



**CARLETON UNIVERSITY
BUSINESS
4105
2019/WINTER
MANAGING CHANGE**

Instructor: Rebecca Stiles

Office: DT 1009

Office Hours: Tuesdays, 12:30pm - 14:30pm

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Course meets: Tuesdays, 8:35am – 11:25am

Pre-requisites & precluded Courses: Third-year standing and BUSI 2101 or BUSI 2702 or BUSI 3602 with a grade of C- or higher.

Course Calendar description from the 2018/2019 University calendar:

An overview of current thinking about change management. Topics covered include understanding the forces for and barriers to change, diagnosing the environment around change and implementing change.

Course Description:

Change is an integral aspect of organizational life. The ability to effectively manage change is a distinguishing characteristic of successful leaders and organizations. In this course we examine the theoretical basis for organizational change and their practical application, primarily through the extensive use of case studies.

Learning Objectives:

- Develop an understanding of the processes through which change happens. This includes the ability to...
 - Categorize an organisational change by change type
 - Compare various organisational change theories
 - Describe the key stages of the change process
 - Evaluate past organizational change
- Develop key change agent competencies. This includes the ability to...
 - Assess organisational change needs
 - Determine the barriers and drivers of change
 - Develop plans to achieve meaningful organisational change
 - Apply change implementation theories appropriately
 - Design change assessment criteria
- Engage in personal reflection on change and the application of learning to “real life.”

Readings & Textbook:

- Cawsey, T., Deszca, G. & C. Ingols (2015) Toolkit for Organizational Change, 3rd edition. Los Angeles: Sage. Available at the Carleton Bookstore
- Coursepack, Harvard Business Review (purchase for \$29.75 at <https://hbsp.harvard.edu/import/588799>)
- Additional readings in the class schedule are available from *Ares* on the course CuLearn page

Course Requirements & Methods of Evaluation:

A. Discussion preparation and participation	10%
B. Experiencing change assignment	25%
○ Change experience essay (5%)	15 January
○ Peer analysis (10%)	29 January
○ Reflective response (10%)	12 February
C. Topics in organizational change group assignment	20%
○ Choose groups and register on CuLearn	by 12 February
○ In-class presentations	19 March
D. Capstone organizational change project	45%
○ Organizational change proposal (5%)	05 February
○ Organizational change analysis (15%)	05 March
○ Organizational change plan (15%)	09 April
○ Organizational change poster (10%)	09 April

Course Expectations:

A. Participation: This is not only an advanced course, but also a case-based course, therefore active class participation is considered essential to your learning experience. Participation in this course is defined broadly. It includes attendance at class, as well as the quality and quantity of contribution made in the class sessions. Therefore, unless affected by medical circumstances accompanied by documentation (doctors note or the like) students are required to attend every scheduled class. Also, students are expected to come to class having completed the assigned reading and preparing the relevant case. Review these materials prior to class and be prepared to discuss them in-depth.

Harvard professor David Garvin, an expert case teacher and writer, says that "a case is a literary form intended to be discussed. A case does not fully achieve its purpose until students talk about it, just as the script of a play realizes its purpose when performed on stage." *Therefore, Students must come to class prepared to discuss the assigned case.* Specifically, they need to be prepared to say what they think the decision should be, to articulate how the problem ought to be solved, and to defend their solution thoroughly, insightfully, and persuasively using data from the case.

Students will be marked on the quality of their comments and their discussion with their peers. *It is required that each student give at least one comment in each class.* However, determining the amount of participation, however, can be complicated and may be open to dispute. In order to avoid conflict, and to promote fairness and transparency, students are required to self-assess their participation by filling in a self-assessment sheet after each class and handing it in on their way out. This will also be considered proof of attendance and, in conjunction with the instructors notes and observations, be the basis for the student's participation mark. At the end of the term, an average participation score for each student will be calculated and a grade will be assign based on this average.

**Communication:* Generally, email is the best method for communication between instructor and student. However, emails must be written from a valid Carleton address or they will not be answered. So, please send all email inquiries from your Carleton email account and include your *full name* in the email so there is no confusion. Also, responses to inquiries will be faster if the course name is in the subject line.

