



**Carleton**  
University

**Sprett**  
School of Business

CARLETON UNIVERSITY  
BUSI 3103  
WINTER 2024

## INTRODUCTION TO ORGANIZATIONAL THEORY

**Instructor:** Dr. W. G. Zhao  
**Office Hours:** By Appointment Only  
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**TA:** TBC  
**Office Hours:** TBC  
**Email:** TBC

**Modality:** R (Online) Thursday 6PM

**Pre-requisites & precluded Courses:**  
Second-year standing, and one of BUSI 2101, BUSI 2121, BUSI 2702, PSYC 2801. *The School of Business enforces all prerequisites.*

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**Course Calendar description from the [2023/2024 University calendar](#):**

Macro organization theory. Structuring of organizations in a complex global economy. Effects of the external environment, technology, culture and organizational goals on the structure, processes and effectiveness of the organization.

**Course Description:**

Introduction to Organization Theory is a foundational course that explores the principles, concepts, and key theoretical frameworks that underpin the understanding of organizations and their functioning in various contexts. The course aims to provide students with a



comprehensive understanding of how organizations are structured, managed, and influenced and how they interact with their environments. By examining contemporary theories, students will gain insights into the complex dynamics of organizations and their impact on individuals, groups, and society as a whole.

**Learning Outcomes:**

1. To learn to describe and differentiate the key theories and concepts of organization theory.
2. To learn to analyze and evaluate organizational structures and behaviours.
3. To learn to apply organization theory to real-world scenarios.
4. To learn and practice the considerations in organizational decision-making.


**Reading(s)/Textbook(s)/Required Materials (incl. technical requirements, i.e., webcam):**

1. **Webcam:** All students must have access to a webcam for participating in Zoom sessions.
2. **Reading:** Please see reading list below. All readings, except that for Theme 1, are compulsory. These articles are accessible from the University's Databases (E-Journal Collections) and/or Google Scholar, unless otherwise specified.

Theme 1 – Introduction to Organization Theory

1. Greenwood, R., Oliver, C., Lawrence, T. B., & Meyer, R. E. (2017). Introduction. In *The SAGE Handbook of Organizational Institutionalism* (2nd ed.). SAGE Publications.

Theme 2 - Neo-Institutional Theory: Origin

2. DiMaggio, Paul J. and Walter W. Powell. (1983). The iron cage revisited: Institutional isomorphism and collective rationality in organizational fields. *American Sociological Review* 48,147-60.  (available online)

Theme 3 – Institutional Logics

3. Michael, L. (2007). A tale of two cities: Competing logics and practice variation in the professionalizing of mutual funds. *The Academy of Management Journal*, (2), 289.

Theme 4 – Institutional Logics 2

4. McPherson, C. M., & Sauder, M. (2013). Logics in Action: Managing Institutional Complexity in a Drug Court. *Administrative Science Quarterly*, 58(2), 165–196

Theme 5 – Institutional Entrepreneurship

5. Munir, K.A., & Phillips, G. (2005). The birth of the 'Kodak Moment': Institutional entrepreneurship and the adoption of new technologies. *Organization Studies*, 26(11),1665–1687

Theme 6 – Practices Theory

6. Whittington, R., Yakis-Douglas, B. and Ahn, K. (2016), Cheap talk? Strategy presentations as a form of chief executive officer impression management. *Strategic Management Journal*. 37. 2413-2424.

#### Theme 7 – Institutional Work

7. Lawrence, T. B., & Dover, G. (2015). Place and Institutional Work: Creating Housing for the Hard-to-house. *Administrative Science Quarterly*, 60(3), 371-410.

#### Theme 8 – Institutional Work 2

8. Wright, A. L., Meyer, A. D., Reay, T., & Staggs, J. (2021). Maintaining Places of Social Inclusion: Ebola and the Emergency Department. *Administrative Science Quarterly*, 66(1), 42–85.

#### Theme 9 – Communities

9. Almandoz J., Marquis C., Cheely M. (2017). Drivers of community strength: An institutional logics perspective on geographical and affiliation-based communities. In Greenwood R., Oliver C., Lawrence T. B., Meyer R. E. (Eds.), *The Sage handbook of organizational institutionalism* (2nd ed., pp. 190–213). SAGE Publications. [G](#)(available online)

#### Theme 10 – Legitimacy

10. Suddaby, R., Bitektine, A., & Haack, P. (2016). Legitimacy. *Academy of Management Annals*, 451-478

Those hyper-motivated are also encouraged to go beyond the assigned readings to better develop their understanding of a topic.

