social Responsibility  <b>Submit quiz 2</b> (due 1 pm, Jan. 22)  <b>Watch videos:</b> <ul style="list-style-type: none"> <li>Grameen Danone Food Project (2012, 12 min.) <a href="https://www.youtube.com/watch?v=ZDkTDcl53hg">https://www.youtube.com/watch?v=ZDkTDcl53hg</a></li> <li>Grameen Danone – The business of social innovation (2014, 20 min.) <a href="https://www.youtube.com/watch?v=SDh2otLO1-k">https://www.youtube.com/watch?v=SDh2otLO1-k</a></li> </ul> <b>Assignment 2</b> (due 5 pm, Jan. 22): Grameen Danone case ( <i>posted on Brightspace</i> )
Jan. 25 Wed	Assessing Country Attractiveness	<b>Read</b> The Process of Assessing Country Attractiveness (excerpt from Chapter 6, The International Business Environment by Hamilton & Webster, 2018) ( <i>posted on Brightspace</i> )

DATE	TOPIC	REQUIRED All chapters refer to the textbook
		<b>Watch videos:</b> <ul style="list-style-type: none"> <li>Why Finland and Denmark are happier than the U.S. (CNBC, 2020, 25 min.) <a href="https://www.youtube.com/watch?v=6Pm0Mn0jYU">https://www.youtube.com/watch?v=6Pm0Mn0jYU</a></li> <li>What the Social Progress Index can reveal about your country (2014, 15 min.) <a href="https://www.ted.com/talks/michael_green_what_the_social_progress_index_can_reveal_about_your_country?language=en">https://www.ted.com/talks/michael_green_what_the_social_progress_index_can_reveal_about_your_country?language=en</a></li> </ul>
<b>Jan. 27 Fri</b>	<b>Submit yourself-introduction on Brightspac <u>by 5pm</u>.</b>	
Jan. 30 Mon  Feb. 1 Wed	Sociocultural Environment	<b>Read</b> Chapter 3: Culture and Societies  <b>Watch video:</b> The surprising workforce crisis of 2030 – and how to start solving it now (TED Talks, 2014, 13 min.) <a href="https://www.ted.com/talks/rainer_strack_the_workforce_crisis_of_2030_and_how_to_start_solving_it_now?language=en">https://www.ted.com/talks/rainer_strack_the_workforce_crisis_of_2030_and_how_to_start_solving_it_now?language=en</a>  <b>Submit quiz 3</b> (due 1 pm, Jan. 29)  <b>Assignment 3</b> (due 5pm, Jan. 29): PIGAMU case (posted on Brightspace)
Feb. 6 Mon  Feb. 8 Wed	Group Effectiveness	<b>Read</b> Forming The Team (Chapter 6, Creating Teams with An Edge, Harvard Business Essentials, 2004) <a href="http://ezproxy.library.uvic.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&amp;db=e076mww&amp;AN=674829&amp;site=ehost-live&amp;scope=site&amp;bv=EK&amp;ppid=Page_-23">http://ezproxy.library.uvic.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&amp;db=e076mww&amp;AN=674829&amp;site=ehost-live&amp;scope=site&amp;bv=EK&amp;ppid=Page_-23</a>  You will meet your assigned team for the team project group during class – Please make sure to attend!
<b>Feb.13 Mon</b>	<ul style="list-style-type: none"> <li><b>Submit team charter <u>by 5pm</u>.</b></li> <li><b>Post your team's selected country, first come-first served; sign-up sheet on my office door will be available <u>starting noon</u>.</b></li> </ul>	
Feb. 13 Mon  Feb. 15 Wed	Political Environment	<b>Read</b> Chapter 5: The Political Environment: Politics and Business Intertwined  <b>Watch videos:</b> <ul style="list-style-type: none"> <li>How bad is the crisis in democracy? (The Economist, 2020, 28 min.) <a href="https://www.youtube.com/watch?v=PWt7naYTiik">https://www.youtube.com/watch?v=PWt7naYTiik</a></li> <li>War in Ukraine: how has the world changed? (The Economist, 2022, 8 min.) <a href="https://www.youtube.com/watch?v=XXcXVt3zaVwh">https://www.youtube.com/watch?v=XXcXVt3zaVwh</a>  <a href="https://www.youtube.com/watch?v=XXcXVt3zaVw">https://www.youtube.com/watch?v=XXcXVt3zaVw</a></li> </ul> <b>Submit quiz 4</b> (due 1 pm, Feb. 12)  <b>Assignment 4</b> (due 5 pm, Feb. 12): Society's Voice Against Unilever Mercury Contamination in Kodaikanal (case in coursepack)

