STGY 5900 A & B - Corporate and Business Strategy - Fall 2016

Class Schedule:

<table>
<thead>
<tr>
<th>Section A:</th>
<th>Classroom TBA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thursdays</td>
<td>11:35 to 2:25 pm</td>
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<table>
<thead>
<tr>
<th>Section B:</th>
<th>Classroom: TBA</th>
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<tbody>
<tr>
<td>Wednesdays</td>
<td>2:35-5:25 pm</td>
</tr>
</tbody>
</table>

Professor:
Laura Ierfino-Blachford, PhD, MBA

- Office: TBA
- Email: laura.ierfinoblachford@carleton.ca
- Office Hours: TBA or by appointment

Graduate Calendar Description
Strategic management focuses on the evaluation of environmental opportunities and threats in the external environment and the analysis of strengths and weaknesses in the organization's value chain, in order to determine core competencies as the foundation for a sustainable competitive advantage. Company Capstone Project required.

Course Description:
Strategic management’s focus on corporate and business level strategic analysis, and strategy formulation and implementation is a critical managerial tool in any organizational setting. Strategic management emphasizes the determination and evaluation of environmental opportunities and threats in light of strengths and weaknesses in the organization’s value chain in order to enhance its core competencies and craft a sustainable competitive advantage.

Students will apply their knowledge and strategic tools to business case analyses to formulate strategy. Furthermore, each student must select a firm and develop a comprehensive strategic analysis of the firm. Students are expected to analyse, identify, and evaluate opportunities and threats in the firm’s economic, technological, demographic/social cultural, and political-legal environments as well as industry(ies) in light of identified strengths and weaknesses in the organization’s value chain, in order to craft a sustainable competitive advantage by recommending changes to that specific firm's strategy. Emphasis is on corporate and business level strategic analysis and strategy formulation.
Course Learning Objectives:
1. To familiarize the student with strategic thinking and its component elements, the identification of strategic options and techniques for strategy selection.
2. To understand key strategic concepts such as corporate strategy, business strategy, driving forces, key success factors, value chain analysis, core competencies and sustainable competitive advantage.
3. To apply strategic analysis to business case studies, focusing on formulating strategic recommendations.
4. To integrate the functional knowledge acquired in past business courses by applying those functional skills to analyse a single firm and recommend appropriate strategies.
5. To significantly enhance applied business research skills as well as presentation skills.

Course Prerequisites: All other MBA core courses must be successfully completed with a grade of B- or better. The Sprott School of Business enforces all prerequisites.

Required Text and Other Reading Material:


Cases and Journal Articles:
Cases may be procured directly from Ivey Publishing (https://www.iveycases.com/) or Harvard Business Publishing (http://hbr.org/case-studies). Required journal article readings may be found at the Library.

Do not purchase cases in advance of them being confirmed in class and do pay attention to the publisher’s availability conditions to not have your access expire.

Newsletters and Publications:
Students are asked to subscribe to the following free business newsletters to which references will be made as applicable throughout the course:

pwc (booz & co.) – http://www.strategy-business.com/registration/register

Exam Date: Take home individual case due by start of class November 9th (Wednesday class) or November 10th (Thursday class).
The Course Drop Policy:
The deadline for academic withdrawal is the last day of classes (each term).

Deferred Final Examination:
Students unable to write a final examination because of illness or other circumstances beyond their control must contact the instructor and the MBA office in writing to request a deferred exam. Permission may be granted when the absence is supported by a medical certificate and or appropriate document/s to support the reason for the deferral.

