



Gustavson
School of Business
University of Victoria



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University of Victoria

Course Outlines Fall Term

NOTE: Course outlines are for reference only.
Availability and course offerings are subject to change every year.

Gustavson School of Business (GSB)
University of Victoria

Contact: GSBWelcome@uvic.ca



Please follow the hyperlink on "Course Numbers" to navigate within the document. Please click on the corresponding "Course Title" for more information on prerequisites.

Pre-Requisites: Courses with asterisks (*) have pre-requisites. Please click on the course titles to carefully review pre-requisites.

Core courses: Students are required to take at least 3 core courses due to the cohort-based structure if students were to take Com 315, 321, 341, 351, or 361. Afternoon cohorts are recommended.

Course Numbers	Course Title
Com 100	Understanding World-Class Organization (Credit will be granted for only one of 100, 290, 390)
Com 200	Strategy and Business Fundamentals
Com 202	Financial Accounting I (Duplicate course with Com 315)
Com 220	Organizational Behaviour (Duplicate course with Com 321)
Com 240*	Management Finance
Com 247	Personal Financial Management
Com 250	Fundamentals of Marketing (Duplicate course with Com 351)
Com 302	Legal Environment of Business (Credit can only be granted for one of COM 402, 302)
Com 315*	Financial Accounting (Duplicate course with Com 202)
Com 317*	Management Accounting I (Duplicate course with Com 316)
Com 321*	Leading People and Organizations I
Com 341*	Operations Management
Com 351*	Marketing Principles and Management (Duplicate course with Com 250)
Com 361*	International Business (Duplicate course with IB 301)
Com 400	Strategic Management
Com 402*	Legal Issues: Management (Credit can only be granted for one of COM 402, 302)
Com 410*	Leadership Strategies
Com 426*	Management Accounting II (Credit will be granted for only one of 426, 450 if taken in the same topic)
Com 450	Special Topics : - Managing for Sustainability: Concepts, Tools and Practices for a Circular - Strategies for Emerging Markets - Applied Data Analysis for Business - Start-up Programming
Ent 100	Introduction to Entrepreneurship and Innovation
Ent 402*	Entrepreneurship & Small Business for the Non-Specialist
IB 301	International Environment of Business (Duplicate course with Com 361)

International Business Specialization	Please note that all four of the following courses must be taken together to complete the International Business Specialization: IB 415, IB 416, IB 417, and Com 400 concurrently.
IB 415*	Cross-National management
IB 416*	International Marketing
IB 417*	International Finance
COM 400	Strategic Management



COM100

Understanding World-Class Organizations Fall 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	Monday/Thursday 10am-1120am
Location	Building: David Turpin A120
Instructor:	Mark Colgate
Office hours:	<i>1-2pm Thursdays on zoom. Details below.</i> <i>Join Zoom Meeting</i> https://uvic.zoom.us/j/5923297313
Email:	colgate@uvic.ca

We acknowledge and respect the \acute{e} l \acute{e} k' w \acute{e} ŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Introduction:

Mark Colgate is a professor in service excellence and coaching at the Gustavson School of Business, University of Victoria. In the not-too-distant past Mark spent 3 years as the General Manager of Customer Satisfaction at Commonwealth Bank of Australia, the 10th largest bank in the world. Mark's background is in marketing, customer experience management and coaching and he has taught these topics in New Zealand, Australia, Canada, Ireland and China where he was a regular professor at the China European Business School in Shanghai - the leading business school in China.

His scholarly publications can be found in journals such as *Sloan Management Review*, *Journal of the Academy of Marketing Science*, and the *Journal of Service Research*. He has also

consulted for many companies such as TELUS, WEX, City of Richmond, Vancouver Whitecaps, Whistler Blackcomb, Kiwi Experience Tourism Bus Company, BC Government, and Toyota Financial Services. He also likes tasty cheese and running (to lessen the impact of the cheese).

Texts and Resources:

In the past we have used textbooks, but over time recognized the value in creating a set of readings that provide both frameworks for guiding your thinking and managerially focused processes for understanding business. The link to the readings are posted on Brightspace. However, there is a very good ebook *Introduction to Business, by Gitman, Lawrence J et al. (2018)* is posted online for your use.

Course Objectives and Description:

Designed to ensure students learn all of the components of expertly run organizations. Topics covered include understanding the organizational context, strategy, leadership, accounting and finance, employee motivation, operations, customer and market focus and what effective results look like. Case studies of organizations are used to bring the course to life.

Course Format:

A blend of in-person classes, zoom classes, polling, guest speakers, amusing cats, mini case studies, and break-out group exercises will be employed.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type (Exam, Assignment, Quiz, Other)	Due Date	Weight / %of grade	Description
COM 100: Term Assignment	Individual	AI Assignment	Dec 2 nd	15%	Individual Assignment
COM 100: Term Assignment	Individual	Research Assignment	October 16 th	15%	Individual Assignment
COM 100 Midterm #1	Individual	Test	Nov 2 nd	10%	Midterm 1 -Quiz (multiple guess)
COM 100: Midterm #2	Individual	Test	Nov 20 th	15%	Midterm 2 –Accounting test
COM 100: Polling	Individual	Polling	(Ongoing dates throughout semester)	10%	Participation– participation through zoom polling – 2% <i>when you got 2 or more questions correct out of 4 questions (best 5 from 6)</i>
COM 100: Final exam	Individual	Exam	Mid Dec	35%	Final Examination in December – 3 essay questions
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment’s grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of **2%** for each day an assignment is late.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT is allowed in this course for students who wish to use them. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI. ***Assignment guidelines will provide additional guidance as to how these tools might be part of your process for each assessment this semester and how to provide transparency about their use in your work.***

Attendance and Participation:

Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. Attendance is a critical component of everyone's academic success.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that "A" grades are normally achieved by a minority of students.**

Percentage Range	Grade s	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

"N" (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Note that it is required that you pass **the final exam** to pass the course. In the case that you do not attain a passing grade in any such component, it will result in a final course grade of Incomplete (N), with the maximum possible percentage grade of 49.