DATE	TOPIC	REQUIRED All chapters refer to the textbook
<b>Feb. 20-24</b>	<b>Reading break(Feb. 20 –Family Dayholiday)</b>	
Feb. 27 Mon  Mar. 1 Wed	Legal Environment	<p><b>Read</b> Chapter 6: The Legal Environment</p> <p><b>Submit quiz 5</b> (due 1 pm, Feb. 26)</p> <p><b>Prepare for discussion:</b> See <i>Brightspace</i> for the discussion questions.</p>
Mar. 6 Mon  Mar. 8 Wed	Technological Environment	<p><b>Read</b> Chapter 9: Technology and Innovation</p> <p><b>Submit quiz 6</b> (due 1 pm, Mar. 5)</p> <p><b>Watch videos:</b></p> <ul style="list-style-type: none"> <li>What will future jobs look like? (TED Talks, 2013, 15 min.) <a href="https://www.youtube.com/watch?v=cXQrbxD9_Ng">https://www.youtube.com/watch?v=cXQrbxD9_Ng</a></li> <li>Robots will steal your job, but that's ok (TEDx Talks, 2012, 18 min.) <a href="https://www.youtube.com/watch?v=kYlfeZcXA9U">https://www.youtube.com/watch?v=kYlfeZcXA9U</a></li> <li>The future of work: is your job safe (The Economist, 2019, 19 min.) <a href="https://www.youtube.com/watch?v=gUc5oN_ffRo">https://www.youtube.com/watch?v=gUc5oN_ffRo</a></li> </ul> <p><b>Highly recommended video:</b> The rise of AI (Bloomberg, 2018, 52 min.) <a href="https://www.youtube.com/watch?v=Dk7h22mRYHQ">https://www.youtube.com/watch?v=Dk7h22mRYHQ</a></p> <p><b>Assignment 5</b> (due 5 pm, Mar. 5): Automation: opportunities and threats (textbook, pp. 313-314). See <i>Brightspace</i> for discussion questions.</p>
Mar.13 Mon  Mar.15 Wed	Ecological Environment	<p><b>Read</b></p> <ul style="list-style-type: none"> <li>Chapter 10: Ecology and Climate Change</li> <li>Chapter 12: Sustainable Business: the Prospects</li> </ul> <p><b>Submit quiz 7</b> (due 1 pm, Mar. 12)</p> <p><b>Watch videos</b>, in this order:</p> <ul style="list-style-type: none"> <li>Let the environment guide our development (TED Talks, 2010, 19 min.) <a href="https://www.youtube.com/watch?v=RgqtrlixYR4">https://www.youtube.com/watch?v=RgqtrlixYR4</a></li> <li>Doughnut economics (RSA, 2013, 18 min.) <a href="https://www.youtube.com/watch?v=CqJL-cM8gb4">https://www.youtube.com/watch?v=CqJL-cM8gb4</a></li> <li>The economics of kindness (Creatively United for the Planet, 2020, the first 34 min.) <a href="https://www.youtube.com/watch?v=eqRif4e6ORs">https://www.youtube.com/watch?v=eqRif4e6ORs</a></li> </ul> <p><b>Assignment 6</b> (due 5 pm, Mar. 12): How did we get here and what is the way forward? See <i>Brightspace</i> for questions to answer.</p>
Mar. 20 Mon	Sustainable Development	<p><b>Prepare for discussion:</b> Revisit the Grameen Danone case. See <i>Brightspace</i> for discussion questions</p>
<b>Mar.22 Wed</b>	<b>NO CLASS: Free day to prepare for group presentations starting next week</b>	

DATE	TOPIC	REQUIRED All chapters refer to the textbook
Mar. 27, 29, Apr. 3, 5	<ul style="list-style-type: none"> <li>Group oral presentations: date/order to be assigned</li> <li>Course Experience Survey (CES)</li> </ul>	
Apr. 5 Wed	<b>Submit <u>by noon</u>:</b> <ul style="list-style-type: none"> <li>written report for the team project</li> <li>your peer evaluation</li> </ul>	
Apr. 5 Wed	Release of the detailed requirements for the Individual Final Paper <u>by noon</u> .	
Apr. 12 Wed	Submit Individual Final Paper <u>by 5pm</u> .	