Grading Scheme (Note this is a 0.5 credit course):

<table>
<thead>
<tr>
<th>Individually earned grades:</th>
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<tbody>
<tr>
<td>Take home individual case exam – <strong>no group discussion permitted</strong></td>
<td>20%</td>
</tr>
<tr>
<td>Contribution to peer learning – professor assessment</td>
<td>15%</td>
</tr>
<tr>
<td>Critique (details posted cuLearn)</td>
<td>10%</td>
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</table>

<table>
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<tr>
<th>Group earned grades:</th>
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<tbody>
<tr>
<td>Capstone project:</td>
<td></td>
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<tr>
<td>2 Drafts (external analysis draft worth 5%; internal analysis and corporate/business strategy problems and recommendations worth 10%)</td>
<td>15%</td>
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<tr>
<td>Presentation</td>
<td>10%</td>
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<tr>
<td>Written report (Due one week after presentation)</td>
<td>30%</td>
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<td>Total</td>
<td>100%</td>
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Criteria for Evaluation and Grading:
Paper copies of written assignments are due at the beginning of class. If the student is unable to attend class, it is the student’s responsibility to ensure the the professor receives this copy prior to the deadline. In addition, an electronic copy must be deposited to cuLearn within the same day.

Each component of a student’s grade will be assigned a letter grade score. A student’s final course grade will be a weighted average of each of these components.

Late Penalties: For any assignment and report, late penalties will be decided at the professor’s discretion. For the take home exam, no late submission will be accepted without medical certification.

Class Discussions and Contributions to Peer Learning:
Students are encouraged to actively participate in all classes by being adequately prepared (i.e. having attentively read and reflected on the text chapters and any other assigned readings/cases). Regular attendance, participation and contribution from all class members is essential for effective discussion. It is student contribution to peer learning that constitutes a contribution, including encouraging colleagues, building on earlier
comments without repeating, listening attentively to speakers and being respectful of differences of opinion.

While attendance is a pre-requisite to participation, it is the quality, not the quantity, of remarks that earns the grades. Meaningful contribution requires that you teach your peers something useful that might otherwise have gone unnoticed. A discrete use of electronic devices for note-taking is permitted, however no distractions will be tolerated.

It is also recognized that on some days there may be insufficient time for me to call upon each student who wishes to speak. Any such demonstration of desire to participate will also be considered in the overall assessment of class contribution.

In addition, students will be asked to form groups to discuss cases in class. For example, a group may be asked to present a short summation of the case situation, provide the highlights of their analysis using a particular framework, debate from the perspective of various stakeholders, etc. Also, to provide an opportunity to more closely interact with other classmates, students may be assigned to case discussion groups which will vary from class to class. Students’ engagement, demonstration of preparedness and quality of discussions will be observed as the professor circulates. All of these verbal contributions will be factored into the individual class contribution grade.

**Groups:**
Students will be required to form groups of a maximum of 5 students (dependent upon class size, exceptionally a group of 6 may be permitted or a student without a group may be assigned to a group or a student may be asked to switch groups, all at the professor’s discretion). These groups will collectively carry out group assignments with the major deliverable being the Capstone report.

Students are responsible for selecting their group partners and the group is expected to self-govern to ensure the quality of all deliverables, independently resolving any conflicts within the group. It is strongly recommended that students seek diversified and complementary skill sets in their prospective group partners, ideally students from different academic concentrations with varied work experiences and backgrounds. Further information on effective group formation and processes will be discussed at the first class.

The group assignments provide students with opportunities to develop and enhance interpersonal, communication, leadership, follower-ship and other group skills. The resources at [http://sprott.carleton.co/wp-content/files/Group-Work-Resources.pdf](http://sprott.carleton.co/wp-content/files/Group-Work-Resources.pdf) are recommended. Students are particularly encouraged to maintain evidence of their contribution to the group performance, including estimated research time, working papers, etc. The keeping of a group log of meetings, commitments, decisions, etc. is also a valuable organizational tool. It is in each group member’s best interest to ensure an equitable sharing of the research and work.
A peer evaluation for the final Capstone project report will be required from all students, and will be taken very seriously in assigning grades. For instance, up to 5% may be deducted from a student’s final grade if he or she received a poor peer evaluation from the majority of members in the group.

**Group Conflict:**
Group members are encouraged to independently resolve any conflicts, however in the event of an irreconcilable conflict, as a last resort, group members may request that the group be broken into multiple groups. Each of these reconstituted groups will share ownership of any already submitted material on which all their names appear and will continue to analyse the same Capstone firm. However, each group will present separately without witnessing the other group’s presentation, and each group will be evaluated by the same criteria applicable to all groups (i.e. the increased work load of fewer group members will not be a consideration in grading).