Final course grades are official only after they have been approved by the Academic Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- Paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- Accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

TOPIC	Type (In class, online, test etc.	Due Date	Description
COM 100: Welcome!	In class	Thursday 7 th Sept	Introduction: Integrated Business Framework and Entrepreneurship
COM 100: Entrepreneurship	In class	Monday 11 th Sept	Entrepreneurship - Reading: Beating the Odds When You Launch a New Venture
COM 100: Entrepreneurship	Guest Speaker: Zoom Class and zoom quiz 1	Thursday 14 th Sept	Jeff Mallett on entrepreneurship
COM100: External Environment	In class	Monday 18 th Sept	External Environment: The Five Forces Reading: The Five Competitive Forces That Shape Strategy - Michael E. Porter, Harvard Business Review
COM 100: Leadership	In class	Thursday 21 st Sept	Leadership: Level 5 leaders Watch the Founder movie
COM 100: Leadership	Zoom class and zoom quiz 2	Monday 25 th Sept	Leadership: Level 5 leaders Diversity and Inclusion Revolution
COM 100: Leadership	In class	Thursday 28 th Sept	Leadership: Level 5 leaders Reading: What Makes a Leader? Daniel Goleman, Harvard Business Review
COM 100	Truth and Reconciliation Day	Monday ^{2nd} October	No Class
COM 100: Strategy	In class	Thursday 5 th Oct	Strategy: Diagnosis, Choice, Execution Reading: Good Versus Bad Strategy

COM 100	Off: Thanksgiving Bash	Monday 9th Oct	No class
COM 100: Strategy	In class	Thursday 12 th Oct	Guest speaker – Hannes Blum
COM 100: Marketing	Zoom Class and zoom quiz 3	Monday 16 th Oct	Strategy: Diagnosis, Choice, Execution Can You Say What Your Strategy Is? David J. Collis, Michael G. Rukstad, Harvard Business Review
COM 100: Guest Speaker	In class: Guest Speaker	Thursday 19 th Oct	AI, Customer and Market Focus: Creating Value <i>with</i> Customers Reading: Marketing Malpractice
COM 100: Marketing	Zoom Class and zoom quiz 4	Monday 23 rd Oct	AI, Customer and Market Focus: Creating Value <i>with</i> Customers Reading: Ultimate Marketing Machine
COM 100: Marketing	In class	Thursday 26 th Oct	AI, Customer and Market Focus: Creating Value <i>with</i> Customers Case: Kiwi Experience
COM 100: Accounting	In class	Monday 30 th Oct	Measurement, Analysis and Knowledge Management: Accounting Resources: All materials on Brightspace
COM 100: Read for class	Mid-term 1	Thursday 2 nd Nov	Online test
COM 100: Read for class	Zoom Class and zoom quiz 4	Monday 6 th Nov	Measurement, Analysis and Knowledge Management: Accounting Resources: All materials on Brightspace
COM 100: Accounting	In class	Thursday 9 th Nov	Measurement, Analysis and Knowledge Management: Accounting Resources: All materials on Brightspace
COM 100: Read for class	Reading Break	Monday 13 th Nov	No Class
COM 100: Read for class	In class	Thursday and 16 th and Friday 17 th Nov	Optional accounting tutorials
COM 100: Read for class	Online test	Monday 20 th Nov	Midterm 2- accounting test
COM 100: Read for class	In class	Thursday 23 rd Nov	Human Resource Focus: Motivating Your People Reading: Daniel Pink Video – MAP

COM 100: Read for class	ZoomClass and Zoom quiz 6	Monday 27 th Nov	Human Resource Focus: Motivating Your People Reading: Google Best Teams
COM 100: Read for class	In Class	Thursday 30 th Nov	Process Management: Increasing Productivity and Quality
COM 100: Read for class	In Class	Monday 4 th Dec	Process Management: Increasing Productivity and Quality Final exam prep

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



COM 200 (A01, A02, A03, A04, A05, A06)

Strategy and Business Fundamentals

Fall 2023 Course Outline

Note: please check Brightspace frequently for new updates and course changes.

Course hours	Tuesday, Wednesday, and Friday <ul style="list-style-type: none"> ✚ Section A01: 8:30-9:20 ✚ Section A02: 9:30-10:20 ✚ Section A03: 10:30-11:20 ✚ Section A04: 12:30-1:20 ✚ Section A05: 1:30-2:20 ✚ Section A06: 2:30-3:20 		
Location	<ul style="list-style-type: none"> ✚ Section A01: ELL 061 ✚ Section A02: ELL 162 ✚ Section A03: ELL 060 ✚ Section A04: COR B111 ✚ Section A05: COR B111 ✚ Section A06: COR B111 		
Instructor:	Brian Leacock	Tricia Thomas	Wade Danis
Office:	BEC 272		BEC 230
Office hours:	<i>T: 15:30-16:30 or by appointment</i>	<i>T: 15:30-16:30 or by appointment</i>	<i>T: 15:30-16:30 or by appointment</i>
Telephone:	(250) 721-6434	(250) 709-2929	(250) 853-3872
Email:	bleacock@uvic.ca	triciathomas@uvic.ca	wdanis@uvic.ca

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community. Please let us know if we can do better to support your rights in our classroom. We will also do our best to listen and respond compassionately if you want to share with us how we can be a better ally.

Introduction:

This course is a team-taught course delivered by three instructors: Brian Leacock, Tricia Thomas, and Wade Danis. Your instructors' professional profiles may be found on the Gustavson School of Business website: <https://www.uvic.ca/gustavson/faculty/faculty/faculty/index.php>

Texts and Resources:

In an effort to minimize course material costs there is no textbook for this course. Where possible we have placed these directly to Brightspace but you will also be required to source some readings on your own through the library (<http://www.uvic.ca/library/>).

Course Objectives and Description:

Organizations are complex social systems, embedded in local and global contexts that shape and influence the strategy of the firm and the people performing different tasks in pursuit of broader organizational goals. This course introduces students to key concepts involved in the design and management of organizations and the behaviour of individuals and groups within them. The main objectives of this course are to:

- Understand oneself and how to maximize one's strengths to navigate a career
- Develop a greater understanding of your leadership style and further build your leadership potential
- Analyze the issues and dynamics underlying individual and team behaviour in organizations
- Understanding the Indigenous context and business reconciliation in Canada
- Examine the ideas, issues, complexities and ambiguities relevant to the design, development and management of organizations
- Identify the key organizational variables, the relationships among them, and their influence on structure, strategy and effectiveness
- Explore the functioning of various processes and systems inherent in organizations

After completing the course students should be in a position to clearly understand, analyze and critique the environment, goals, strategy and structure of organizations, and the processes within them. The pedagogy will involve lectures, discussions, cases, exercises, presentations, and videos.

Course Format:

We aim to create a seamless delivery but please note that each instructor will have a slightly different style and the course is delivered in three distinct segments. Professor Leacock will focus on Self; Professor Thomas will focus the Business Context, and Professor Danis will focus on Organizational Strategy.

Regardless of the instructor, you are expected to read the material before class and come prepared to engage in a discussion of the material.

Educational Technology

We use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University.

Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which store or access your personal information outside Canada, are required for this course: Zoom, MS Teams, Youtube, HBR, Mentimeter, ChatGPT. We will make you aware if this list changes. We use these technologies to enhance your educational experience at UVic. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at [Zoom](#), [MS Teams](#), [Youtube](#), [HBR](#), [Mentimeter](#). and [ChatGPT](#). We encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to us within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title	Individual or Team	Type	Due Date	Weight/ % of grade	Description
Leacock: Reflected Best Self Journal	Individual	Hand-in Assignment	Oct 3, 2023 by end of class	28.3%	Described in class
Thomas: Management Research Analysis	Individual & Group	Hand-in Assignment	Nov 1, 2023 11:59 PM	28.3%	Described in class
Danis: Written case analysis	Individual	Hand-in Assignment	Dec 1, 2023 submit prior to class via Brightspace	28.3%	Report providing analysis, diagnosis and recommendations for a business case, including application of pertinent course concepts/ frameworks
Positive Participation				15%	Assessed via online polling (ongoing dates throughout semester).
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that the instructor may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class.

The survey is vital to providing feedback to the instructors regarding the course and their teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of 10% for each day an assignment is late.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, is permitted in this course for students who wish to use them. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI.

Attendance:

Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student’s record in the Registrar’s office.

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- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
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- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor’s consent and cannot sell or profit from the instructor’s intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

Readings and class preparation instructions available on Brightspace. Please check often for updated information.

Title	Instructor	Date	Description
Introductions – No preparation required	ALL	Sep 6	Review class outline and expectations
Self: Perception, Personality, and Emotions	Leacock (1)	Sep 8	Our behaviour is shaped by our perceptions, personalities, emotions, and experiences. In this section, we consider the role that perception plays in affecting the way we see the world and the people around us. We also consider how personality characteristics affect our attitudes toward people and situations. We then consider how emotions shape many of our work-related behaviours. Focus: Perception [UB1]

	Leacock (2)	Sep 12	Focus: Unconscious Bias/ Emotional Intelligence [UB 2]
	Leacock (3)	Sep 13	Focus: Emotional Intelligence/ Resilience/ Wellness [EQ1]
Self: Values, Attitudes, and Diversity	Leacock (4)	Sep 15	In this section, we look carefully at how values influence behaviour and consider the relationship between values and attitudes. We also examine two significant issues that arise from our discussion of values and attitudes: how to enhance your job satisfaction and manage workforce diversity. Focus: Cultural Intelligence [CQ1]
	Leacock (5)	Sep 19	Focus: Diversity [CQ2]
Self: Communicating	Leacock (6)	Sep 20	Positive Communication for Inclusion. The goal of this section is to improve students' effectiveness as leaders, managers, and team members by introducing frameworks for understanding how positive communicative behaviors in the workplace as a means for building exceptional performance. Focus: Communicating for Inclusion [CX1]
	Leacock (7)	Sep 22	Focus: Communicating for Inclusion [CX2]
Self: Identifying your leadership frame	Leacock (8)	Sep 26	In this section, we explore leadership to determine four frames you can use to be an effective leader. Focus: Reframing ✚ Leading with a structural frame
	Leacock (9)	Sep 27	✚ Leading with a HR frame
	Leacock (10)	Sep 29	✚ Leading with a symbolic frame
	Leacock (11)	Oct 3	✚ Leading with a political frame
Introduction	Thomas (1)	Oct 4	Review Module 2: outline and expectations
Managing the Broader Context	Thomas (2)	Oct 6	Discussion of management, organization, and some useful key terms.
Planning with Purpose	Thomas (3)	Oct 10	Exploration of planning and goal setting in a fast changing world.
Team-Based Problem Analysis	Thomas (4)	Oct 11	Analyzing a problem and leveraging the group to improve analysis.
Presentations	Thomas (5)	Oct 13	Students will spend this class introducing their group to a management practice they have researched through the UVic library. They will begin to create an experiential learning activity for the class.
Organization and Diversity	Thomas (6)	Oct 17	Exploring forms of organization that are resilient, nimble, and welcoming.

Cultures of Leadership	Thomas (7)	Oct 18	Discussing classic and contemporary models of leadership.
Cultures of Leadership	Thomas (8)	Oct 20	Continued discussion of classic and contemporary models of leadership.
Leadership beyond the Organization	Thomas (9)	Oct 24	An expanded angle on what management and organization can mean within a broader social context
Relationship Economics and Indigenomics	Thomas (10)	Oct 25	Introduction to Indigenous context and doing business in Canada.
Evidence-Based Decision Making	Thomas (11)	Oct 27	Discussing the biases that can work their way into planning and measuring.
Evidence-Based Decision Making	Thomas (12)	Oct 31	Continued discussion of the biases that can work their way into planning and measuring.
The strategic management process	Danis (1)	Nov 1	Five tasks of strategic management Value creation and competitive advantage
The case methodology	Danis (2)	Nov 3	In-class case analysis and discussion
Establishing company direction - 1	Danis (3)	Nov 7	Strategic intent: Vision, mission, objectives
Establishing company direction - 2	Danis (4)	Nov 8	Strategy formulation Factors that shape strategy
Evaluating the external environment - 1	Danis (5)	Nov 10	External environmental analysis (e.g., scanning, monitoring, forecasting, assessing; segments of the general environment)
	NA	Nov 13, 14, 15	READING BREAK – NO CLASSES
Evaluating the external environment – 2	Danis (6)	Nov 17	Industry and competitor analysis (e.g., industry structure, competitive positioning, strategic rivalry)
Evaluating the internal organization - 1	Danis (7)	Nov 21	Value creation, resources, capabilities, core competencies (outsourcing)
Evaluating the internal organization - 2	Danis (8)	Nov 22	SWOT (i.e., integrated external and internal analysis)
Creating competitive advantage -1	Danis (9)	Nov 24	Generic strategies Business and corporate level strategies
Creating competitive advantage 2	Danis (10)	Nov 28	Cooperative and international strategies Q&A related to written case analysis assignment.
Written case analysis review			
Strategy implementation 1	Danis (11)	Nov 29	Discussion of written case 1: Identification of key issues CES administration

Strategy implementation 2	Danis (12)	Dec 1	Discussion of written case 2: Analysis, recommendations, and implementation.
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Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

COM 202

Financial Accounting I Fall 2023 Course Outline

WAITLISTED STUDENTS: To keep your spot, you must attend classes and prepare the materials for each class. Use the free two-week trial version of the textbook (see below).

