



**CARLETON UNIVERSITY
SPROTT SCHOOL OF BUSINESS
BUSI 3301A
FALL 2014
SUPPLY CHAIN FUNDAMENTALS**

INSTRUCTOR

Professor: Dr. Rui Zhang
Phone: (613) 520-2388 ext. 3248
Email: rui.zhang5@sprott.carleton.ca
Office: DT 919-1
Office hours: 10:00-11:00 am, Monday (Sept. 15 – Dec. 8, exclusive Oct. 13 and Oct. 27)
Lecture: 11:35 – 2:25 Mondays

COURSE MATERIALS

Required: Simchi-Levi, D., Kaminsky, P., & Simchi-Levi, E., Designing and managing the supply chain: Concepts, strategies, and case studies (3rd Ed.), McGraw-Hill Irwin, New York.
Optional: Stevenson, W.J. & Hojati, M., Operations Management (4th Canadian Ed.), McGraw-Hill Ryerson, Toronto. (You may read it for Lecture “JIT in supply chains”.)

PREREQUISITES

Grade C or higher on BUSI 2301 (or BUSI 3300) and Grade C- or higher on STAT 2606.

COURSE OBJECTIVE

This course addresses advanced topics in supply chain management (SCM); that is the development of a network of supplier, manufacturing, assembly, distribution, and logistics facilities that perform the functions of procurement of materials, transformation of these materials into intermediate and finished products, and the distribution of these products to customers. Students are expected to have a general knowledge of these topics and be able to use critical thinking skills and mathematical tools to solve real life SCM problems.

CLASS CONDUCT

The class time will be taken up by lecturing as well as discussions, exercises, and games. You are expected not only to attend class, but also to be prepared for the problems and exercises on the day assigned. Active participation in class discussions is an important part of this course, and I will therefore feel free to call on anyone in the classroom at any time for analysis, comments, or solutions. Please bring your calculator and textbook to all the classes.

GRADES POLICIES

Final marks will be based on the grading items below. Three bonus marks will be given to the group, which performs best in **Global Sourcing & Logistics Exercise (Item 3)**.

Item	Description	Marks
1	In-class Test	20
2	Case Discussion	10
3	Global Sourcing & Logistics Exercise	5
4	Wood Supply Game	5
5	Group Project	25
6	Take Home Essay Exam	30
7	Attendance for No-duty Classes	5
Total		100

- **In-class Test:** There will be two in-class tests, each of which will take 30 – 60 minutes.
- **Case Discussion:** There will be two case discussions. The discussion questions will be available on CULEARN. Your attendance is required. The evaluation will be based on your contribution during the discussion. (You need to become an "expert" on the cases.)
- **Global Sourcing & Logistics Exercise:** This is a pencil-and-paper simulation. Students will be divided into groups to play the management team of a company that manufactures widgets. During the simulation, a variety of sourcing and offshoring decisions will be considered. At the end, a short report, which answers all the questions, will be required.
- **Wood Supply Game:** This is a computer-based, role-playing game. Students will be divided into groups to play the roles in a forest-manufacture supply chain. During the game, students decide how much to order (or how much to produce) to fulfill the demand and the goal is to minimize total inventory cost. At the end, a short report, which answers all the questions, will be required. Please bring your laptop to the class.
- **Group Project:** This is a semester-long project. Three or four students can form a group. Each group will be assigned to a distinct project, which might be the cases in the textbook. During the semester, students might study together for several times. At the end, a written report (6-8 pages) and an oral presentation (20-30 minutes) are required for each group. Students will be evaluated by their group and individual marks. Group marks are based on the report and presentation. Individual marks are based on the performance of the student during the presentation and the peer-evaluation between group members. (Students will be required to submit a short note on the contributions of each group member to the project.)
- **Take Home Essay Exam:** There will be one take-home essay exam in December.
- **Attendance for No-duty Classes:** Attendance and Participation is an integral part of this course. Failure to attend classes on a regular basis may reduce your overall grade by five marks. Class absence is required to be discussed with the instructor in advance.
- **Important Remarks:** Make-up test (without penalty) will be allowed only if students can provide the instructor a university-sanctioned excuse for their absence. The same instruction is required when a student cannot attend an on-duty (participation-required)

class. The mark of participation duty will be transferred to other evaluation items. Failure to notify the absence to the instructor before the class will result in the loss of the marks.