An interim 1 page report on the quality of the group progress on the Capstone report is to be submitted after class 6, **October 12th (for Wednesday class)** or **October 13th (Thursday class)**. Details to be discussed in class.

**Policy for Group Presentations:**
All group members must participate in the presentations. Any student unable to do so because of illness or other circumstances beyond their control must contact the professor via email prior to the start of the class for which the presentation is scheduled. The professor may allow an alternative individual assignment when the absence is supported by a medical certificate and or appropriate document(s) to support the reason for the inability to present. Any student missing the presentation would not obtain any grades for the group work. The other group members must make the entire presentation as scheduled.

*Video Recording of Presentations*
As part of the Assurance of Learning process of AACSB accreditation, the School may periodically evaluate, among other things, presentation skills. Accordingly, student group presentations may be recorded to provide material for such assessment; however this has no impact at all on the course grade.

**BUSINESS RESEARCH GUIDELINES & CAPSTONE PROJECT:**

**Organizational Field Study:**
New - Student groups are expected to research an organization in the field. If an organization in the field cannot be used as a subject, student groups can also research a publicly traded firm (e.g., financial statements available for at least 3 of the most recent years available). Strategic field projects can benefit firms by providing them with a comprehensive strategic analysis and alternatives as well as students by enabling them to gain hands on experience.

Student groups that would like perform a field study must find their own firms. Students
are also responsible to ensure that the company will provide the information required to perform the research project. Because we work with concepts that analyze for profit firms, firms chosen for research projects ideally should be for profit firms. If students would like to research a firm in the field that is not a for profit firm, please make an appointment with the professor in the first few weeks of class to discuss whether the firm is a viable option for the STGY5900 research project. If need be, firms may be discussed on a case by case basis. For all groups, the professor will be acting as an advisor and will provide at times research and analysis suggestions that are customized for the research firm.

Students that would like conduct research on a firm in the field must ensure the following information is available or could be attained in order to successfully complete the research project:

1. Company Information — company description which includes its products/services, history, financial results, organization, key people, and its goals. Student groups must find a company that will provide at least 2 to 3 years of the most recent annual financial statements or information available.

2. External and Internal Assessment — Ensure that there is an opportunity to attain information on the company’s industry(ies) competitors, demand trends, segments, changing technology and customer needs. Data on most industries and general environmental factors (e.g., disruptive technologies and economic) is usually available via the library through such primary sources as Bloomberg. However, in order to assess the strengths and weaknesses of any firm, students must have information about its competitors. Therefore, I would encourage groups to also ensure that there are at least 1 to 3 competitors and/or metrics (from external sources) that could be used to compare a focal firm to in terms of such factors as financial performance (e.g., available financial statement data for competitors/comparable organizations and/or industry average(s) ideally for the most recent 3 years).

3. Preliminary Strategic Assessment — For firms located in the field, ensure that enough information is available to assess the following: 1) What business is it in? 2) What are its goals? 3) Is it successful and why (e.g., metrics such as financial statements for past 2 to 3 years are available to perform analysis)? 4) What is its current strategy [e.g., product/market scope, competitive differentiation, or business model (how it makes profit)]? 5) What is happening internally or externally that might affect its future success (e.g., again, data for external environment could potentially be found in primary sources from library)? 6) What are the key issues and options for this organization?

4. Consider research sources including the firm itself before choosing a firm to ensure that the information required to perform the research report is available (in particular, financial statements/information for a focal firm for ideally the past 3 years).

For those student groups that would like to work with a firm in the field, the group is encouraged to make the arrangement with the firm prior to the start of the course or at latest, by the fourth week of class. Students must attain at least the financial statements or information from the firm in the first few weeks of the class to ensure that studying that
Eligibility of Firm for Capstone Project

Field and Publically Traded Firm Studies:
- firms researched in other classes are eligible. However, students are reminded it is a violation of academic plagiarism policy to submit substantially the same analysis used for multiple courses.
- it is the group’s responsibility to ensure that there is sufficient information to complete all the required analyses for the Capstone report. Particular attention should be given to ensuring the availability of competitor information and/or industry averages for various metrics (a sufficient number of publicly listed and comparable firms) to perform industry analyses. For instance, are there any comparable firms that publish their financial statements and/or industry averages to calculate key financial ratios (e.g., operating expense, gross margin, or advertising expense)?
- selecting a firm of interest to the group is encouraged.
- The entire firm should be analyzed (highly diversified and multinational firms) should be avoided.
- For field studies, students are required to meet with the professor to discuss eligibility and requirements of field study.
- Please note that the information above may be subject to revision and/or additional requirements may apply.