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	A01 Mondays and Thursdays, 11:30-12:50 pm, CRN 10651 A02 Mondays and Thursdays, 2:30-3:50pm, CRN 10652
Location	A01 David Turpin Building(DTB) A102 A02 Clearihue Building(CLE) A127
Instructor:	Chris Graham, MBA, CPA, CGA (see link below for my bio) https://www.uvic.ca/gustavson/faculty/faculty/faculty/current/grahamc.php
Office:	Business and Economics Building (BEC) 258
Office hours: (drop-in)	Tuesdays 2:00-3:00 pm, Thursdays, 4:00-5:00 pm, or by appointment (due to the difficulty of “showing” accounting problems and solutions via Zoom, I generally recommend in-person appointments).
Email:	grahamc@uvic.ca

We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

***UVic is committed to promoting, providing and protecting
A supportive and safe learning and working environment for all its members.***

Introduction:

Hi, my name is Chris Graham and I’ve been with the Gustavson School of Business since 2003. I’ve taught a number of different courses (Accounting, Finance, Strategy, and Economics) at a variety of levels (Business Minor, BCom, and MBA). As a designated accountant (Chartered Professional Accountant-CPA BC) I am passionate about teaching accounting. Accounting is an essential component of running and understanding any business. So whether you go further in accounting or you just want to know the basics, this course is a great introduction.

For some students, accounting is an easy subject. For others it can be challenging. This is, in part, due to the fact that for many of us, it’s a new way of looking at financial numbers and how to organize them. It’s important to keep up with the readings and get in touch with me for help if/when you need it.

I’m looking forward meeting you and your classmates.

Texts and Resources:

Required: e-text (or loose-leaf text). While Wiley PLUS is not required for COM 202; it accompanies the e-text and can be used as an additional study aid. New textbooks should include Wiley PLUS as part of the purchase price. **N.B.** a previous edition is not suitable – the questions and accounting information/standards have changed

Financial Accounting, Tools for Business Decision-Making, 9th Cdn. Ed. with Wiley PLUS, Kimmel, Weygandt, Kieso, Trenholm, Irvine, Burnley.

The text is in the form of an e-text or a loose-leaf textbook– the Wiley access code for the e-text and access to the Wiley website for this course is available through the Uvic Bookstore <https://www.uvicbookstore.ca/text/>. Look for Com 202, your section and select the e-text. You will need to visit the Bookstore to get the loose-leaf version (which also has e-Text and Wiley PLUS).

N.B. For some reason the Bookstore has our textbook listed as “optional”. It is **not optional**. You will need the textbook to do the readings and the problems in order to learn accounting.

TRIAL VERSION: A free, two-week trial-version of the text and access to the Wiley PLUS website is available. See the **Wiley Course Information Flyer** posted in the COM 202 Brightspace website.

Calculator: A basic calculator is required for COM 202. It helps if it has a backspace correction key (you just entered an 8 digit number and the last digit was wrong.....), and a memory, but they are not essential. If you are planning to take COM 240 (Introduction to Finance) you might consider buying the **Texas Instruments BA II+** financial calculator available at the Bookstore.

Course Objectives and Description:

This course introduces financial accounting with an emphasis on the basic concepts, mechanics, objectives and judgments involved in financial statements. The major challenges and problems of financial reporting are much broader than just generating numbers. This course illustrates that financial reporting involves a great deal of judgment in order to provide the information required by the many stakeholders. Reporting by public and private companies in Canada has undergone significant transition from Canadian GAAP to multi-GAAP with the adoption of IFRS (International Financial Reporting Standards) in “accounting for public entities” as of January 1, 2011. As such, the focus in this course will be primarily on IFRS and financial reporting for an incorporated entity.

Specific objectives include:

1. Develop the ability to recognize, create and examine basic financial statements; the statement of comprehensive income (income statement), statement of changes in equity, statement of financial position (balance sheet), and the statement of cash flows.
2. Discuss the issues and judgments used in the identification, measurement, and communication of financial statement information.
3. Use the tools presented in the course to derive information from financial statements for use in developing potential solutions to business issues.
4. Enhance both oral and written communication skills through class discussion of theory and practice using problems.

Course Format:

The course consists of a combination of lectures and class discussions. Lectures supplement course materials to reinforce key course points and the use of problems and/or case studies will allow application of the theory and content. Students are expected to complete all assigned questions/work including reading the course materials, cases and/or other content posted and to be prepared for full and active participation in the class discussion. Developing an understanding of the material requires practice and students are strongly encouraged to complete problems in conjunction with their reading.

1. Read the assigned text materials for the upcoming week (see Course Schedule)
2. **Before Monday’s Class** go to Brightspace and download that week’s PowerPoint (PPT) slide deck. It is in the folder for the week that you are currently preparing for.
3. **In Monday’s and Thursday’s Classes** we will cover the theory with examples from that week’s assigned readings. Please read that week’s assigned readings before this class to best participate in the class discussions and generate content questions.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please

let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: Zoom Meetings (if used for office hours) and Wiley PLUS (elective component of the e-text). I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. For Wiley PLUS, the privacy policy and the terms of use list the personal information stored outside of Canada and are available at https://www.wileyplus.com/WileyCDA/privacy_policy.html.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Classroom Use of Technology:

Laptops and tablets will be allowed for use in Com 202 for the purpose of taking notes and for in-class exercises. All other uses are distracting to your learning, the learning of others, and to the instructor. The use of laptops or tablets for any purpose other than taking notes and completing in class exercises is strictly prohibited. **Please refrain from cell phone usage in class.**

Evaluation Elements:

Students will be evaluated according to the following schedule:

COM 202	Individual or Group	Type	Due Date	Weight / %of grade	Description
COM 202 Term Assignment	Individual.	Hand-in Assignment		15%	Posted on Brightspace
Part 1 6.2%			Part 1: Sun. Oct. 15		(Submit through Assignments on Brightspace)
Part 2 8.8%			Part 2: Sun. Nov. 5		
End of Week (6 quizzes x 1.5 mks each)	Individual	On-line Quiz	On-going—Sunday night for weeks assigned	9%	Brightspace Quizzes
Mid-term Exam	Individual	Exam	Thurs. Oct 19	28%	80-minute exam
Final Exam	Individual	Exam	UVic Registrar's exam schedule	48%	3-hour exam—comprehensive
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Note that it is required that you pass the examinations in aggregate (must achieve at least 38 marks out of the total 76 marks allocated to the exams) to pass the course. If you do not attain a passing aggregate grade in the exams, it will result in a final course grade of Incomplete (N), with the maximum possible percentage grade of 49.

