A. COURSE DESCRIPTION

Logistics and transportation operations involve getting the right good or service, in the right way, in the right quantity and right quality, in the right place at the right time, for the right customer at the right cost. The growing demand for a broad range of goods and services, the escalation in global trade, the increasing regulation, cost pressures and the worldwide competition are creating the need for greater operational effectiveness and efficiencies for logistics and transportation operations in both services and manufacturing organizations. This course is designed to convey the principles, techniques and methods employed in order to be effective in managing logistics and transportation operations domestically or internationally. Topics explored include strategic management and integration on the global basis of core logistics and transportation activities, functions, and processes; network design and planning; performance metrics; and recent trends in logistics and transportation. The material is organized to enable both participants to appreciate the value offered by a variety of management practices and concepts as means for transforming logistics and transportation operations in order to deliver better results. The format of the course consists of a mixture of lectures exposing the relevant materials, case solving and discussions, presentations to peers, and whenever possible the use of guest speakers and class field trips.

B. COURSE LEARNING OBJECTIVES

Upon completion of this course, students should be able to:

(a) Develop an understanding of the strategic importance of logistics and transportation in the overall process of creating supply chain value, the formation of business strategy and the execution of successful operations.
(b) Develop an understanding of activities, functions, and processes that comprise logistics and transportation; their interrelationship and how they affect customer service, corporate performance and competitive advantage.
(c) Develop an understanding of the role and importance of various key logistics and transportation intermediaries that facilitate global trade.
C. COURSE PREREQUISITES
Third year standing and BUSI 2301 with a grade of C or higher. The School of Business enforces all prerequisites.

D. COURSE MATERIAL

1. Required textbook

There is not a sole textbook for this course. Chapters from the following books will instead be used as references, given their broader fit with the course objectives:

<table>
<thead>
<tr>
<th>Authors and title</th>
<th>Referenced chapters</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) Murphy, P. R., Wood, D. F. (2011): Contemporary Logistics, Tenth edition, Prentice Hall, 311 pages. (Hereafter [MW])</td>
<td>1*, 4, 10*, 11*, 12, and 14</td>
</tr>
</tbody>
</table>

All chapters with (*) will be made available for purchase (means TBA). A small number of reading materials (see section F for more details) will need to be purchased from Harvard Business Publishing (https://cb.hbsp.harvard.edu/cbmp/access/20352637).

2. Class notes and readings
Instructor’s lecture notes will be available for download on the course website (see CuLearn).

D. COURSE EVALUATION

The course evaluation will be based on four main activities: assignments, in-class exercises (including a project simulation exercise), a project risk management exercise and exams. The weighting of each activity is as follows:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Managerial reports (3 equally marked)</td>
<td>40%</td>
</tr>
<tr>
<td>2. Report on in-class exercises (2)</td>
<td>10%</td>
</tr>
<tr>
<td>3. Report and presentation on Canadian transportation industry profile</td>
<td>10%</td>
</tr>
<tr>
<td>4. Final examination</td>
<td>40%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>100%</td>
</tr>
</tbody>
</table>

1. Examination (40%)
The final exam will be closed book, closed-notes. This exam will be comprehensive (i.e., will cover all course materials) and questions will come from readings, homework assignments, in-class exercises, lecture notes. It may consist of multiple-choice, essay questions, mini-case analysis, or problems. University will establish and announce the date for the final exam. No make-up will be given for missing the final exam, except for documented and acceptable emergencies (as defined by university standard). Students are advised that exam papers will not be returned back to them after being marked. They will only be available for consultation at the instructor’s office. More details will be discussed in class.

2. Managerial reports (30%) and presentation (10%)

There will be a total of three managerial reports of quality suitable for consulting practice and a class presentation on one of these managerial reports. Each managerial report will be done in groups (number of students per group still to be determined) and will consist of an in-depth analysis of a case previously discussed in class. It must include (a) a cover letter, (b) an executive summary consisting of the more important results, conclusions, and recommendations; and if needed, (c) the main body consisting of the detailed analysis, answers to the assigned questions, assumptions and analyses that led to these answers. The managerial reports are handed in on the due date at the beginning of each class. The due dates of each managerial report will be announced in class as the term progresses. An initial twenty (20) percentage points penalty applies to a late assignment and an additional ten (10) percentage points per day thereafter. For example, an assignment that would normally merit a grade of 80% would receive a grade of 60% if submitted after the deadline on the due date, 50% if submitted the following day, and so on up to 0%. Students are advised that managerial reports will not be returned back to them after being marked. However, they will be available for consultation at the instructor’s office. Be sure to keep a copy for yourself. The time limit for a revision request is 1 week after the marks are communicated. Although discussions between participants are encouraged, no collaboration is allowed between groups.