For Publically Traded Firm Studies:
- For for profit firms, the firm must currently be publicly listed (i.e. TSX, NYSE, NASDAC) and have at least 3 years of comparable market/financial performance statistics publicly available:
  - government departments, agencies & crown corporations are NOT eligible;
  - not-for-profit organizations (NGOs) are NOT eligible for selection;
  - bankrupt, delisted firms or privately held firms are NOT eligible;
  - firms with concentrated ownership or whose shares seldom trade are NOT eligible.
  - A firm that has announced major restructuring since its last financial statements; has filed for Chapter 11 reorganization.
- the entire firm MUST be analyzed – not a division or subsidiary, and must include all markets within which the firm operates (i.e. diversified multinationals should be avoided).
- Details regarding Publically Traded Firm Research Studies will be posted on cuLearn.

Further Information for Field and Publically Traded Firm Studies:
There are significant research resources available to students at Carleton. Students are encouraged to become familiar with the various databases available through the library as
well as financial tools such as Bloomberg and Datastream (a tutorial will be offered during class). See this course’s library page at http://www.library.carleton.ca/research/course-guides/stgy-5900.

Students are also expected to read recent business articles concerning the selected firm, its competitors and the industries within which it operates, as well as articles on the macro business environment (i.e. markets, technology, economic trends). All assignments, the presentation and final report MUST include supporting metrics and data.

Two groups within the same class may research the same company. However, groups researching the same firm will not be allowed to witness the other group’s presentation.

**Company/Firm Selection Policy:**
It is the responsibility of the student group to select the business firm that will be the basis of the assignments and comprehensive strategic analysis. It is the students’ responsibility to undertake the research necessary to determine if sufficient information is available. The selection of a business firm is an assurance by the students to the professor, that there is sufficient information available to complete the assignments and strategic analysis. Authorization by the professor is to ensure that groups do not choose a clearly ineligible firm. Should it subsequently become apparent that there is insufficient information to adequately complete the assignments, it is the students’ responsibility to change firms and obtain authorization of the new firm. The students may change the selection of the business firm at any time but must receive the necessary approval. The purpose of submitting the drafts is to obtain feedback on avenues for improvements to incorporate into the presentation and final report. Further details will be discussed in class.

Authorization by the professor is not a guarantee that there is sufficient information. Each student is responsible for selecting his/her partners and the business firm to be analyzed, having ensured the adequacy of information available to complete the required comprehensive strategic analysis.

Each group is required to hand in a list of group members, the name of the company chosen, and a list of potential data sources for the research project by **September 28th for those in the Wednesday class and September 29th in the Thursday class.** Groups must at least ensure that they can attain financial information (e.g., financial statements) for the focal firm of interest by this date. A form to be filled out will be available on cuLearn.

**Capstone Project:**
Depending on the complexity of the firm chosen, the number of markets within it operates and the characteristics of its industry, the length of the final Capstone report (page number) may vary. Figures should be included within the body of the report and all notes/citations should be provided in footnotes. Including information that does not add significant value will be penalized (e.g., data dumping or vague statements that are not based on evidence). Hence, careful editing and pertinent, succinct analyses are strongly
advised. Detailed information on the content and format of the report and presentation will be posted to cuLearn and will be discussed in class. It is strongly recommended that groups designate an editor for their Capstone report to validate the coherence of the document, ensure that all required elements have been included and that all citations are accurate and correctly included in the bibliography.

**Scheduling of Capstone Presentations:**
The order of presentation on November 23rd/24th and November 30th/December 1st will be decided during the week 7 class, **November 2nd for those in the Wednesday class and November 3rd for those in the Thursday class.** Further details will be discussed in class.