B. Experiencing Change Assignment: This assignment is intended to get students thinking about change, how it impacts them personally, and how change management theory can be applied to real world situations. It consists of three parts:

1. Students will write a short 3-5 page personal reflection essay on a change that they have recently experienced. They will be asked to describe the change, the reason for the change, how they felt about the change, how they managed the change, and the process of the change. Keep in mind when preparing the content that this assignment will be read by another student in the class, as well as the instructor, so please keep the material appropriate for a professional and public setting. Also, please bring in two copies of the assignment to class, one with your name and student number, and one without. The copy without your name will be randomly assigned to another student in the class for them to analyze.
2. Students will be randomly given a classmate's essay to analyze using the material covered in the first three classes. They will hand in a 4-5 page report that shows how the change experience relates (or not) to the material discussed in the first three weeks of class. This assignment is NOT an evaluative judgment of the change experience. As such, students are NOT to comment on the quality or content of the essay they are analyzing but are to consider it as a mini-case study, a frame upon which to hang the theories and concepts that have been covered in class. Again, students will bring in two copies of their analysis, one with their name and student number for the instructor, and one without their name which will be attached to their peer's essay.
3. The peer assessment, along with the instructor's comments, will then be given back to the author of the original essay so that they can reflect on their change experience, the analysis of their peer, and the instructor's comments. They will then write a 3-4 page reflective response which will include their own critical evaluation of the change they shared, including their lessons learned and suggestions on how they might adapt their approach to change in accordance with topics discussed in class. Only one copy, with their name and

student number, will be handed in to the instructor along with the previous 2 assignments.

This assignment will be further discussed in class to ensure clarity. Also, a more specific rubric for this assignment, and an example, will be posted on CuLearn.

C. Topics in Organizational Change Group Assignment: Create a team of 4-5 people. You and your team will select a relevant change related issue, research and summarize a set of articles that shed light on the topic, critique what you find and discuss the practical and research implications. You will then present these findings in class.

1. Choose your team, select an organizational change issue that you see as important, and sign-up on CuLearn (by 12 February).
2. Summarize/review 4 or 5 significant theoretical or empirical articles, **or** significant journalistic pieces, that are related to your topic of choice. Note that *one* of them can be significant Video content (e.g., a speaker, Ted Talk, or documentary) that speaks to this important issue.
3. Make sure you offer your critical assessment of what you have read (or seen) and how it relates to your topic and the relevant course material.
4. Address the "**so what**" question which is how does this material you reviewed help you when thinking about the particular organizational change issue you set out to better understand? What have you learned?
5. Ensure that all sources are referenced and that a bibliographic slide is present.

The deliverable is a 10 minute power point presentation which will be presented in class on 19 March. Overtime presentations will be penalized. The presentations need to be uploaded to CuLearn *by midnight the Monday before* they will be presented (18 March). The order of the presentations will be determined collaboratively in advance. A more specific rubric for this assignment will be posted on CuLearn.

**Note:* When it comes to articles to review, choose high quality sources. Stay away from the 2-3 page advice pieces, written by consultants attempting to sell their services. Make sure you reference sources so that class members and the instructor can access the materials.

D. Capstone Organizational Change Project: Students must develop and actively pursue a project to accomplish a meaningful, worthwhile change. Projects must strive to create a change in a process, system, or structure within the community, a business or nonprofit organization, government institution, or the university. This does not need to be a large transformational change, but it does need to be significant. The project must meet two basic criteria:

- a. It must show promise of being a worthwhile learning experience, and
- b. It must have some societal value. Projects will not be approved if they will be only disruptive or if they are trivial.

You are encouraged to select a project that you personally value and a goal for which you have a genuine concern that goes beyond a simple need to fulfil a course requirement. The projects are too much work for you to be involved in something you don't care about! It is intended that

you will engage with the change project through field work so that you can gain a clear and in-depth knowledge about the context of the change project and the intended outcomes. Your goal should be to gain a level of detailed understanding commensurate with the case studies we discuss in class. It is hoped that you will take steps to begin to implement the proposed change, however, the short duration of the course makes it difficult to see most change initiatives to completion. Nevertheless, it is intended that you pursue the project as if you are able to complete it, and perhaps you will gain enough passion for it that after the course ends, you will!