Some popular business journals (in alphabetical order)

- Academy of Management Perspectives*
- California Management Review*
- Harvard Business Review*
- MIT Sloan Management Review*
- Stanford Social Innovation Review*

Some key academic journals (in alphabetical order)

- Academy of Management Journal*
- Academy of Management Learning and Education*
- Academy of Management Review*
- Administrative Science Quarterly*
- Human Relations*
- Journal of Management Inquiry*
- Journal of Management Studies*
- Journal of Business Ethics*
- Organization*
- Organization Science*
- Organization Studies*
- Research in the Sociology of Organizations*



**Course Requirements & Methods of Evaluation (including due dates):**

<b>Assignment</b>	<b>Value</b>	<b>Individual/Team</b>	<b>Due Dates</b>
Pre-Seminar Assignments	12%	Group	11:59PM the following Wednesday
Brainstorming Artifacts	9%	Group	09:00PM each Thursday
Theme Presentations	12%	Group	N/A
Midterm Project	17%	Group	Between 6PM-9PM February 29
General Discussion Contribution	20%	Individual	N/A
Final Write-up	30%	Individual	11:59PM April 10
<b>TOTAL</b>	<b>100%</b>		

**Assignments and Projects:****Pre-Seminar Submissions: 12% = 4% x 3**

This course is structured around 10 themes, and there are weekly group assignments for the 9 post-Introduction themes (Themes 2-10). These assignments are designed to 1) familiarize the students with influential contemporary organization theories, and 2) develop their abilities to interpret, develop, and critique these theories.

These group assignments are role-based, including

- Author Role (4 marks per submission): Responsible for developing and submitting Paper Presentation Slides.
- Reviewer Role (4 marks per submission): In charge of writing and submitting reviews of the assigned papers.
- Knowledge Translator Role (4 marks per submission): Tasked with creating and submitting Case Study Slides.

During the course of the term, each of the groups participating in the course will rotate through these three distinct roles - Author Group, Reviewer Group, and Knowledge Translator Group - ensuring that each group experiences each role once. This rotation allows students to engage with the course material from different perspectives, enhancing their understanding and skills in various aspects of organization theory and practice.

All assignments are to be submitted to Brightspace folder “Pre-Seminar Submissions”.

*Format*

While Author Group are free to create slides in the way they see fit, for the Knowledge Translator Group and Reviewer Group, specific format requirements are set to guide their presentations and critiques:

- Knowledge Translator Group: Their task is to develop a case study presentation with a maximum of 4 slides. These slides should be divided as follows:
  - Background Information: Up to 2 slides to provide context and essential background details about the case study.

- Discussion: 1 to 2 slides dedicated to points of discussion, where the case study is directly linked to the theories or concepts from the week's readings.
- Reviewer Group: This group is tasked with writing a critique of each paper they review, with specific formatting guidelines:
  - Length: Limited to two pages.
  - Font and Spacing: The document should be single-spaced, using Times New Roman font, size 11pt.
  - Margins: Ensure 1-inch margins on all sides of the document.
  - Header: The full names of the group members should be included in the top, right-hand side of the header.
  - References: It's not necessary to include references, as it is understood that the critiques are based on the assigned reading and are not intended for public consumption.

*Specific Areas for Reviewers to Consider (Adapted from Academy of Management)*

The following points are some suggested criteria that might help you structure your review of the papers assigned to you. They are by no means extensive, and your review should not be written in a Q&A manner.