3. Report on In-class exercises (10%)

Students in groups will be required to participate in exercises that will be conducted during class time. Each group will be required to submit 2 exercise reports that provide answers to the assigned questions. No make-up will be given for missed exercises.

4. Report and presentation on Canadian transportation industry profile (10%)

Students in groups (number to be determined) will be assigned a sector of the Canadian transportation services (water, pipeline, air, rail, truck) and present a report that outlines, among others, (a) the contributions to the Canadian economy, sector overview (the types of firms operating in the sector, (c) the operating and service characteristics of the sector.

E. CONDUCT

Professional conduct is built upon the idea of mutual respect. Such conduct entails (but is not necessarily limited to):

- **Attending the class.**
  Each class benefits from the attendance and participation of all participants.
  Class attendance is mandatory. The participation grade will be affected by
absences. If any circumstances prevent attendance to the class, the participant is responsible for all materials discussed, handouts distributed, assignments covered, and announcements made.

- **Arriving on time.**
  Late arrivals are disruptive and show disrespect to those who are on time. Late arrivals are not allowed.

- **Minimizing disruptions.**
  Participants are not allowed to leave and re-enter the class. All cell phones and electronic communication devices must be turned off during class. If an emergency situation requires keeping the cell phone turned on, it must be set in the silent mode and it is advised that the instructor be informed prior to the class starting. Participants should also avoid engaging in side conversations after class has begun.

- **Focusing on the class.**
  Participants are not allowed to use laptops or hand-held devices for other tasks than notes taking while in class. Activities such as net surfing, and answering email are very disruptive both to neighbors and to the entire class.

- **Being prepared for class.**
  Participants must be ready to discuss any assigned readings and to answer any assigned questions.

- **Respect.**
  Participants should act respectfully toward all class participants.
# F. Tentative Schedule

<table>
<thead>
<tr>
<th>Unit</th>
<th>Title</th>
<th>Topic(s)</th>
</tr>
</thead>
</table>
| 1    | Course introduction and overview | Course outline  
|      | Logistics - What and Why? | Scope of logistics  
|      |  | Economic impacts of logistics  
|      |  | Logistical relationship within the firm  
|      |  | Organizing logistics within the firm  
|      |  | Professional logistic organizations  |
|      | Readings |  |
|      | [MW]: Chapter 1** |  |
|      | [MW]: Chapter 4 (pp 56-60) |  |
| 2    | Warehousing - design and management | Warehousing facilities value adding role and functionality  
|      |  | Warehousing network designing options  
|      |  | Warehousing tradeoffs  
|      |  | Selecting a warehousing network design  
|      |  | Warehousing ownership arrangements  
|      |  | Warehousing operations  
|      |  | Warehousing management systems  |
|      | Readings: |  |
|      | [MW]: Chapter 10** |  |
|      | [CM]: Chapter 4 [pp 68-86] |  |
|      | Dollar tree logistics case study*** (HBC # UV1418, 17 pages, available for purchase from Harvard Business Publishing) |  |
| 3    | Packaging and material handling | Fundamentals of packaging and material handling  
|      |  | Material handling equipments  |
|      | Readings: |  |
|      | [MW]: Chapter 11** |  |
| 4    | Transportation - Fundamentals | Role of transportation and challenges in carrying this role  
|      |  | Modes of transportation and their performance  
|      |  | Transportation in Canada’s economy  
|      |  | Trade-offs in Transportation design  
<p>|      |  | Tailored transportation  |
|      | Readings: |  |
|      | [CM]: Chapter 14** |  |
|      | [MW]: Chapter 12 |  |
|      | Note on the Canadian transportation industry*** (HBN #906D03, available for purchase from Harvard Business Publishing) |  |
|      | Designing the distribution network for Michael’s hardware (2 pages, see [CM] pp 426-427) |  |</p>
<table>
<thead>
<tr>
<th>Unit</th>
<th>Title</th>
<th>Topic(s)</th>
</tr>
</thead>
</table>
| 6    | o Costing and Pricing for Transportation – a brief introduction | o Market considerations  
o Cost of service pricing  
o Value of service pricing  
o Rate making in Practice  
o Special rates  
o Pricing in transportation management |

Readings
- [CNGB]: Chapter 4**
- Hardee Transportation case study – part A (1 page, see [CNGB] pp 137)
- Hardee Transportation case study – part B (2 pages, see [CNGB] pp 138-139)

| 7    | o Managing logistics internationally - transportation planning | o Overview of global transportation  
o Export preparation activities  
o Transportation planning |

Readings
- [CNGB]: Chapter 10**
- A megapixel opportunity case study (1 page, see [CNGB] p. 355)

| 8    | o Managing logistics internationally - transportation execution | o Overview of global freight flows  
o Global transportation providers  
o Port operations and customs clearance |