## **SMGT 415, 416, 417**

### **Service Management Specialization**

#### **Spring 2023 Course Outline**

Note: Please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	Monday 1:00pm to 3:50pm, CLE C112, Christian (Customer Experience Management) Tuesday 1:00pm to 3:50pm, DSB C112, Rick (Talent Management/HR) Thursday 1:00pm to 3:50pm, CLE C112, Jie (Service Operations)
Instructors	Christian Van Buskirk, Rick Cotton, Jie Zhang
Office hours	As requested; please contact your professor as needed with two or three days/times that will work for you.
Email	<a href="mailto:cvanbus@uvic.ca">cvanbus@uvic.ca</a> ; <a href="mailto:rcotton@uvic.ca">rcotton@uvic.ca</a> ; <a href="mailto:jiezhang@uvic.ca">jiezhang@uvic.ca</a>

***We acknowledge with respect the Lekwungen-speaking peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.***

***UVic is committed to promoting, providing and protecting  
A supportive and safe learning and working environment for all its members.***


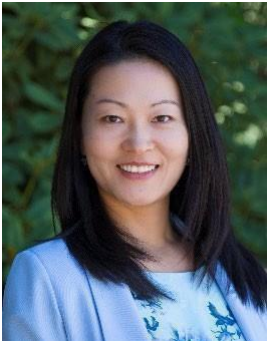
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### **The Service Management Experience**

Over the course of the term, Service Management Specialization students will achieve the following objectives:

1. Understand the importance of service excellence in *all* businesses.
2. Understand services from a systems perspective (operations, talent management/human resources, marketing and technology).
3. Use frameworks and other tools to diagnose service problems and make recommendations for improvements to the business.
4. Develop the capability to transform an organization using service excellence.

## Service Management Spring Team Introductions:

 <p>Rick</p> <p><a href="mailto:rcotton@uvic.ca">rcotton@uvic.ca</a></p> <p>office: 250-721-8052</p> <p>cell: 250-661-6957</p>	<p>Welcome to the Service Management Specialization! I'm Rick Cotton and I am an Associate Professor of Talent Management and Sustainable Innovation. I very much enjoy teaching UVic Service Management students at Gustavson and I expect this class with a variety of live and asynchronous learning opportunities to be no different. I've been teaching at UVic since 2015 and am married with two kids and a dog named Clark. I also love volleyball and when able to fit it in, I play in the Top Spin league here in Victoria for "The Empire Spikes Back". I also kayak which has been a great, socially distanced escape especially during these COVID years.</p> <p>I have a B.S. in Management Information Systems and Marketing (dual) from Syracuse University and a MS and PhD in Organization Studies from Boston College. My expertise in maximizing human, social and positive psychological capital spans many years and I've had the chance to put it use with several different organizations. I teach, consult and speak to service organizations on subjects focused on maximizing employee and organizational performance and potential. These topics primarily include success networks (a.k.a. developmental networks, personal boards of advisors), career success, talent management best practices, strategic human resource management, leadership, resilience and cross-cultural topics. I also research talent management in professional baseball as no other field has such fine-grained performance data and I'm also a core researcher on two large international collaborations: one on contemporary careers research (<a href="https://5c.careers/">https://5c.careers/</a>) and one on country culture and leadership (<a href="https://www.globeproject.com/">https://www.globeproject.com/</a>).</p> <p>I've worked for companies focused on service excellence including for Citibank London in financial futures before working as a change management consultant providing organizational transformation and people strategy guidance for Accenture clients in many different industries. I then was a SVP of HR for a Fortune 500 services company before getting my PhD. As a consultant, researcher and speaker, my clients have included Aetna, BC Corrections, BC Ferries, General Electric, Harbour Air, the Inter-Cultural Association of Victoria, Pepsi, Tourism Victoria, United Technologies and others. My research has appeared in top HR and management academic journals as well as Harvard Business Review, Sloan/MIT Management Review, Inc., BC Business, and I've had the honour of doing interviews with CFX 1070 for more than a year now on ongoing labour market issues and opportunities – an especially hot topic with so many firms struggling with retention.</p>
 <p>Jie</p>	<p>Welcome SMGT OPS! My name is Jie Zhang and I am an Associate Professor of Service Management. I have been teaching at the Gustavson School of Business since 2016 and enjoyed delivering the service management module to BCOM and MBA students. Prior to moving to Canada, I was on the faculty at the University of Vermont. I had worked as an IT professional for nearly a decade before my academic career.</p> <p>I have a Doctorate in Operations and Technology Management from Boston University, an ScM in Computer Science and an MA in Sociology from Brown University, and a BA in Economics from Fudan University. My diverse background has converged on constructing high performing service operations for sustainable, healthy, and fulfilling futures. My research projects draw on theories and practices in service research, technology and knowledge management, and</p>