COURSE SCHEDULE

The following lists the material to be covered during the semester. Note that schedules are subject to changes. It is imperative for students to attend all the classes and be aware of any new developments in class that may affect the scheduling of the lectures.

No	Date	Subject	Reading
1	Sept. 8 th	Introduction to supply chain	Ch.1
		<i>Group Project I: Introduction</i>	
2	Sept. 15 th	Inventory management and risk pooling	Ch.2
		<i>Group Project II: Assignment Due</i>	
3	Sept. 22 nd	Supply contract	Ch.4
		<i>Case I: Reebok NFL Replica Jerseys: A Case for Postponement</i>	
4	Sept. 29 th	Network planning	Ch.3
		<i>Test I: Materials covered in Lecture 1, 2 and 3</i>	
5	Oct. 6 th	JIT in supply chains	*
		Supply chain integration	Ch.6
6	Oct. 13 th	No Lecture due to Statutory holiday (University Closed)	
7	Oct. 20 th	Strategic alliance	Ch.8
		<i>Case II: How Kimberly-Clark Keeps Costco in Diapers</i>	
8	Oct. 27 th	No Lecture due to Fall Break (Classes Suspended)	
9	Nov. 3 rd	Distribution	Ch.7
		<i>Test II: Materials covered in Lecture 4, 5 and 7</i>	
11	Nov. 10 th	Global logistics and risk management	Ch.10
		<i>Exercise I: Global Sourcing & Logistics</i>	
12	Nov. 17 th	Coordinated product and supply chain design	Ch.11
		Customer value	Ch.12
13	Nov. 24 th	Bull whip effects	Ch.5
		<i>Exercise II: Wood Supply Game</i>	
14	Dec. 1 st	Procurement and outsourcing strategy	Ch.9
		Information technology	Ch.14
15	Dec. 8 th	Group Project Presentation (Project Report Due)	

* The optional textbook at the beginning of this course outline is the reading material.

GENERAL INFOREMATIION

Required Calculator in BUSI Course Examinations If you are purchasing a calculator, One of the followings is recommended: Texas Instruments BA II Plus (Pro Model), Staples Financial Calculator, Sharp EL-738C, Hewlett Packard HP 10bII and 12C (Platinum model).

Group Work Group assignments are encouraged 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.

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

A+ = 90-100	B+ = 77-79	C+ = 67-69	D+ = 57-59
A = 85-89	B = 73-76	C = 63-66	D = 53-56
A - = 80-84	B - = 70-72	C - = 60-62	D - = 50-52
F = Below 50		WDN = Withdrawn from the course	
DEF = Deferred		ABS = Student absent from final exam	
FND (Failed no DEF) = Students cannot pass the course even with 100% on final exam			

Academic Regulations, Accommodations, Plagiarism, and Etc. University rules regarding registration, withdrawal, appealing marks, and most anything else you need to know can be found <http://calendar.carleton.ca/undergrad/regulations/academicregulationsoftheuniversity/>.

Requests for 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 deadline for contacting the Paul Menton Centre regarding accommodation for final exams for the December 2014 exam period is November 7, 2014.

For Students with 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 Students with 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 the university website: <http://www2.carleton.ca/sasc/advisingcentre/academic-integrity/>.

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

IMPORTANT: 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, do so by visiting <https://portal.carleton.ca/>

IMPORTANT DATES (FALL 2014)

- September 2:** Fall Term Begins.
Orientation for Teaching Assistants.
- September 2-3:** 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 4:** Fall and fall/winter classes begin.
- September 17:** 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 26-28:** Summer deferred final examinations to be held.
- September 30:** Last day to withdraw from Fall term and Fall/Winter courses with a full fee adjustment. Withdrawals after this date will create no financial change to Fall term fees (financial withdrawal).
- October 10:** December examination schedule (fall term final and fall/winter mid-terms) available online.
- October 13:** Statutory holiday, University is closed.
- October 27-31:** Fall break. Classes are suspended.
- November 7:** Last day to submit, to the Paul Menton Centre for Students with Disabilities, Formal Examination Accommodation Forms for December examinations.
- November 24:** Last day for tests or examinations in courses below the 4000-level before the final examination period (see Examinations Regulations in the Academic Regulations of the University section of the calendar).
- December 8:** 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.
- December 9:** No classes or examinations take place.
- December 10–21:** 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 21:** All take home examinations are due.
- December 25 to January 2 (2015):** University is closed.
-