This assignment has four parts:

1. A 1-2 page project proposal which will include a concise statement of what the change project is and why it is important, including a brief plan of what you think has to be done to achieve the change and a statement of how you will measure whether the change has been accomplished.
2. The student will conduct a comprehensive change analysis including the need for change, the readiness for change, stakeholder analysis, power analysis, and force field analysis. They will also include a vision statement for the change. This report should be between 7-10 pages and reference specific material from the course.
3. The final report will relate the change project to theory and present an action plan for implementation of the change. This needs to be specific and should be between 12-15 pages. The report will also include an evaluation of any actions taken in pursuit of the change and a proposed method of evaluating the future success of the change.
4. On the last day of class, students will bring in a poster displaying their change project. (The use of posters in academia is common. Carleton and OttawaU host annual research poster competitions for graduate students)

Students are encouraged to talk to the professor about their project ideas as early as possible.

This assignment will be further discussed in class to ensure clarity. Also, a more specific rubric for this assignment, as well as poster examples, will be posted on CuLearn.

****Special notes regarding assignments***

- Assignments are to be printed and handed-in at the beginning of class the week they are due, unless otherwise stipulated.
 - Deadlines are strict. Failure to meet deadlines will result in grade penalties of 5% per day. Assignments more than 7 days late will be considered missed.
 - Students must always retain a hard copy of all work that is submitted.
 - Note that the granting of student requests for any term work deferral must conform to University Rules. See section 2.6 Deferred Term Work at:
<http://calendar.carleton.ca/undergrad/regulations/academicregulationsoftheuniversity/acadregsuniv2/#2.6>
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- The quality of your writing is an important component of effectively presenting your ideas and poor writing will result in marks lost. If you need coaching on your writing skills, help is available at the writing tutorial service – <http://www1.carleton.ca/sasc/writing-tutorial-service>

Course Schedule:

Date	Topic	Student Preparation
08 Jan	What is Change Management?	Read: <u>Toolkit</u> , Ch.1
15 Jan	Theories of Change	DUE: Change Experience Essay (2 copies, one without your name) Read: <u>Toolkit</u> , Ch.2 Case: <i>Morita's Legacy and International Strategy at Sony</i> (HBR Coursepack)
22 Jan	Recognizing the Need for Change	Read: <u>Toolkit</u> , Ch. 3 Read: Anand, N., & Barsou, Jean-Louis. (2017). What everyone gets wrong about change management. <i>Harvard Business Review</i> . 95(6), 78-85. (CuLearn) Case: <i>Oshwaw Industries</i> (CuLearn)
29 Jan	Readiness for Change	DUE: Peer Analysis Read: <u>Toolkit</u> , Ch.4 Case: <i>Radio Station WEEA</i> (Coursepack)
05 Feb	Navigating Change: Structure & Systems	DUE: Organisational Change Proposal Read: <u>Toolkit</u> , Ch. 5 Case: <i>Food Banks Canada</i> (textbook)
12 Feb	Navigating Change: Culture & Politics	DUE: Reflective Response * Groups and topics must be registered on CuLearn by today Read: <u>Toolkit</u> , Ch.6 Read: Lorsch, J.W., & McTague, E. (2016). Culture is not the culprit. <i>Harvard Business Review</i> , 94(4), 96-105. (CuLearn) Case: <i>TerraNova Consulting</i> (textbook)
WINTER BREAK: 18-22 February		
26 Feb	The Change Process in Action	zero, zip, zilch, nada

Date	Topic	Student Preparation
05 Mar	Recipients of Change	DUE: Organisational Change Analysis Read: <u>Toolkit</u> , Ch.7 Read: Kegan, R., & Laskow, L. (2001). The real reason people won't change. <i>Harvard Business Review</i> , 79(10), 85-92. (CuLearn) Case: <i>Travelink Solutions</i> (CuLearn)
12 Mar	Change Agents	Read: <u>Toolkit</u> , Ch.8 Case: <i>Anadarko Petroleum Corporation</i> (Coursepack)
19 Mar	Topics in Organizational Change	DUE: Group Presentations *Power point slides must be uploaded to CULearn by midnight the day before, 18 Mar.
26 Mar	Action Planning & Implementation	Read: <u>Toolkit</u> , Ch.9 Read: Sirkin, Harold L. (2005). The hard side of change management. <i>Harvard Business Review</i> . (83)10. 108-115. (CuLearn) Case: <i>Robin Ash and Printzhof Press</i> (Coursepack)
02 April	Measuring & Controlling Change	Read: <u>Toolkit</u> , Ch.10 Read: Making Process Improvements Stick (HBR Coursepack) Case: <i>Self-Managed Work Teams at SAAS</i> (on CuLearn)
09 April	Bringing It All Together & Pot Luck	DUE: Poster Presentations DUE: Organisational Change Plan Read: <u>Toolkit</u> , Ch.11 Read: All Management is Change Management (Coursepack) Read: Kotter, J.P. (2007). Leading change: why transformation efforts fail. <i>Harvard Business Review</i> , 85(1), 96 – 103 (CuLearn)

Additional Information

Course Sharing Websites

Materials created for this course (including presentations and posted notes, labs, case studies, assignments and exams) remain the intellectual property of the author(s). They are intended for

personal use and may not be reproduced or redistributed without prior written consent of the author(s).