**Assignments, critique, cases, etc:**
Detailed information will be posted to cuLearn in advance of due dates and will be discussed in class. While group discussion is encouraged for many aspects of this course, the take-home case exam is an individual deliverable which should **not** be the fruit of any group discussion.

### Course Schedule*:

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic/Agenda</th>
<th>Pre-class Prep plus required readings that follow - TBC</th>
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<tbody>
<tr>
<td>1</td>
<td>Sept. 7/8 What is strategy?</td>
<td>Chapters 1</td>
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<td></td>
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<td><strong>Case: McDonald’s Corporation</strong></td>
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<td>McGraw Hill Publishing</td>
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<td>MH0037 (Harvard Business Publishing website)</td>
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<td>2</td>
<td>Sept. 14/15 Library Tools Research Session, led by: Trish O’Flaherty</td>
<td>Course to be held in TBA</td>
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<td>Insights into 10K reports; external environment, industry introduction</td>
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<td>3</td>
<td>Sept. 21/22 External environment: Industry analysis; Porter’s 5 Forces</td>
<td>Chapters 2</td>
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<td><strong>Case: TBA</strong></td>
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<td>4</td>
<td>Sept. 28/29 Internal environment: Resource based view</td>
<td>Chapters 3</td>
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<tr>
<td></td>
<td><strong>Case: TBA</strong></td>
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<td><strong>Submit: Critique.</strong> See cuLearn for instructions.</td>
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<td><strong>Submit: Group member information, company choice, and list of potential data sources (form on cuLearn)</strong></td>
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<tr>
<td>Date</td>
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<td>Pre-class Prep plus required readings that follow - TBC</td>
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<tr>
<td>Oct. 5/6</td>
<td>Business level strategies: Cost leadership &amp; differentiation</td>
<td>Chapters 4</td>
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<td><em>Case: TBA</em></td>
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<td><em>Case: TBA</em></td>
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<td><em>Submit Draft Capstone External Environment Analysis of Firm</em></td>
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<td>Oct. 19/20</td>
<td>NO CLASSES – exam &amp; break weeks</td>
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<td>Oct. 26/27</td>
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<td>7</td>
<td>Nov. 2/3                        Corporate level strategies: Diversification &amp; integration</td>
<td>Chapters 6</td>
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<td><em>Case: TBA</em></td>
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<td><em>Submit Draft of Internal Analysis of Firm &amp; Corporate and Business Strategy identification, problems and alternatives/recommendations</em></td>
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<tr>
<td>8</td>
<td>Nov. 9/10                       Corporate level strategies: M&amp; A, alliances &amp; cooperation</td>
<td>Chapter 7 and 9</td>
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<td><em>Case: TBA</em></td>
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<td><em>Submit Take-home Individual Exam Case.</em> See cuLearn for details*</td>
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<tr>
<td>9</td>
<td>Nov. 16/17                      Geographical diversification strategy</td>
<td>Chapter 8</td>
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<td><em>Case: TBA</em></td>
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<tr>
<td>10</td>
<td>Nov. 23/24                      Capstone presentations</td>
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<tr>
<td>11</td>
<td>Nov. 30/Dec. 1                   Capstone presentations</td>
<td><em>Submit Final Capstone Report (Groups presented Nov. 23 for Wed. class or Nov. 24 for Thurs. class)</em></td>
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<tr>
<td>12</td>
<td>Dec. 7/8                        Governance</td>
<td>Chapter 10</td>
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<td><em>Case: TBA</em></td>
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<td></td>
<td><em>Submit Final Capstone Report (Groups presented Nov. 30 for Wednesday class or Dec. 1 for Thursday class)</em></td>
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*While every attempt will be made to keep to the schedule listed above, modifications may
become necessary.

**4 presentation slots per class are available. Depending on enrolment in class, there may be a need to schedule presentations in the final class. For those that present in the last class, the final report will be due a week after the presentation date.