<p>Theory Development</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> What are some of the flaws or neglects in the current theory?</li> <li><input type="checkbox"/> Is there a way to better develop the theoretical framework?</li> <li><input type="checkbox"/> Are the core concepts clearly defined? If not, suggest alternatives.</li> <li><input type="checkbox"/> Is the logic behind the hypotheses or propositions persuasive? If not, why not.</li> <li><input type="checkbox"/> What other references are needed to backup some of the claims in the theory or theorization?</li> </ul> <p>Data and Result (for empirical papers)</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Are the data appropriate for the theory and research question(s)?</li> <li><input type="checkbox"/> Are the analytical techniques appropriate for the theory and research question(s)?</li> <li><input type="checkbox"/> Are there alternative explanations for the results?</li> </ul> <p>Theoretical Contributions</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> What are the value-added contributions that the paper makes to existing research?</li> <li><input type="checkbox"/> Are there any organizational phenomena that fall in the same context as the research yet that may challenge the theory?</li> </ul>
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**Brainstorming Artifacts: 9% = 3% x 3**

Each week, before finalizing their submissions, every group – Author, Knowledge Translator, and Reviewer – will engage in brainstorming focused on their respective tasks for that week's paper.

- Author Group: to submit the cover slide, which should be a result of the brainstorming and represent the central theme or key concepts of their presentation.
- Knowledge Translator Group: To submit the case study topic, could be further refined.

- Reviewer Group: To submit a one-paragraph starter critique as a starting point for their further review.

All submissions should be made to Brightspace folder “Brainstorming Artifacts”.

### **Midterm Project: 17%**

This group project requires student groups to effectively translate the core concepts of a selected theme into a practical, real-world scenario through a role-play in video format. Each group must select a theme that they have not already presented, reviewed, or studied in a case study.

Possible scenarios may be set in corporate environments, non-profit organizations, public institutions, or other contexts relevant to the theme.

#### *Requirements*

- Length: Videos should be 3-5 minutes in duration.
- Quality: While professional video quality is not required, videos should be clear and have good audio clarity.
- Submission: All submissions should be made to Brightspace folder “Midterm Projects (Open 6PM-9PM on Feb 29)”.
- Roles: All group members must participate in the project, taking on roles in acting, scripting, filming, or editing.

#### *Evaluation Criteria*

- Content Accuracy: The extent to which the video accurately reflects the core essence of the chosen theme.
- Creativity and Originality: The level of creativity and uniqueness in the presentation of the theme.
- Engagement: The ability of the video to engage the audience and effectively communicate its message.
- Teamwork: Demonstrated collaborative effort in the creation of the video.
- Ethics and Respect: Content should remain respectful and appropriate for an academic environment.

### **General Discussion Contribution: 20%**

The contribution of other students (those who are not the Authors, Reviewers, or Knowledge Translators of a theme) will be evaluated according to their attendance and discussion contribution in the class. Attendance in class is a necessary but not sufficient element of contribution (Full attendance= 10%). In addition, students are expected to be active in sharing their views in classroom discussions. Students are expected to attend every class and to participate in discussions that will enhance and/or supplement course materials.

### **Final Write-Up: 30%**

**Only Choose One of the Following. Individual Work. Do NOT Wait Until the Last Week to Start.**

*Alternative 1 - Theory for Academics: Two-pager*

This two-pager is concise writing of a research idea with a focus on the theoretical contributions it could make to organization research.

#### *Content*

These two pages should include a research question, a succinct account of the literature reviewed (maximum one page), data sources (if it were an empirical study; maximum one paragraph), expected findings and potential contributions (why this research is interesting and important). The reference list does NOT count towards the two pages.

#### *Format*

All submissions should be formatted in the following way: Single-spaced, Times New Roman 10pt, 1-inch margins, full names in the top, right hand side header.

*Remember the components and qualities of a good theory: context, constructs, ways in which they interact ... and it should be interesting as well.*

The rubric is as follows:

- Key concepts, relationships, and other important elements of the theory are identified and sufficiently defined, and
- Boundaries, context, assumptions, limitations on its application, and context of the theory are specified correctly.

Please use APA guidelines for references. Students are encouraged to ask a peer to provide technical proofreading of the paper.

#### ***Alternative 2 - Theory for General Public: Four-pager***

This four-page article is designed in the style of a newspaper piece, with the objective of shedding light on contemporary business, organizational, and societal issues and debates. It draws upon insights from the organizational theory. The content is intended to be informative and engaging, connecting organization theory with real-world applications and current events. For optimal impact, this article could be targeted to a mainstream newspaper or an online media platform known for its in-depth analysis and commentary. The student should also identify a section of a newspaper or mainstream media outlet where the article would be most relevant.