Late/Missed Coursework or Assessments: Late penalties are outlined in the assignment documents. Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness, accident or family affliction) which interfere with their academic obligations. Your instructor must be advised immediately regarding any missed assignment submissions or absences from the midterm/final exam, and acceptable documentation (Self-Declaration Form found in the General Course Information folder in Brightspace) must be provided to your instructor as soon as possible. All graded components for the course must be completed and submitted or you may receive a final grade of **N**.

If, for some reason (e.g., illness, accident or family affliction), you are not able to complete a course component (i.e., End-of-Week Quiz or Part 1 of the Term Assignment) where there is typically no mechanism to “make-up” this work, you will need to inform your instructor **before** the due date. You will need to complete a Self-Declaration Form (found in the General Course Information folder in Brightspace) and provide this to your instructor. Your instructor may move the grade weight to the Mid-term exam or the Final Exam.

If a corrupted file is uploaded to a Brightspace Assignment drop box, late penalties will be applied, and the assignment may have a 0 grade applied. Ensure you are using the required programs to avoid file corruption.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Group Work:

In COM 202 all of the course work is individual. Any work that is submitted (e.g., assignments, quizzes, or exams) that is determined to be the product of group effort will receive a grade of 0%.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, is not recommended in this course. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted AI material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI. Please note that AI solutions for many accounting situations **do not result in great answers. In part, this is due to the fact that most AI solutions draw on U.S. accounting standards, which do not follow IFRS standards or rules that are used for accounting in Canada.**

Attendance and Participation:

Regular attendance is an expectation of the Gustavson School of Business. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. Attendance is a critical component of everyone's academic success.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that “A” grades are normally achieved by a minority of students.**

Percentage Range	Grade s	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

Note that it is required that you pass the examinations (must achieve at least 38 marks out of the total 76 marks attributed to the exams) to pass the course. In the case that you do not achieve this, it will result in a final course grade of Incomplete (N), with the maximum possible percentage grade of 49.

“N” (incomplete) grades: All graded components must be completed or you may receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business Minor need a minimum grade of **C+** in each of the fundamental courses: **Com 202, Com 220, Com 240, Com 250 and Com 317.**

Final course grades are official only after they have been approved by the Undergraduate Academic Director and may be subject to change up until that point.

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student’s record in the Registrar’s Office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.

- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Learning Styles:

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

Schedule Summary:

Complete term schedule is posted separately on Brightspace

<u>Week</u>	<u>Topic</u>	<u>Date</u>	<u>Description/Readings</u>
1	Course Introduction What is Financial Accounting? Forms of Business Organizations	Thurs., Sept. 7 (C1)	Ch 1 Purpose and Use of Financial Statements (Read the full chapter, but we will come back to financial statements in Week 2) Ch 11 Forms of Business Organizations pp. 11-3 to 11-6
2	The Accounting Framework Income Statement – Multi-Step (only) And two basic ratios Statement of Changes in Equity Statement of Financial Position	Mon. Sept 11 (C2) Thurs. Sept 14 (C3)	Ch 2 A Further Look at Financial Statements pp. 2-21 to 2-27 Ch 5 <i>Merchandising Operations</i> pp. 5-23 to 5-28 (N.B. ONLY the Multi-Step Income Statement will be used in this course so do not refer to the example on page 5-22) Ch 1 pp. 1-19 to 1-20 Ch 2 pp. 2-1 to 2-13 N.B. There are posted "sample" financial statements in the Week 2 folder, which follow the expected formatting for assessments.



COM 220

Organizational Behavior

(A01 & A02) FALL 2023

Note: please check your course and program sites frequently for new updates and course changes.

Course hours(PST) & Location	(A01) Mon & Thurs 8:30am - 9:50 am, David Turpin Building A102 (A02) Mon & Thurs 11:30am - 12:50pm, David Turpin Building A110
Instructor:	Andie(JungWon) Lee, Ph.D.
Office:	BEC 202
Office hours:	By appointment (in-person or via zoom)
Email:	For all course-related questions: COM220lee@uvic.ca This is the best way to reach me. Either the TA or I will normally answer your emails in less than 24 hours, but expect some delay during weekends. For other questions: jwalee@uvic.ca

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UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Introduction:

How do individuals' (employees') differences, their interactions, and shared values influence the success or failure of organizations? This course seeks to develop your overall understanding of organizations by looking at them through the lens of **human behavior**, manifested in **individuals, relationships, and groups** in organizations. We will be learning some core behavioral concepts in psychology, sociology, and social psychology such as personalities, values, motivation, conflict, and culture in an organizational context and how they impact organizations' performance.

Texts and Resources:

Required text: <https://www.uvicbookstore.ca/>

McShane, S., Steen, S., & Tasa K. (2018). *Canadian Organizational Behaviour (11th ed.)*. Toronto, Canada: McGraw-Hill Ryerson.

Readings and cases: COM220 may make use of articles that are available free from Business Source Complete (UVic Library). Additional class readings will be available on Brightspace, UVic Summon (Business Source Complete), or online.

Course Objectives and Description:

The course objectives are to:

- **Understand** how human behavior -- employee's differences, their relationships, and their shared values -- drive decisions and actions in organizations
- **Develop** your competence in navigating through your current or future organizational life using the knowledge gained in this course
- **Apply** the organizational behavior concepts in real-life organizational situations

Course Format:

A blend of lectures, discussions, in-class exercises, individual assignments, tests, and team assignments will be employed.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

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The following educational technologie(s), which stores or accesses your personal information outside Canada, may be required for this course: **Zoom, Microsoft Teams, Youtube** and **Mentimeter**. I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available in the following links: [Zoom](#), [MSTeams](#), [Youtube](#), [Mentimeter](#). I encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type	Due Date	Weight / % of grade	Description
Mid-Term Exam	Individual	In-Person Exam	10/19/2023 During class time	25%	In-Person Exam Details to be announced in class
Final Exam	Individual	In-Person Exam	TBD	35%	In-Person Exam Details to be announced in class
Group Assignment: (1) Report	Group	Written Submission	11/26/2023 11:59PM	20%	Students will work in groups and present their findings with team reports and oral presentations. Details to be announced in class
Group Assignment: (2) Presentation	Group	Oral Presentation	11/27 & 11/30/2023	10%	
Contribution	Individual	Participation	Ongoing throughout term	5%	Attendance and in-class participation
Group Exercises	Group	In-Class Exercise	See class schedule	5%	Students will work in groups during the class
Total				100%	

Exams: There will be two exams in this course, a midterm and a final exam. The midterm makes up 25% and the final exam 35% of the overall grade. The midterm exam will cover all material up to the midterm. The final exam will cover the rest course material.