Readings
- [CNGB]: Chapter 11**
- As the blade turns case study (1 page, see [CNGB] pp 395)
- Nürnberg Augsburg Maschinenwerke case study (4 pages, to be distributed in class)

| 9    | o Trends in Logistics | o X-/Party logistics (X=3,4,5)  
o Reverse logistics  
o Advance technologies (RFID, virtual warehousing, etc.) |

Readings:
- Deere & Company Worldwide Logistics*** (HBC #901D13, 6 pages, available for purchase from Harvard Business Publishing)

| 10   | o Measuring Logistics performance metrics | o Classification of logistics metrics  
o Issues in logistics metrics  
o [RK]: Chapter 9** |

*Every effort has been made to make the schedule as complete as possible, but there may be occasions where changes are required. The instructor will announce any deviations from the course outline in class.  
** Chapters available for purchase (means TBA).  

G. IMPORTANT ADDITIONAL INFORMATION

**Required calculator in BUSI course examinations**
If you are purchasing a calculator, we recommend any one of the following options:  
Texas Instruments BA II Plus (including Pro Model), Hewlett Packard HP 12C (including Platinum model), Staples Financial Calculator, Sharp EL-738C & Hewlett Packard HP 10bII

**Group work**
The Sprott School of Business encourages group assignments in the school for several reasons. They provide you with opportunities to develop and enhance interpersonal, communication, leadership, follower-ship and other group skills. Group assignments
are also good for learning integrative skills for putting together a complex task. Your professor may assign one or more group tasks/assignments/projects in this course. Before embarking on a specific problem as a group, it is your responsibility to ensure that the problem is meant to be a group assignment and not an individual one.

Medical certificate
Please note that in all occasions that call for a medical certificate you must use or furnish the information demanded in the standard university form. http://www1.carleton.ca/registrar/forms/

In accordance with the Carleton University Undergraduate Calendar (p 34), the letter grades assigned in this course will have the following percentage equivalents:

<table>
<thead>
<tr>
<th>Letter</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A+</td>
<td>90-100</td>
</tr>
<tr>
<td>A</td>
<td>85-89</td>
</tr>
<tr>
<td>A-</td>
<td>80-84</td>
</tr>
<tr>
<td>B+</td>
<td>77-79</td>
</tr>
<tr>
<td>B</td>
<td>73-76</td>
</tr>
<tr>
<td>B-</td>
<td>70-72</td>
</tr>
<tr>
<td>C+</td>
<td>67-69</td>
</tr>
<tr>
<td>C</td>
<td>63-66</td>
</tr>
<tr>
<td>C-</td>
<td>60-62</td>
</tr>
<tr>
<td>D+</td>
<td>57-59</td>
</tr>
<tr>
<td>D</td>
<td>53-56</td>
</tr>
<tr>
<td>D-</td>
<td>50-52</td>
</tr>
<tr>
<td>F</td>
<td>Below 50</td>
</tr>
<tr>
<td>WDN</td>
<td>Withdrawn from the course</td>
</tr>
<tr>
<td>ABS</td>
<td>Student absent from final exam</td>
</tr>
<tr>
<td>DEF</td>
<td>Deferred (See above)</td>
</tr>
<tr>
<td>FND</td>
<td>(Failed, no Deferred) = Student could not pass the course even with 100% on final exam</td>
</tr>
</tbody>
</table>

Academic Regulations, Accommodations, Plagiarism, Etc.
University rules regarding registration, withdrawal, appealing marks, and most anything else you might need to know can be found on the university’s website, here: http://calendar.carleton.ca/undergrad/regulations/academicregulationsoftheuniversity/

Requests for Academic Accommodations

Academic Accommodations for Students with Disabilities

The Paul Menton Centre for Students with Disabilities (PMC) provides services to students with Learning Disabilities (LD), psychiatric/mental health disabilities, Attention Deficit Hyperactivity Disorder (ADHD), Autism Spectrum Disorders (ASD), chronic medical conditions, and impairments in mobility, hearing, and vision. If you have a disability requiring academic accommodations in this course, please contact PMC at 613-520-6608 or pmc@carleton.ca for a formal evaluation. If you are already registered with the PMC, contact your PMC coordinator to send me your Letter of Accommodation at the beginning of the term, and no later than two weeks before the first in-class scheduled test or exam requiring accommodation (if applicable). After requesting accommodation from PMC, meet with me to ensure accommodation arrangements are made. Please consult the PMC website for the deadline to request accommodations for the formally-scheduled exam (if applicable).

- The deadlines for contacting the Paul Menton Centre regarding accommodation for final exams for the December 2013 exam period is November 8, 2013 and for the April 2014 exam period is March 7, 2014.