	sustainable
<a href="mailto:jiezhang@uvic.ca">jiezhang@uvic.ca</a> office: 250-472-5736	<p>development. My publications have appeared in premier operations management journals including <i>Journal of Operations Management</i> and <i>Production and Operations Management</i>.</p> <p>In my spare time, I volunteer on the governance board at the Seniors Serving Seniors, a non-profit organization dedicated to improving the well-being of senior citizens in Greater Victoria since 1981. I also enjoy listening to music/podcasts/books, spending time with my cat “Casper”, and exploring the many trails in the Southern Vancouver Island.</p>
 <p>Christian  <a href="mailto:cvanbus@uvic.ca">cvanbus@uvic.ca</a>  office: 250-472-4845</p>	<p>Welcome to Customer Experience Management! My name is Christian Van Buskirk and I bring over 25 years industry experience in the private and public sectors to my position as Assistant Teaching Professor at Gustavson, ranging from marketing and coordinating province-wide tourism initiatives to owning and operating a destination marketing organization (DMO) and customer experience management consulting business. I have worked with both for-profit and not-for-profit organizations to create and execute marketing and management initiatives in areas including experience management, observational research, branding and marketing communications.</p> <p>I joined Gustavson in 2014 and teaches in all levels of the business school, from first to fourth year as well as in our MBA Program. I teach several courses in the area of marketing and management. I was the recipient of the Gustavson School of Business Excellence in Teaching Award in 2020.</p> <p>Most recently, I have been involved in community-based tourism skills and tourism entrepreneurship skills training as well as sustainable tourism education. I act as the North American representative on a three-year project, funded by the LEGO Foundation as part of the United Nations-supported initiative, Principles for Responsible Management Education (PRME). As part of this pedagogy expert team, I collaborate with a global education community to develop a “Playbook” of teaching materials and instructional strategies that will give educators effective ways to teach sustainable, responsible management to business students.</p>

### **Texts and Resources:**

In the past we have used textbooks, but over time recognized the value in creating a set of readings that provide frameworks for understanding service systems. Professors

will provide information on Brightspace on how to access required readings whether through course reserves, online course packs, links to the UVic library, or other sources.

### **Course Format:**

We deliver the service management specialization in three main phases. First we discuss service strategy and define what the business aims to achieve – why it exists and what differentiates it. Second, we focus on service design and how a business can organize to achieve maximum service potential. Finally, we cover delivery. In this (the longest phase of the course) we emphasize the day-to-day activities that create positive service experiences for customers.

The integration of the course means that we sometimes teach together and sometimes on our own. Typically, but not always, you will have Christian on Mondays, Rick on Tuesdays.

and Jie on Thursdays. This means it is very important to pay attention to the course schedule and Brightspace to understand what is coming next.

The Service Management Specialization will have both asynchronous and live/synchronous learning components to maximize learning. For asynchronous learning, we will utilize articles, book chapters, links, practice exercises, and videos along with enhanced PowerPoints (with narration or detailed notes, etc.) when appropriate and Brightspace functionality including assignments and/or forums. For synchronous learning, we will utilize Zoom and live classes over the semester, we will leverage its polling, breakout rooms, whiteboard and chat functionality. We expect you to leverage these learning opportunities as we all create the learning environment together.

In general, for each class, your participation will typically follow this pattern:

- Check Brightspace and do all assigned readings and any asynchronous content such as reviewing enhanced PowerPoint slides (as appropriate) for that class, watching videos, completing pre-class exercises, or participating in forums etc. for that class.
- Engage and participate in the live/synchronous class where you can expect, in line with that class's content, a combination of discussion of the assigned readings coupled with exercises, breakout groups, and discussion of any questions you may have about the class content.
- After class, reflect on class content and complete any asynchronous content such as post-class exercises or participating in forums etc. related to what was learned during the synchronous class.

### **Equity, Diversity and Inclusion:**

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared

responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

### **Educational Technology**

We use a variety of educational technology in this specialization including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: Zoom. We will make you aware if this list changes. We use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada. We encourage you to read these documents (available at <https://zoom.us/privacy>).