**Further Additional Readings - TBC**:

<table>
<thead>
<tr>
<th>Date</th>
<th>Library Articles – Required Readings</th>
<th>Optional readings: Bain &amp; Co¹, Booz &amp; co./pwc², or McKinsey³</th>
</tr>
</thead>
</table>
*Perils of Bad Strategy*, Rumelt, June2011³ |
| 2 Sept. 14/15 | 10K example - Starbucks Latest 2014 – 10K (first 50 pages) at Nov. 14, 2014 [http://investor.starbucks.com/phoenix.zhtml?c=99518&p=irol-sec&secCat01.1_rs=41&secCat01.1_rc=10&control_selectgroup=0&x=55,59&y=11,21](http://investor.starbucks.com/phoenix.zhtml?c=99518&p=irol-sec&secCat01.1_rs=41&secCat01.1_rc=10&control_selectgroup=0&x=55,59&y=11,21) | |
*Remapping your strategic mind-set*, Ghemawat, Aug2011³ |
| 4 Sept. 28/29 | | *Beyond Functions*, Leinwand & Mainardi, Spring 2013²  
*Building a Flywheel Business*, Laseter & Bennett, summer 2013²  
*Is Your Company Fit for Growth?* Caglar, Pandrangi & Plansky,Summer 2012² |
<table>
<thead>
<tr>
<th>Date</th>
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<th>Optional readings: Bain &amp; Co¹, Booz &amp; co.², or McKinsey³</th>
</tr>
</thead>
</table>
| 5 Oct. 5/6 | HBR 90 (2) p. 132-137
*When One Business Model Isn’t Enough (LAN Airlines)*
2012, Casadesus, Masonell & Tarzijan | *Sustained Cost Transformation*, Guarraia, Saenz & Fallas, Jan 2012⁴
*How old industries become young again*, Sviokla, Autumn 2014²
*Growing when your industry doesn’t*, Rangan & Hirsh, Summer 2014²
*Hyundai’s Capabilities Play*, Holstein, spring 2013²
*Think Functionally, Act Strategically*, Caglar, Kapoor & Repsam, Spring 2013² |
| 6 Oct. 12/13 | TBA | *3M’s Open Innovation*, Jaruzelski, Holman & Baker, May 2011²
*Battle-test your Innovation Strategy*, Capozzi, Horn & Kellen, Dec. 2012³
*Using rivalry to spur innovation*, Ferrari & Goethals, May 2010³ |
*We’re from Corporate and We’re Here to Help*, Favaro, April 2013² |
| 8 Nov. 9/10 | | *Deals that transform companies*, Nahass, Summer 2014²
*The Capabilities Premium in M&A*, Adolph Mainardi, Spring 2012²
*How to Put Your Money Where Your Strategy is*, Hall, Lovallo & Musters, March 2012³ |
| 9 Nov. 16/17 | | *Overcoming the Global Innovation Trade-Off*, Doz & Wilson, Winter 2012²
*How to Be a Truly Global Company*, Prahalad & Bhattacharyya, Fall 2011²
*Competing for the Global Middle Class*, Tse, Russo & Haddock, Fall 2011²
*Why implementation matters*, Pustkowski, Scott & Tesvic, Aug. 2014³
*Understanding your ‘globalization penalty’*, Dewhurst, Harris & Heywood, July 2011³ |
<table>
<thead>
<tr>
<th>Date</th>
<th>Library Articles – Required Readings</th>
<th>Optional Readings: Bain &amp; Co¹, booz &amp; co.², or McKinsey³</th>
</tr>
</thead>
</table>
| 12 Dec. 7/8 |                                      | *The Trust Agenda*, Nally, Summer 2014²  
Three secrets of organizational effectiveness, Newton & Davis, Autumn 2014²  
*Creating partnerships for sustainability*, Albani, July 2014³  
*High performing boards: What’s on their agenda?* Bhagat & Kehoe, April 2014³  
*Improving Board Governance*, Bhagat, Hirt & Kehoe, 2013³ |

Additional or modifications to, readings may be identified throughout the semester.