#### *Format*

All submissions should be formatted in the following way: No Reference, Single-spaced, Times New Roman 10pt, 1-inch margins, full names in the top, right-hand side header.

#### *Information to include*

Title, Target Newspaper or Media Outlet, Section, Main Content, Reference  
The reference list does NOT count towards the page limit.

All submissions should be made to Brightspace folder “Final Write-Up”.

#### **Course Schedule:**

Please refer to the course Brightspace shell for updates on schedule. In the event that a scheduled class is cancelled, a make-up class will be scheduled and the course schedule adjusted accordingly.



Date	Theme	Topic
Jan 11	Theme 1: Introduction	Introduction to Organization Theory
		Course Logistics, Theme Overview, Grouping (Group Number in Screenshot)
Jan 18	Theme 2: Early Insights	DiMaggio, P. and Powell, W. 1983.
		Neo-Institutional Theory: Origin
Jan 25	Theme 3: Development	Lounsbury, M. 2007.
		Institutional Logics
Feb 1	Theme 4: Development	McPherson, C. M., & Sauder, M. 2013.
		Institutional Logics 2
Feb 8	Theme 5: Development	Munir, K.A., & Phillips, G. 2005
		Institutional Entrepreneurship
Feb 15	Theme 6: New Direction	Whittington, R., Yakis-Douglas, B. and Ahn, K. 2016
		Practices Theory
<b>Feb 29</b>	<b>Evaluation</b>	<b>Midterm</b>
Mar 7	Theme 7: Development	Lawrence, T. B., & Dover, G. 2015
		Institutional Work
Mar 14	Theme 8: Development	Wright, A. L., Meyer, A. D., Reay, T., & Staggs, J. 2021
		Institutional Work 2
Mar 21	Theme 9: Construct	Almandoz J., Marquis C., Cheely M. 2017
		Communities
Mar 28	Theme 10 Construct	Lounsbury, M., & Glynn, M. 2001
		Suddaby, R., et al. 2016 Legitimacy
<b>Apr 4</b>	<b>Review</b>	<b>Q&amp;A and WS for final paper</b>

**Contribution to Learning Goals of the Program (BCom, BIB):**

<b>Program Learning Goal</b>	<b>Competencies Not Covered</b>	<b>Competencies Introduced (only)</b>	<b>Competencies Taught But Not Assessed</b>	<b>Competencies Taught and Assessed</b>
<b>CHECK (X) ONE PER ROW</b>				
<b>BC1 Knowledge</b> <i>Graduates will be skilled in applying foundational business knowledge to appropriate business contexts.</i>				<b>X</b>
<b>BC2 Collaboration</b> <i>Graduates will be collaborative and effective contributors in team environments that respect the experience, expertise and interest of all members.</i>				<b>X</b>
<b>BC3 Critical Thinking</b> <i>Graduates will be discerning critical thinkers, able to discuss different viewpoints, challenge biases and assumptions, and draw conclusions based on analysis and evaluation.</i>				<b>X</b>
<b>BC4 Communication</b> <i>Graduates will be effective and persuasive in their communications.</i>				<b>X</b>
<b>BI5 Global Awareness (BIB ONLY)</b> <i>Graduates will be globally-minded.</i>				<b>X</b>

**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 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.

### **Grading**

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

### **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 Accommodation**

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](https://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](https://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](mailto: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](https://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](https://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](https://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.

Process: If an alleged violation occurs, all relevant documentation will be forwarded to the Dean. If the allegation proves true, the 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. **For a first offence, at a minimum, the penalty assigned will normally be a zero on the submitted work and at least a minimum full grade reduction of the final course grade. For a second offence, at a minimum, the penalty assigned will normally lead to a suspension from studies.**

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 Undergraduate Student Services Office offers program advising and overall student success support. Our team is available to discuss your academic goals and your program progression plans. We can also work with you to develop strategies for success, including study skills for Business. If you experience any difficulty this term or if you would like to access support, please contact our team at [bcom@sprott.carleton.ca](mailto:bcom@sprott.carleton.ca) or at [bib@sprott.carleton.ca](mailto:bib@sprott.carleton.ca).

### **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](http://carleton.ca/csas).

### **Important Information:**

- Students must always retain a 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 <https://carleton.ca/its/get-started/new-students-2/>
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