If you are not comfortable with your personal information being stored outside of Canada, please speak to us within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

### **Evaluation Elements:**

The Service Management Specialization is comprised of the following courses: SMGT 415, 416, and 417. Students will receive one overall grade for the specialization (i.e. students will receive the same grade across all three courses). Students will be evaluated based on the following course elements:

<b>Title</b>	<b>Individual or Group</b>	<b>Due Date</b>	<b>Weight/ %of Grade</b>
Participation	Individual	Ongoing; synchronous and asynchronous	15%of grade
TM/HR: Service TM/HR Case Facilitation & Paper	Group	varies; one case per team; delivery team's facilitation PPT & Case Report should be emailed to Rick no less than 30mins prior to class on day of your team's facilitation	10%of grade
TM/HR: Service Talent Management Exam	Individual	<b>Tuesday, Mar28</b> ; in-person during class	10%of grade

CEM: Service Anthropologist Assignment	Group	<b>Sunday, February 5</b> ; submit in Brightspace by 6:00pm	10%of grade
CEM: Integrating Service Systems Assignment	Individual	<b>Sunday, March 5</b> ; submit in Brightspace by 11:59pm	10%of grade
OPS: Process Improvement Assignment	Group	<b>Sunday, February 19</b> ; submit in Brightspace by 11:59pm	10%of grade
OPS: Data Analytics Assignment	Individual	<b>Sunday, Apr 9</b> ; submit in Brightspace by 11:59pm	10%of grade
Consulting Project Report Presentation Total	Group	<b>Tuesday, Apr 4</b> ; submit in Brightspace by <u>8am</u>	12.5% 12.5% 25%of grade
Total			100%

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

**Participation:** We adopt the student as co-producer model as central to the successful delivery of the service management specialization. The only way to effectively learn the material is through a high level of engagement and participation in all course components. To support this we allocate 15% of the total grade to participation (i.e. 5% for each of the three courses).

Since we create the learning environment together, regular attendance, participation and engagement in class maximizes learning. Your participation will be evaluated on both live/synchronous and asynchronous components. Please be mindful that there are approximately 11 sessions per instructor. **Missing two or more live/synchronous sessions with unexcused absences for a particular instructor may lead to receiving zero for your live/synchronous participation grade for that course.** The general expectation is that all live/synchronous classes will be attended except in the case of documented illness, accident or "family affliction."

Attendance, however, is not the only component of your participation grade. Therefore, you are unlikely to receive high marks for this portion of your grade just for attending all classes. Participation involves the following:

- Preparation effort for class including the completion of readings and assignments
- Attendance, engagement and active involvement in live/synchronous and asynchronous class activities, discussions, exercises, forum etc. in a manner that adds value
- Asking questions that are topic relevant and insightful
- Making meaningful comments that add to the learning experience
- Responding to questions of the instructor or other students
- Participating and completing in-class assignments, discussions, cases, exercises, etc.
- Playing a leadership role in the class

Please note that being late, frequently entering and leaving the Zoom classroom, or leaving live/synchronous sessions early not only detracts from the learning environment and will result in poor participation marks but also may be considered as an unexcused absence for that session. You are expected to actively participate in class and not detract

from the learning experience of your fellow students to receive high marks for participation. After all, we create the learning environment together and student participation and engagement is critical to conducive learning for all involved.

**Group and Individual Assignments:** There will be 5 assignments, one consulting project and one exam. Most work in service organisations requires an integrated approach often accomplished through team-based assignments. We try to balance the need to successfully work in teams with the capability to solve problems individually or in pairs/trios. We have designed several graded reports and presentations to be completed in groups and also have individual/pair/trio-based evaluation elements.

Late assignments will be reduced 10% for each day late from the submission date and time. As in real life, meeting deadlines is important to success. Please get your assignments in on time and that includes timely engagement in discussion forums!

### **Service Talent Management/HR Case Facilitation and Paper (Rick)**

Case studies are a great way to learn by applying tools and frameworks from class to real situations. As such, each team will be responsible for writing up one case study analysis in response to posted questions and facilitating the associated case discussion live or on-line over Zoom. Facilitating is more than just presenting – it entails sharing your perspective, actively listening and building a rich discussion of case content by getting the audience involved through discussion, activities, etc – all in an effort to maximize learning. The paper itself is a maximum of 7 single-spaced pages (plus any additional exhibits) which fosters the creation of a cogent and efficient write-up – a critical skill in getting your points across in a powerful and efficient manner. In terms of logistics, this paper and your team's PowerPoint slides for your facilitation should be emailed to Rick no less than 30 minutes before the start time of the class your individual team is facilitating.