Exams might contain multiple-choice questions, true/false questions, and short answer questions. All in-class material (e.g., readings, lecture content, discussions by fellow students in the class, videos, learning exercises and the like) will be fair game for exams. More information about the exams will be provided in class as well as on Brightspace site as the exam date nears.

The **Mid-Term Exam** will be held on **October 19th** during the scheduled class time frame. Students who miss the midterm exam without a valid excuse (such as cases of illness, accident or family affliction) will not have an opportunity to make up this grade component. Please make every effort to take the midterm exam at the prescribed date and time.

The **Final Exam** will be scheduled during the University's designated final exam period (the exact date and time will be announced in class and on Brightspace when scheduled by the university). As a general policy, a make-up final exam will not be given, except in cases of illness, accident or family affliction.

Group Assignments: Details of this assignment will be announced in class and on Brightspace.

All group assignments should be *electronically* submitted on Brightspace. Email submissions will not be accepted unless this has been authorized prior to the due date by the instructor. Late assignments, in the absence of a medical or family emergency, will result in a grade penalty of 10% for each day an assignment is late.

Contribution: Contribution include, but not limited to the following:

- Class attendance (see page 5)
- In-class participation based on the following criteria
 - Raising and answering questions
 - Sharing ideas, insights, and feelings
 - Sharing personal experiences and observations
 - Sharing relevant examples from industry and practice
 - Relating and synthesizing ideas of others

- Providing constructive feedback on the learning climate and processes in the classroom
- Helping others develop their views and ideas
- Pointing out relationships to earlier discussions

Also, please note that being late, walking in and out of the classroom, or leaving early from class not only detracts from the learning environment but will also result in poor contribution marks; in addition, such behavior may be treated as an unexcused absence for that session.

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty."

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, is not permitted in this course.

Attendance and Participation:

Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

In this course, your attendance may impact your *Contribution* scores (5%) as well as your *Group Exercise* scores (5%). It is your responsibility to determine the nature of your absences (i.e., can they be excused or unexcused?) and communicate with the instructor/TA in a timely manner.

*Unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site and should be emailed to COM220lee@uvic.ca in a timely manner. In case your reason for absence is not fully covered by a self-description form, you must write an email to COM220lee@uvic.ca with an explanation in a timely manner.

Once your unexcused absences exceed 3 sessions, you will receive 5% reduction from your final course grade for every additional unexcused absence. In addition, if you have more than 5 unexcused absences, you may not be permitted to write the final examination.

Additionally, in case you miss any classes that include in-class group exercises (see the schedule for exact dates), it may also impact your group exercise scores.

- In case of excused absences, you will get the same scores as your team members. **However, your team members may refuse to give you the same score for the reasons such as a consistent lack of team contribution (e.g., little or no contribution to the team activities/projects). Such decisions by team members must be communicated with and confirmed by the instructor.
- In case of unexcused absences, you will receive zero score on that particular group exercise.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that “A” grades are normally achieved by a minority of students.**

Percentage Range	Grade s	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Final course grades are official only after they have been approved by the Academic Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the

following: For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- Using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

The below schedule is subject to change. I strongly recommend visiting our Brightspace course site (<https://bright.uvic.ca/d2l/home/307576>) for the latest schedule as well as additional class preparation materials.

Class/Session		Topic	Reading	Remarks
Class 1	Sept. 7	COURSE INTRO	CH1(pp. 1-26)	
	Sept. 11	INTRODUCTION TO OB		
Class 2	Sept. 14	PERSONALITY AND VALUES	CH2 LO1(pp. 31-36) LO5(pp. 48-51)	
	Sept. 18			
Class 3	Sept. 21	MOTIVATION	CH5 LO1-LO4(pp. 114-126) LO7 (pp. 133-138)	<i>*In-class group exercise #1</i>
	Sept. 25			
Class 4	Sept. 28	POWER AND INFLUENCE I	CH10 LO1(pp. 260-267) LO4(pp. 274-278)	No class on Oct. 2 (National Day for Truth and Reconciliation on Sept. 30)
	Oct. 5			
Class 5	Oct. 12	POWER AND INFLUENCE II MID-TERM REVIEW	CH10 LO3(pp. 269-274)	No class on Oct. 9 (Thanksgiving Holiday)
	Oct. 16			
	Oct. 19	<i>MIDTERM EXAM</i>		
Class 6	Oct. 23	GROUP ASSIGNMENT CHECK-IN & WORKSHOP		
	Oct. 26	TEAM (GROUP) DYNAMICS	CH8 LO2 – LO4 (pp. 202-218)	
Class 7	Oct. 30	PERCEIVING OURSELVES AND OTHERS	CH3 LO1 – LO3 (pp. 58-74)	
	Nov. 2	SPECIAL WORKSHOP: Foundations to Equity, Diversity, and Inclusion.		*10:00AM – 11:20AM This workshop is a part of Uvic's 5 Days of Action (Oct. 30 to Nov. 3)
Class 8	Nov. 6	CONFLICT	CH11 LO1 & LO2 (pp. 287-292) LO4 (pp. 296-299)	<i>*In-class group exercise #2</i>
	Nov. 9			
Class 9	Nov. 16	LEADERSHIP	CH12 LO1 & LO2 (pp. 316-323)	No class on Nov. 13 (Reading Break)
Class 10	Nov. 20	CULTURE FINALEXAM REVIEW	CH14 LO1-LO3 (pp. 367-378)	<i>*In-class group exercise #3</i>
	Nov. 23			
Class 11	Nov. 27	GROUP ASSIGNMENT PRESENTATIONS		Group assignment report due on Nov. 26
	Nov. 30			
	TBA	<i>FINAL EXAM</i>		

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



COM 240 A01 & A02 Management Finance

Fall 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours:	A01: Monday 18:00 – 20:50 A02: Mon, Thu: 10:00-11:20
Location:	A01: Clearihue Building, A127 A02: David Turpin Building, A104
Instructor:	Sorin Rizeanu, PhD
Office:	BEC 478
Office hours:	Tuesday 13:00-15:00
Telephone:	250-472-5382
Email:	srizeanu@uvic.ca Preferred contact method. Please put in email subject COM240

We acknowledge with respect the Lekwungen-speaking peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

*UVic is committed to promoting, providing and protecting
A supportive and safe learning and working environment for all its members.*

Texts and Resources:

Booth, Cleary, and Rakita, *“Introduction to Corporate Finance”*, Fifth Edition, Wiley ISBN : 978-1-119-56162-0.

E-book is perfectly usable and probably the cheapest version. You can also rent it if necessary. If you prefer the paper version, it should be available for purchase online or at the Campus Bookstore.