For Religious Obligations:
Students requesting academic accommodation on the basis of religious obligation should make a formal, written request to their instructors for alternate dates and/or means of satisfying academic requirements. Such requests should be made during the first two weeks of class, or as soon as
possible after the need for accommodation is known to exist, but no later than
two weeks before the compulsory event.
Accommodation is to be worked out directly and on an individual basis between
the student and the instructor(s) involved. Instructors will make
accommodations in a way that avoids academic disadvantage to the student.
Students or instructors who have questions or want to confirm accommodation
eligibility of a religious event or practice may refer to the Equity Services
website for a list of holy days and Carleton's Academic Accommodation
policies, or may contact an Equity Services Advisor in the Equity Services
Department for assistance.

For Pregnancy:
Pregnant students requiring academic accommodations are encouraged to contact
an Equity Advisor in Equity Services to complete a letter of accommodation.
The student must then make an appointment to discuss her needs with the
instructor at least two weeks prior to the first academic event in which it is
anticipated the accommodation will be required.

Academic Integrity
Violations of academic integrity are a serious academic offence. Violations of
academic integrity – presenting another's ideas, arguments, words or images as your
own, using unauthorized material, misrepresentation, fabricating or misrepresenting
research data, unauthorized co-operation or collaboration or completing work for
another student – weaken the quality of the degree and will not be tolerated.
Penalties may include expulsion; suspension from all studies at Carleton; suspension
from full-time studies; a refusal of permission to continue or to register in a
specific degree program; academic probation; and a grade of Failure in the course,
amongst others. Students are expected to familiarize themselves with and follow the
Carleton University Student Academic Integrity Policy which is available, along with
resources for compliance at http://www2.carleton.ca/sasc/advisingcentre/academic-integrity/.

Assistance for Students:
Student Academic Success Centre (SASC): www.carleton.ca/sasc
Writing Tutorial Services: http://www1.carleton.ca/sasc/writing-tutorial-service/
Peer Assisted Study Sessions (PASS): www.carleton.ca/sasc/peer-assisted-study-sessions

Important Information:
- Students must always retain a hard copy of all work that is submitted.
- All final grades are subject to the Dean's approval.
- Please note that you will be able to link your CONNECT (MyCarleton) account to
other non-CONNECT accounts and receive emails from us. However, for us to respond
to your emails, we need to see your full name, CU ID, and the email must be written
from your valid CONNECT address. Therefore, it would be easier to respond to your
inquiries if you would send all email from your connect account. If you do not have
or have yet to activate this account, you may wish to do so by visiting
https://portal.carleton.ca/

H. Undergraduate Academic Calendar (Fall 2013)

September 2, 2013
- Statutory holiday, University closed.
September 3, 2013
- Fall term begins. Orientation for teaching assistants.
September 3-4, 2013
- Academic Orientation. All students are expected to be on campus. Class and laboratory preparations departmental introductions for students and other academic preparation activities will be held.

September 5, 2013
- Fall and fall/winter classes begin.

September 18, 2013
- Last day of registration for fall term and fall/winter courses. Last day to change courses or sections (including auditing) for fall/winter and fall term courses. Last day of registration for fall term and fall/winter courses. Last day to change courses or sections (including auditing) for fall/winter and fall term courses.

September 27-28, 2013
- Summer deferred final examinations to be written. Summer deferred final examinations to be written.

September 30, 2013
- Last day to withdraw from fall term and fall/winter courses with a full fee adjustment.

October 11, 2013
- December examination schedule (fall term final and fall/winter mid-terms) available online.

October 14, 2013
- Statutory holiday, University closed.

October 15, 2013
- Last day for receipt of applications for admission to a degree program for the winter term from applicants whose documents originate from outside Canada or the United States.

October 28-November 1, 2013
- Fall break, no classes.

November 8, 2013
- Last day to submit, to the Paul Menton Centre for Students with Disabilities, Formal Examination Accommodation Forms for December examinations.

November 15, 2013
- Last day for receipt of applications for admission to a degree program for the winter term.

November 25, 2013
- Last day for tests or examinations in courses below the 4000-level before the final examination period (see Examination Regulations in the Academic Regulations of the University section of this Calendar).

December 1, 2013
- Last day for receipt of applications from potential winter (February) graduates.

December 9, 2013
- Fall term ends. Last day of fall-term classes. Last day for academic withdrawal from fall term courses Last day for handing in term work and the last day that can be specified by a course instructor as a due date for term work for fall term courses. Last day for receipt of applications for degree program transfers for winter term.

December 10, 2013
- No classes or examinations take place.

December 11-22, 2013
- Final examinations in fall term courses and mid-term examinations in fall/winter courses may be held. Examinations are normally held all seven days of the week.
December 16, 2013
  • Fall Co-op Work Term Reports due. Fall Co-op Work Term Reports due.
December 22, 2013
  • All take home examinations are due. All take home examinations are due.
December 25, 2013 to January 1, 2014
  • University closed