For your case analysis, you should apply what you've learned in class along with the readings that are pertinent to the case - especially the readings just prior to the class you are facilitating. In your paper you should answer each component of each question and remember: The focus needs to be on your insights in answering the case questions posed NOT on what actually happened to the organization subsequent to the case. The cases provide us with context but the questions are more focused on course-specific tool and framework application.

As part of your facilitation, you should start by providing some brief case background information. The case background should be brief because the most important outcome is that you facilitate a rich discussion with the class around the case questions and other interesting topics from the case that your team finds important to discuss. In short, the questions posed to you for your team's case are the minimum of what should be discussed with the class. (Just as in real life, making your own unique, insightful contributions in real time discussion are critical to adding value and thinking of creative ways to get the class involved over Zoom will enliven and enrich the conversation). Case teams should be prepared to facilitate for 45 minutes in total followed by a Q&A/debrief. Participation by other class members in case discussions/activities is also very important as these discussions represent an excellent opportunity to showcase your preparation and analysis – even though you are not formally 'on stage' as the facilitating team is. So please be prepared and engaged in these real-life situations as they will help you in your career when you face similar types of scenarios down the road. **Your facilitation will occur at the beginning of class on the date your team is assigned and the case paper and your team's PowerPoint should be emailed to Rick no less than 30 minutes before the beginning of that same class.**



### **Service Talent Management Exam (Rick)**

The Talent Management exam will be held in-person on **Tuesday, March 28th** during the scheduled class time frame (**1:00 – 3:50pm**). The exam is intended to offer students an opportunity to ‘strut your stuff’ in terms of showing off your ability to apply and integrate the material covered in only the Talent Management/HR section of the specialization since the beginning of the term. The exam is cumulative and will focus on application of material including core concepts and tools as well as readings, cases, and any guest speaker comments. The exam will use a combination of applied essay and fill-in-the blank questions.

No make-up exams will be offered except in the case of a valid medical reason. Students who miss the exam without a valid excuse (such as documented cases of illness, accident or “family affliction”) will not have an opportunity to make up this grade component. Please make every effort to take the exam at the prescribed date and time. In addition, the exam is closed readings/closed notes, no computer/phone/electronic access and work on your exam is to be solely your own. All students, as with the other assignments, are expected to pursue the highest standards of academic integrity.

### **Service Anthropologist Assignment (Christian)**

More and more service managers are realizing the benefits of anthropology in their work to understand the customer. Ethnographic narratives allow the investigator to describe and analyze the practices and beliefs of cultures and communities. The focus is to understand the culture or community from a participant observer perspective that takes into account the insider’s and the outsider’s perspective. This assignment will have you work as an anthropologist to view a service firm.

The objective is to develop your observation skills and your ability to see details that make up the design and delivery of a service experience, as well as to practice your analytical skills and the ability to craft a report.

After you have formed a group, choose 3 service firms that have a common element. They may all be restaurants, retail stores, banks, fitness facilities, health care settings etc. Visit each firm individually or in pairs. Note that different members of your group can observe the same service provider to see how your impressions match up; but still make sure that 3 firms are viewed. Spend time (approx. one hour) in the business just watching other customers and the service providers.

Your group should visit the business at different times and on different days so you can make comparisons about the traffic levels and customer demographics. The text of the paper should be around 7 pages, with additional pages for tables, figures and other graphics, references and the field notes in the appendix.

Specifics as to what observations should be made and questions you should answer will be listed in a more detailed document on Brightspace. **The assignment is due on Sunday, February 5 by 6:00pm.**

### **Integrating Service Systems Assignment (Christian)**

This assignment to be done individually and examines the challenges firms face when they attempt to grow their businesses by integrating new services into an existing service system. Introducing additional services can be very attractive yet also especially difficult if the new service requires a substantially different design than the original service. The project is based in large part on a framework that Steve Tax developed with a colleague from research they conducted in the area of service design and growth.

Read the article, “*Designing and Implementing New Services: The Challenges of Integrating Service Systems*” (to be posted on Brightspace). This article examines the



issues involved in introducing a new service into an existing offering. It provides a process for identifying the extent of differences (people, process, physical environment) for each of the services and the risk of trying to integrate them.