<https://www.wiley.com/en-ca/Introduction+to+Corporate+Finance%2C+5th+Canadian+Edition-p-9781119561620>

MS Excel:

Students are required to have and be able to use MS Excel, at least at beginner level proficiency. In the business world, more than 60% of businesses use spreadsheets. Beyond having all the important financial functions already integrated, Excel’s formatting tools make your results easy to present and explain.

Course Objectives and Description:

This course serves as an introduction to corporate financial management. The primary objective is to provide the framework, concepts, and tools for making/analyzing financial decisions. Topics covered include discounted cash flow techniques, capital budgeting, project evaluation, risk and return tradeoffs, diversification, and the cost of capital.

Upon completing the course, students should be able to define basic terminology, to understand the theoretical relationships, and to apply the analytical techniques covered in the course to various decision-making situations. Problem-solving and decision-making skills will be practiced through examples and problem assignments.

Course Format:

The course is an introduction to corporate financial management. It consists of lectures designed to provide the framework, concepts and tools for analyzing financial decisions. The lectures are structured as active discussions, not only presentations of information and students are expected to actively participate.

Students are responsible for reading the assigned material, and are expected to come to class fully prepared. Questions will be asked and discussed in class and each student is to actively participate in these discussions. Cold calls will be made.

Educational Technology

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because

disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type	Due Date PT	Weight / % of grade	Description
COM 240 –Pervasive competencies	Individual	Other	Every class	10%	Attendance, speaking, sound judgement, professionalism.
COM 240 –Quizzes	Individual	Quiz	Every week	30%	10minutes quiz, 2-3 questions
COM 240 –Final Exam	Individual	Exam	To be determined	40%	Multiple choice exam
COM 240 –Excel Project	Group Work	Other	End of Course	20%	Buy/Rent Project
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

1. Pervasive competencies (PC)

This include:

- (i) Demonstrating professional skills such as sound judgment and effective communication.
- (ii) Exhibiting ethical behavior, professionalism and integrity.

Note:

- (i) The grade for the PC assessment will not be released until the time the course is completed and the final exam is marked.

2. Reading Checks Quizzes

To properly insure that students cover the material in a timely and balanced manner, every week of classes a quiz will be taken. 10 minutes, 2-3 questions from the previous week material.

- (i) No additional time or make-up quiz will be given due to lateness or absence.

- (ii) If the absence is excused the final examination will be assigned the proportionate amount of additional weight.
- (iii) Students absent for more than five quizzes may be denied permission to write the final examination.

3. Final exam

- (i) The final exam will be 2 hour long and will examine material covered in the lectures, discussion in class and text readings and questions.
- (ii) The instructor must be advised immediately regarding absence from the final exam.

4. Group Project

Each group of 4-5 students will submit their solution to a case study.

At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Course Experience Survey:

The BCom Program and its instructors value your feedback. As with all of our courses, you will be expected to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the Program make improvements.

Time will be set aside in one of the last synchronous sessions in the course for you to complete the online survey; you will need to use your UVic Netlink ID to access the survey, which can be done on your laptop, tablet or mobile device. As well, toward the end of the course, you will also receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey if you don't do so in the time provided in class.

Course Assessment:

Description of evaluation standards for evaluation elements.

Group Work: The purpose of group work is to enhance your skill in working collaboratively. When a group-based assignment forms part of your evaluation for a grade, all members of the group will receive the same grade. Any exception to this policy, such as adjustments for relative contribution, will be specified in writing prior to the grading of the assignment.

At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

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2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Attendance and Participation: The University of Victoria Calendar states: “Students are expected to attend all classes in which they are enrolled.” Participation exposes you to material not in the readings, to your classmates’ insights and helps clarify material that can lead to better performance in the course.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, **is not permitted** in this course for students. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grade s	Grade Point Value	Description
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“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

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For 400-level courses:

Grade Range	Proportion Of Class
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B's	25-45%
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D, F	0-10%

Academic Integrity:

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- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
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- taking any unauthorized materials (crib notes) into an examination or term test.

- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
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The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

This is provided as a guide and is subject to revision. Changes will be announced in class and posted on the COM 371 course site.

Week	Lecture #	Week of	Topic	Quiz #
1	1	11-Sep	Intro	
	2		Corporate Governance	
2	3	18-Sep	Time Value of Money	1
	4		Loans and Mortgages	
3	5	25-Sep	Bonds I	2
	6		Bonds II	
4	7	2-Oct	Equity I	3
	8		Equity II	
5		9-Oct	Thanksgiving Day	
			Review I	4
6	9	16-Oct	Risk Return Portfolio I	
	10		Risk Return Portfolio II	
7	11	23-Oct	CAPM	5
	12		Investing 101	
8	13	30-Oct	Calls and Puts	6
	14		Calls and Puts	
9	15	6-Nov	New Issues -Crypto	7
	16		New Issues -Crypto	
10		13-Nov	Reading Break	
11	17	20-Nov	Cap Budgeting	8
	18		Cap Budgeting	
12	19	27-Nov	WACC	9
	20		International Tax	
13		4-Dec	Review II	10

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

THIS VERSION: JAN 3, 2024

COM247 (A01)

Personal Financial Management Spring

2024 Course Outline

Note: please check your course and program sites frequently for updates and course changes.

Course hours (PST)	Monday and Thursday, 11:30-12:50
Location	ECS 124
Instructor:	Professor Michael R. King
Office:	BEC 246
Office hours:	Thursdays 13:30-14:30 or email for appointment
Email:	michaelking@uvic.ca

We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environments for all its members.

Introduction:



My name is Michael King. Please call me “Michael,” not Professor, Dr. or Mr. King. I joined Gustavson in July 2019. I went to high school in Victoria, then left to travel the world. I lived in seven countries for more than a year each. I met my German wife in London, UK. We have two sons (24, 21) who are both at UBC. We are all glad to be living in beautiful BC!

Prior to UVic, I taught at Western University’s Ivey Business School (2011-2019) where I co-founded Canada’s first fintech research centre. Before joining academia, I worked in investment banking in Zurich, New York and London from 1990-1998 (Credit Suisse, RBC Dominion Securities) and central banking in Ottawa and Basel from 2001-2011 (Bank of Canada, BIS). I have an MSc and PhD from the London School of Economics and have earned the CFA designation. My research focuses on climate finance, fintech, banking, international financial markets, and corporate finance.