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.

Satisfactory In-term Performance

1. Unless otherwise stated below in item #2, the requirement for Satisfactory In-term Performance is set at 50% of all, not each, pre-final term work (i.e. assignments, participation marks, tests etc.).
2. Unsatisfactory In-term Performance in this course will lead to failure in this course (regardless of the performance at the Final exam or final project)
Yes **X** No
3. FND grade in this course (in case of missed Final exam or project)
Yes **X** No

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			

Grades entered by Registrar:

WDN = Withdrawn from the course

DEF = Deferred

FND = Failure with No Deferral (To reduce instances of miscommunication Carleton introduced a grade FND to be assigned to students who fail to meet the minimum in-term performance standards explicitly set out in the outline and applied consistently (i.e., there is no other hidden criteria).

Academic Regulations

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 Accommodation

You may need special arrangements to meet your academic obligations during the term. For an accommodation request, the processes are as follows:

Pregnancy obligation

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, visit the Equity Services website: carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf

Religious obligation

Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. For more details, visit the Equity Services website: carleton.ca/equity/wp-content/uploads/Student-Guide-to-Academic-Accommodation.pdf

Academic Accommodations for Students with Disabilities

If you have a documented disability requiring academic accommodations in this course, please contact the Paul Menton Centre for Students with Disabilities (PMC) at 613-520-6608 or pmc@carleton.ca for a formal evaluation or contact your PMC coordinator to send your instructor your Letter of Accommodation at the beginning of the term. You must also contact the PMC 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 your instructor as soon as possible to ensure accommodation arrangements are made. carleton.ca/pmc

Survivors of Sexual Violence

As a community, Carleton University is committed to maintaining a positive learning, working and living environment where sexual violence will not be tolerated, and its survivors are supported through academic accommodations as per Carleton's Sexual Violence Policy. For more information about the services available at the university and to obtain information about sexual violence and/or support, visit: carleton.ca/sexual-violence-support

Accommodation for Student Activities

Carleton University recognizes the substantial benefits, both to the individual student and for the university, that result from a student participating in activities beyond the classroom experience. Reasonable accommodation must be provided to students who compete or perform at the national or international level. Please contact your instructor with any requests for academic accommodation during the first two weeks of class, or as soon as possible after the need for accommodation is known to exist. <https://carleton.ca/senate/wp-content/uploads/Accommodation-for-Student-Activities-1.pdf>

For more information on academic accommodation, please contact the departmental administrator or visit: students.carleton.ca/course-outline

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; a grade of Failure on the submitted work and/or course; academic probation; a refusal of permission to continue or to register in a specific degree program; suspension from full-time studies; suspension from all studies at Carleton; expulsion from Carleton, 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: <https://carleton.ca/registrar/academic-integrity/>.

Sprott Student Services

The Sprott student services office, located in 710 Dunton Tower, offers academic advising, study skills advising, and overall academic success support. If you are having a difficult time with this course or others, or just need some guidance on how to successfully complete your Sprott degree, please drop in any weekday between 8:30am and 4:30pm. Our advisors are happy to discuss grades, course selection, tutoring, concentrations, and will ensure that you get connected with the resources you need to succeed! <http://sprott.carleton.ca/students/undergraduate/learning-support/>

Centre for Student Academic Support

The Centre for Student Academic Support (CSAS) is a centralized collection of learning support services designed to help students achieve their goals and improve their learning both inside and outside the classroom. CSAS offers academic assistance with course content, academic writing and skills development. Visit CSAS on the 4th floor of MacOdrum Library or online at: carleton.ca/csas.

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.
 - 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 CARLETON address. Therefore, in order to respond to your inquiries, please send all email from your Carleton CMail account. If you do not have or have yet to activate this account, you may wish to do so by visiting <http://carleton.ca/ccs/students/>
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