Based on the above article, students will select an existing service provider (provide an introduction and background of the current service model). If you wish, you can use an organization where you have worked or are currently working. Provide a brief overview of the existing service. Identify and briefly describe a new service you would like to introduce into that service system (describe the new service offering). If you are not intimately familiar with the service, you will need to interview someone who has the requisite knowledge.

Using the concepts from Tables 1, 2 & 3 in the article, identify and discuss the differences (extent of change) and (cross impact issues) resulting from integrating the two systems. Provide managerial recommendations regarding the viability and key success factors associated with introducing the new service.

The assignment should be approximately 2500 – 3500 words and several tables and figures. A more detailed description of the assignment will be posted on Brightspace. The assignment is due on **Sunday, March 5 by 11:59pm.**

#### **OPS: Process Improvement Assignment (Jie)**

You have acquired a deep understanding of a service encounter as well as extensive details that make up the design and delivery of the service experience in your Service Anthropologist Assignment earlier in the term. This process improvement assignment will have you rigorously analyze and design a service process by leveraging your group's in- depth ethnographic field research.

You will work in the same group as your Service Anthropologist Assignment. Review your ethnographic experience and notes. Choose one service encounter, and see it from the perspective of the customers' perspective. Draw a service blueprint for a clearly defined service experience identified from your anthropologist field observations. In a written summary, analyze the strengths and weaknesses of the current operations, and explain recommendations to improve the customer experiences.

Specifics regarding the deliverables will be listed in a more detailed document on Brightspace. **The assignment is due on Sunday, February 19 by 11:59pm.**

#### **OPS: Data Analytics Assignment (Jie)**

You will be exposed to several common analytical tools used in service operations management during the second half of the course. In this individual assignment, you will be provided with brief business scenarios and data. You will apply the tools and show how you will utilize the data to make the necessary decisions.

Specifics regarding the deliverables will be listed in a more detailed document on Brightspace. **The assignment is due on Sunday, April 9 by 11:59pm.**

#### **Consulting Project**

This team project will provide you with an opportunity to demonstrate your grasp of service management concepts in a real-world situation. Your team will select a service organization to study. As with the Talent Management Plan, choose an organization that at least one person on your team knows well and one for which you can access information readily. You will be expected to apply and integrate theories, concepts, and tools (etc.) from all three courses covered throughout the service management specialization program to analyze the service and develop actionable recommendations. A more detailed description of the assignment will be posted on Brightspace. The presentation and report will be due on **Tuesday, April 4<sup>th</sup> by 8am.**

## **Course Assessment:**

**Group Work:** At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty."

### **What to do if there is a problem in your group:**

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

**Peer Evaluation:** Please note that teammate evaluations (which include a self-evaluation) will be an additional qualitative factor that will be considered in your participation grade; such feedback may be used to adjust course grades positively or negatively. The peer evaluation form will be posted to Brightspace.

**Late Work:** In the absence of a medical or family emergency there will normally be a grade penalty of 10% for each day an assignment is late.

**Attendance and Participation:** Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Students with unexcused absences\* from more than 2 class sessions per instructor will be penalized as follows: ***Missing more than two live/synchronous sessions with unexcused absences for a particular instructor may lead to receiving a zero for your synchronous participation grade for that course.***

To document an excused absence (illness, injury or family affliction), please submit your documentation to the instructor whose class you missed. Appropriate documentation must be submitted immediately upon your return to classes (within 24 hours).

\*unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site.

**Missed Coursework or Assessments:** Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.

Please refer to the University of Victoria Calendar for more details pertaining to the University's attendance policy.

## **Grading Scale:**

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade (used to determine your course letter grade) will be rounded to the nearest whole percentage (e.g. a course percentage grade of a 79.49% would be reported as a 79% and result in a letter grade of a B+). The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0 – 49	E		Conditional supplemental
0 – 49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

## **Course Experience Survey:**

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

## **Academic Integrity:**

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.

- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (cribnotes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

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**Schedule Summary:****Spring2023 – Service Management Specialization**

Wk	Weekday	Date	Topic	Professor
1	Monday	09-Jan-23	Welcome to the Service Management Specialization!  Note: Use Kabob Oasis; Gather Team Preferences	ALL (CLE C112)
	Tuesday	10-Jan-23	TM/HR -Building and Sustaining a Strong Service Culture  Note: Reseat Teams; Complete Team Charters	Rick (DSB C112)
	Thursday	12-Jan-23	OPS – Emergency!	Jie (CLE C112)
2	Monday	16-Jan-23	CEM - Integrating Marketing into the Service System & Segmentation in Experience Management	Christian
	Tuesday	17-Jan-23	TM/HR -Aligning People and Performance	Rick
	Thursday	19-Jan-23	OPS– Take Customers' Perspectives	Jie
3	Monday	23-Jan-23	CEM-Design Thinking for Experience Management	Christian
	Tuesday	24-Jan-23	TM/HR -Defining Organizational and Job Competencies ( <b>Case #1: PetSmart/PETCO</b> )	Rick
	Thursday	26-Jan-23	OPS – Design and Improve Process	Jie
4	Monday	30-Jan-23	CEM-Defining Customer Experience Standards	Christian
	Tuesday	31-Jan-23	TM/HR - Sourcing and Acquiring Service Talent ( <b>Case #2: SPARK Schools</b> )	Rick
	Thursday	02-Feb-23	OPS – Deliver Quality	Jie
5	Monday	06-Feb-23	CEM-Consumer Behaviour in Experience Management	Christian
	Tuesday	07-Feb-23	TM/HR -Developing Service Talent ( <b>Case #3: HCL Technologies</b> )	Rick
	Thursday	09-Feb-23	OPS– Analyze process	Jie

6	Monday	13-Feb-23	CEM-Branding in the Experience Economy	Christian
	Tuesday	14-Feb-23	TM/HR -Coaching Clinic ( <b>Case #4: DFS</b> )	Rick
	Thursday	16-Feb-23	OPS– Co-create Value in Services (Live Case Analysis)	Jie
7		20-Feb-23	Family Day	
		21-Feb-23	Reading break	
		23-Feb-23	Reading break	
8	Monday	27-Feb-23	Engaging Service Talent	Rick
	Tuesday	28-Feb-23	CEM-Experience Failures and Service Recovery	Christian
	Thursday	02-Mar-23	OPS– Turnaround Day! (Experiential Game)	Jie
9	Monday	06-Mar-23	SMGT Field Trip – Details TBA	Christian, Jie, Rick
	Tuesday	07-Mar-23	TM/HR -Retaining Service Talent ( <b>Case #5: WestJet</b> )	Rick
	Thursday	09-Mar-23	OPS – Understand Variability	Jie
10	Monday	13-Mar-23	OPS– Manage Lines	Jie
	Tuesday	14-Mar-23	TM/HR - Managing Change, Cross-Cultural HR and HR Analytics ( <b>Case #6: Ruffian Apparel</b> )	Rick
	Thursday	16-Mar-23	OPS– Yield Management (1)	Jie
11	Monday	20-Mar-23	CEM - Gap Analysis/SERVQUAL	Christian
	Tuesday	21-Mar-23	TM/HR - <b>Case #7: Hindustan Unilever; Case #8: CiscoSwitches</b> and Student-Driven Q&A	Rick
	Thursday	23-Mar-23	OPS– Yield Management (2)	Jie
12	Monday	27-Mar-23	CEM– e-Commerce in the Experience Economy	Christian
	Tuesday	28-Mar-23	TM/HR - <b>Talent Management Exam</b>	Rick
	Thursday	30-Mar-23	CEM– Social Media, Mobile Marketing and Experience Management	Christian

13	Monday	03-Apr-23	CEM– The Future of Experience Management	Christian
	Tuesday	04-Apr-23	Consulting Project Team Presentations  *** Consulting Project Paper & Presentation DUE by 8am  Note: 13+5+1=19 minutes per team including transition	ALL - presentation
	Thursday	06-Apr-23	Practitioner Panel, Service Management Module Wrap-Up + Evaluation Time	ALL – panel + CES+ wrap up
Due Dates:				
	5-Feb-23	CEM– Service Anthropologist Group Assignment (due 6 pm on Sunday, February 5)		
	19-Feb-23	OPS – Process Improvement Assignment due midnight		
	28-Mar-23	TM– Final Exam		
	09-Apr-23	OPS– Data Analytics Assignment due midnight		
	5-Mar-23	CEM– Integrating Systems Individual Assignment (due midnight on Sunday, March 5)		
	24-Jan, 31-Jan, 7-Feb, 14-Feb, 7-Mar, 14-Mar, 21-Mar (2)	TM– Case Papers and Case Facilitations (Team)		

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.