



ACCT 5133: Advanced Integration 1
May 7 to June 18

Sec A: Wed 14:35 – 17:25; Thurs 11:35 – 14:25; Canal Building Rm 2202

Sec B: Wed 11:35 – 14:25; Thurs 8:35 – 11:25; Canal Building Rm 2400

Sec P: Tue & Thurs 18:05 – 20:55; Canal Building Rm 3400

Instructor for Sections A & B: Leanne Keddie, MBA, CPA, CMA
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Office Hours: By appointment

Instructor for Section P: Mike Lionais, CPA, CMA
Office: TBD
Email: Mikelionais@gmail.com
Office Hours: By appointment

Course Description: Discussion, analysis and integration with an emphasis on the application of strategic management to various accounting and finance issues.

This course involves a combination of interactive class sessions, reflections by students, lectures and coaching. Students will receive instruction on the problem-solving process and discover what is required to resolving a strategic/accounting case. Students will then have opportunities between in-class sessions to work on a comprehensive case and will receive group-based coaching and feedback on their performance. Groups will also have the ability to discuss their learnings with their peers in a roundtable format.

This is a course designed around doing the work of solving a case. We begin by learning about the CPA Way and quickly learn to apply these steps to a board case. By the end of the session, students will be capable of resolving samples cases under exacting CPA conditions.

To address the specific core competencies students will be expected to work in groups as well as reflect individually on their learnings. Students may find it useful to spend some time prior to class discussing the issues that are involved in the cases.

All students will be expected to analyse the case and participate in the discussion of the case.

Learning Objectives

Strategic thinking skills:

Strategic thinking skills allow us to draw unique insights that enable organizations to overcome key challenges they face and seize opportunities to create value.

These skills allow business professionals to address key questions facing every organization such as: “What are our goals and aspirations? Where will we do business (e.g., customers, products, geographies)? How do we create value and capitalize on our chosen markets? What choices do we need to make, and what are the trade-offs? What should we do next?”

The development of a systematic way of thinking that allows you to establish recommendations to questions such as these that are based on facts is a key objective of this course.

Structured problem-solving skills:

Structuring your analyses and developing a logical argument enables business professionals to balance rigor and efficiency in solving complex business scenarios. Frameworks decompose problems into a set of drivers or elements, efficiently guide the identification of key issues and potential recommendations, and aid in prioritizing actions.

In this course, students will learn to approach problem solving and presentation building in a structured manner by using existing frameworks and learning how to develop your own.

Structured financial evaluation skills:

This course emphasizes the fundamental techniques of financial statement analysis. Building upon core accounting and investment concepts, the course covers the analysis (including ratio analysis) and interpretation of financial accounting information including the balance sheet, income statement, and statement of cash flows. The course also examines the use of accounting information in investment decisions as applied to resolving a case problem.

Course Prerequisites: Completion of a minimum of 2.0 credits in the Master of Accounting program with a minimum average grade of B-.

Textbook(s): None. Class notes and session notes provided on CuLearn

Exam date: No Exams. The assessment points are components to completing the case.

Drop Course Policy: The deadline for academic withdrawal is the last day of classes (each term).

Course Requirements and Methods of Evaluation:

Team Agreement	5%
Work Plan & Schedule	5%
Reflections* (Individual and peer evaluations)	10%
Written Report	60%
○ Based on board report case	
○ 6,000 words, 20 pages appendices	
○ Marked by professor	
Oral Presentation	<u>20%</u>
○ 20 minutes, 10 minutes Q&A	
○ Marked by professor and panel (if available)	
	100%

The items in bold represent the submissions related to the CPA Canada Capstone 1 Report. Items denoted with a '*' are individual deliverables. All other items are group deliverables.

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

Development of Enabling Competencies

One of the objectives of the MAcc is the development of the following enabling competencies and this course will develop these competencies as follows:

Competencies	
1. Professional and Ethical Behaviour	Professional and Ethical Behaviour and Problem Solving and Decision Making will be developed on a weekly basis through the discussion and analysis of the case.
2. Problem Solving and Decision Making	
3. Communication (written and oral)	Communication will be assessed through your in-class participation, written submissions and report presentation.

4. Self-Management	Self-Management will be assessed by in-class participation and will reflect on your ability to keep up with the course materials on an on-going basis.
5. Teamwork and Leadership	Teamwork and leadership will be assessed through the group project.

Final report date: The complete capstone report must be submitted as per the schedule below in professional report format.

Preparation and participation: Students are expected to come fully prepared to discuss and engage in the course topic. The success of this course for both students and professor depends on active thoughtful participation by the members of the class during lectures and case discussions.

Attendance is an integral part of class participation. The mark each student receives will reflect the quantity and quality of that student's contribution to the course. Note that attendance is a minimum prerequisite for participation. The final mark will be at the discretion of the professor based on satisfactory group feedback and participation overall.

Each student must submit regular individual reflections and ongoing peer/group assessments as per the schedule below.

Missed assignments and deferred examination: Students unable to write or complete the assessment items because of illness or other circumstances beyond their control must contact the instructor and the MAcc 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.

Deferred exams are not granted for students who have made travel arrangements that conflict with examination schedule.