**IMPORTANT ADDITIONAL INFORMATION**

**Course Sharing Websites:**
Student or professor 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).

**Policy on Mobile Devices:**
The use of mobile devices IS NOT PERMITTED in this class. It is disruptive to the instructor and class members. If you carry such a device to class, please make sure it is turned off. If an emergency situation requires you to keep it turned on, please discuss this with your instructor prior to class.

**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, followership and other group skills. Group assignments are also good for learning integrative skills for putting together a complex task. Your instructor 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.

**Person with Disabilities:**
Students with disabilities requiring academic accommodations in this course are encouraged to contact a co-ordinator at the Paul Menton Centre for Students with Disabilities to complete the necessary letters of accommodation. After registering with
the PMC, make an appointment to meet and discuss your needs with me at least two weeks prior to the first in-class test or ITV midterm exam. This is necessary in order to ensure sufficient time to make the necessary arrangements. Please refer to http://www.carleton.ca/pmc/ for all PMC information.

**Religious Observance:**
Students requesting academic accommodation on the basis of religious observance 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 academic 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.

**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://carleton.ca/studentaffairs/academic-integrity/.

**Important dates and deadlines:**
Sept. 5 University closed, Statutory holiday.
Sept. 6 F1 (six weeks) and F1&F2 (12 weeks) classes begin.
Sept. 30 Last day to withdraw from fall term courses with a full fee adjustment.
(financial withdrawal).
Oct. 10 University closed, Statutory holiday.
Oct. 14 F1 classes end. Deadline for academic withdrawal is the last day of classes (each term).
Oct. 17-21 F1 Exam and final project week. No regularly scheduled MBA classes with the exception of non-MBA courses, e.g. INAF/PADM/DATA classes.
Oct. 24-28 Fall break, no classes.
Oct. 31 F2 (six weeks) classes begin.
Nov. 25 Winter Payment Deadline. Visit the Fee Payment page for important payment information. Late charges may be applied to the student account any time after this date.
Dec. 9 F2 classes end. Deadline for academic withdrawal is the last day of classes (each term).
Dec. 12-16 F2 Exam and final project week. No regularly scheduled MBA classes with the exception of non-MBA courses, e.g. INAF/PADM/DATA classes.

**Additional Guidance on Citations/Bibliography:**

**Footnotes:**
Every source for citations, statistics, tables, etc. should be sequentially referenced to a footnote at the bottom of the page. Full information should be provided to allow a reader to know exactly where you obtained the data, remembering that direct quotations require the specifics of page number. When a subsequent citation is made to the exact same one that proceeds you may identify it as *ibid* (for more details see http://www.chicagomanualofstyle.org.proxy.library.carleton.ca/16/ch13/ch13_sec064.html).

**Bibliography:**
It is important that you follow a recognized style to present a comprehensive bibliography that ensures an integrated alphabetical order and recognizes multiple citations to same year documents from a common source.

Be consistent when ordering your citation sources so that like items are grouped together. For example, Natural Resources Canada may also be referred to as NRC (both of which are acceptable), however in ordering citations from multiple NRC documents select one format and list consecutively by date (from oldest to most recent).

Guidance provided by the Academy of Management in its Style Guide may be found at: http://aom.org/uploadedFiles/Publications/AMR/AMRstyleguide.pdf (disregard the in-text, in-parenthesis identification, as the required use of footnotes replaces this format).
Example of Declaration of Academic Integrity

STGY 5900 – Fall 2016: Declaration of Academic Integrity (Group)

___Draft/ ____Final Capstone Report on Company: ______________________

The University Senate defines plagiarism in the regulations on instructional offenses as: “to use and pass off as one’s own idea or product work of another without expressly giving credit to another.”

I/we declare that the work submitted herewith is my/our work. All sources have been referenced in the footnotes and listed in the bibliography. This work has not been shared with anyone outside this group. This work is the intellectual property of each of the group members and will be returned to any one of the group members to be shared with the other group members.

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<th>Student Number</th>
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<th>Signature of Student (Everyone must sign to receive a grade)</th>
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Date Submitted: ____________________________________________

Instructional offence cases must be communicated to the Associate Dean, MBA programs, who then refers the allegation to the Associate Dean, Faculty of Graduate and Postdoctoral Affairs; individual solutions are not permitted.