Course Schedule:

Class	Topic	Deliverables
May 8 th – plenary/ group work	Plenary – Orientation, Team Agreement, Work Plan & Schedule <ul style="list-style-type: none"> • Class expectations including importance of team work • Overview of next six weeks and the structure and components of a board report Group work – Team Agreement, Work Plan & Schedule	

<p>May 9th – plenary/ coaching</p> <p>May 9th – plenary/ coaching cont.</p>	<p>Plenary – Assess the Situation & Problem Statement</p> <ul style="list-style-type: none"> • Review situational analysis <ul style="list-style-type: none"> ○ Qualitative ○ Quantitative • Review big picture of Assess the Situation • Review determining the problem(s) <p>Coaching – Getting Started (10 minutes/group)</p> <ul style="list-style-type: none"> • Review Team Agreement • Review Work Plan & Schedule 	<ul style="list-style-type: none"> • Team Agreement • Work Plan & Schedule
<p>May 15th – coaching</p>	<p>Coaching – Review Assess the Situation components and Problem Statement</p>	<ul style="list-style-type: none"> • Assess the Situation Components • Problem Statement • <i>Updated Work Plan & Schedule (if necessary)</i>
<p>May 16th – roundtable/ plenary</p>	<p>Roundtable – Assess the Situation and Problem Statement</p> <ul style="list-style-type: none"> • Groups paired to discuss challenges, perspectives, learnings and issues for Assess the Situation and Problem Statement (30 minutes) <p>Plenary – Analyze the Major Issue(s)</p> <ul style="list-style-type: none"> • Review analysis components for Analyze the Major Issue(s) <ul style="list-style-type: none"> ○ Qualitative ○ Quantitative 	<ul style="list-style-type: none"> • Individual reflections due • Interim peer evaluation • <i>Updated Work Plan & Schedule (if necessary)</i>
<p>May 22nd – coaching</p>	<p>Coaching – Review Analyze the Major Issue(s)</p>	<ul style="list-style-type: none"> • Analyze the Major Issue(s) components • Revised Assess the Situation and Problem Statement components • <i>Updated Work Plan & Schedule (if necessary)</i>
<p>May 23rd – roundtable/ plenary</p>	<p>Roundtable – Analyze the Major</p> <ul style="list-style-type: none"> • Groups paired to discuss challenges, perspectives, learnings and issues for Analyze the Major Issue(s) (30 minutes) <p>Plenary – Conclude and Advise</p> <ul style="list-style-type: none"> • Review analysis components for Conclude and Advise 	<ul style="list-style-type: none"> • Individual reflections due • Interim peer evaluation • <i>Updated Work Plan & Schedule (if necessary)</i>

May 29 th – coaching	Coaching – Conclude and Advise	<ul style="list-style-type: none"> • Conclude and Advise components • Revised Analyze the Major Issue(s) components • <i>Updated Work Plan & Schedule (if necessary)</i>
May 30 th – roundtable/ plenary	Roundtable – Conclude and Advise <ul style="list-style-type: none"> • Groups paired to discuss challenges, perspectives, learnings and issues for Conclude and Advise (30 minutes) Plenary – Report Writing <ul style="list-style-type: none"> • Review how to put together a formal business report 	<ul style="list-style-type: none"> • Individual reflections due • Interim peer evaluation • <i>Updated Work Plan & Schedule (if necessary)</i>
June 5 th – coaching	Coaching – Report Writing	<ul style="list-style-type: none"> • Draft Full Report • Coaching on report writing • Revised Conclude and Advise components • <i>Updated Work Plan & Schedule (if necessary)</i>
June 6 th – roundtable/ plenary	Roundtable – Report Writing <ul style="list-style-type: none"> • Groups paired to discuss challenges, perspectives, learnings and issues for report writing (30 minutes) Presentation Components <ul style="list-style-type: none"> • Components of presentation • Time management • Sell idea, not repeat of written report Establishing Trust <ul style="list-style-type: none"> • Prove you understand company • Prove you understand problem • Prove you understand industry Securing Buy-in <ul style="list-style-type: none"> • Prove your solution will work • Prove the company can implement it 	<ul style="list-style-type: none"> • Individual reflections due • Interim peer evaluation • <i>Updated Work Plan & Schedule (if necessary)</i>
June 12 th – coaching	Coaching – presentation content	<ul style="list-style-type: none"> • Full report due • Draft presentation due • Coaching on presentation
June 13 th – coaching	Dress rehearsal with professor	<ul style="list-style-type: none"> • Individual reflections due • Final peer evaluation • Coaching on presentation

June 24 th or June 25 th – presentations	Groups will be assigned one of these two dates for their presentation to professor and guest panel (based on availability) <ul style="list-style-type: none"> • 20-minute presentation • 10-minute Q&A 	<ul style="list-style-type: none"> • Presentation
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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.

Policy on Mobile Devices

Please be considerate of others in the class. Cell phones have the potential to be 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 Spratt 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.

Person 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). Requests made within two weeks will be reviewed on a case-by-case basis. After requesting accommodation from PMC, meet with me to ensure accommodation arrangements are made. Please consult the PMC website (www.carleton.ca/pmc) for the deadline to request accommodations for the formally-scheduled exam (if applicable).

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 is 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 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/>.

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/>

Important dates and deadlines

<https://carleton.ca/summer/dates-and-deadlines/>