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodation, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodation. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

Texts and Resources:

REQUIRED:

Personal Finance, 8th Edition (2021, McGraw Hill Canada)

by Jack R. Kapoor, Les R. Dlabay, Robert J. Hughes, Lewis Stevenson, Ernest J. Kerst

ISBN eBook: 9781260890167 \$59.00 180 day / \$99.00 lifetime

ISBN print textbook: 9781260326956 \$139.95 (available in UVic Campus Bookstore or online)

Students are encouraged to use a digital copy of the textbook (eBook) which is available for rent or purchase from McGraw Hill Canada at this website:

<https://www.mheducation.ca/personal-finance-9781260326956-can-group>

When purchasing the eBook, you do NOT need to purchase access to McGraw Hill CONNECT.

OPTIONAL:

I will post news stories and articles from leading media outlets: The Economist, Bloomberg, The Globe and Mail, and others. The stories will be timely, interesting, and relevant. I will not overwhelm you, but this real-world content will bring the course to life! This material is important for your personal development. I hope you will read it, but it will not be assessed.

Course Objectives and Description:

This course gives students the tools to take charge of their financial lives. It provides answers to the financial questions that everyone asks themselves:

1. How do I manage my finances?
2. Where does my money go?
3. How much am I earning?
4. Where should I put my money?
5. How much can I borrow?
6. How should I borrow?
7. Should I buy a car?
8. Should I buy or rent a place to live?
9. Where should I invest?
10. Do I need insurance?
11. Will I be able to retire?
12. Can I trust this email from my bank?

These questions cover financial wellbeing, budgets, work and taxes, debt and credit, investing in real and financial assets, insurance, retirement savings, and phishing. By completing this course, students will be ready to make educated financial decisions and manage their personal finances. The three major learning outcomes are:

Promote Financial Well-Being:

- Students will feel empowered with the knowledge and skills necessary to achieve and maintain financial well-being. Through an exploration of personal financial planning, budgeting, and prudent decision-making, students will be equipped to navigate the complexities of their financial lives, fostering a sense of security and stability.

Build Financial Acumen:

- Students will cultivate confidence in proactively building and managing their financial resources. By imparting essential concepts such as effective budgeting, strategic saving, and informed investing, the course aims to instill the confidence needed for students to take control of their finances, ensuring a resilient and prosperous future.

Avoid Financial Pitfalls:

- Recognizing the significant impact of debt on financial well-being, students will be armed with the knowledge to avoid common pitfalls associated with borrowing. By delving into responsible borrowing practices, debt management strategies, and understanding the consequences of consumer credit, students will be better equipped to make informed decisions and safeguard themselves from the adverse effects of excessive debt.

COM247 is divided into eleven modules with these associated learning outcomes.

1. Personal Financial Planning:

Students will develop comprehensive personal financial plans, integrating short-term and long-term financial goals, considering factors such as income, expenses, and life events, to make informed decisions for financial well-being.

2. Budgeting and Saving:

Through practical exercises, students will learn to create effective budgets, identify areas for potential savings, and implement strategies to build a financial cushion, fostering responsible financial habits for a secure future.

3. Personal Income Taxes:

Students will navigate the Canadian tax system, understand deductions from wages, tax documents, and tax planning strategies. They will learn to make informed decisions about whether to file their taxes independently or enlist the services of an accountant, considering factors such as complexity, cost, and potential benefits to optimize their tax outcomes.

4. Banking and Financial Services:

Students will understand the range of banking products and financial services available in Canada, enabling them to make informed choices regarding types of accounts (including TFSAs) and short-term investment options (GICs, high-interest savings accounts).

5. Debt and Consumer Credit:

Students will explore the impact of debt on personal finances, learning responsible borrowing habits, effective debt management strategies, and the importance of maintaining a healthy credit score.

6. Owning a Car:

Students will learn the financial aspects of owning and maintaining a vehicle, covering purchase, insurance, financing options, maintenance, and the impact of transportation choices on overall financial health.

7. Buying vs. Renting Real Estate:

Students will evaluate the financial implications of homeownership versus renting, considering factors such as market trends, real estate and closing costs, mortgage options, and long-term financial goals.

8. Investing in Stocks, Bonds and ETFs:

Students will learn the fundamental principles of investing, including risk and return tradeoffs, portfolio diversification, fees, the features of financial securities (stocks and bonds) and the benefit of investment vehicles (mutual funds and exchange traded funds). They will learn how to get started, compare self-directed investing with other options, consider dollar cost averaging, and take into account trading costs.

9. Understanding Insurance:

Students will gain a basic understanding of insurance products, including employment, health, auto insurance, property, life and travel. They will learn about the importance of protecting themselves and their assets.

10. Planning for Retirement:

Students will learn about alternative retirement savings vehicles, develop retirement savings strategies, and explore investment options to set up for a secure and well-planned financial future.

11. Phishing, Consumer Scams and Identity Theft:

Students will learn to recognize phishing and consumer frauds and protect themselves against identity theft. They will learn how to safeguard their personal and financial well-being from cybersecurity threats.

Course Format:

Our weekly classes will be held face-to-face unless specified otherwise. Please watch for emails and check the course website on Brightspace. Our classes are facilitated discussions where we hold a discussion and work through financial calculations together. I hope to hear your thoughts, experiences, and questions. I will facilitate the discussion, keeping things on track by asking questions. A class is more interesting when everyone actively participates.

Each class will have designated readings. We will touch on some but not all of this material during our classroom discussions. During class, I may split you up into buzz groups of 2 to 4 to brainstorm on a topic and then rejoin the group to share your insights.

Research on the mind demonstrates that we learn better when we take in chunks of information, we practice it (repetition), and we evaluate it. This process allows your mind to create new neural pathways, programming your brain to remember more chunks¹. Each week, you will need to complete a quiz on Brightspace to evaluate your comprehension. Each week's quiz will cover the topics from the recent classes, focusing on the assigned readings and slides from class. Optional articles and postings will benefit you but will not be examined in quizzes.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community.

Please let me know if I can do better to support your rights in our classroom. You can email me to meet privately or send me feedback. I will do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology

I use a variety of educational technology in this course including Excel, internet-based technologies or web-based applications (Brightspace), cloud services and news media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

We will be using Excel extensively in this course. Excel is the main tool used for modeling personal finances. It surpasses financial calculators as it offers dynamic, customizable, and professional-grade financial analysis. Excel's versatility aligns with workplace standards, making it an essential skill for career success.

Students unfamiliar with Excel should prioritize mastering this tool for its real-world applicability and wide-ranging financial modeling capabilities. You can find introductory videos on YouTube, including the series "Excel for Beginners" from *Technology for Teachers and Students* at:

https://www.youtube.com/playlist?list=PL_iwD7O7FG7i6PCpD7cSoW3AkvSgS0Vgqj

¹ See Barbara Oakley, "Learning how to learn", Coursera, <https://www.coursera.org/learn/learning-how-to-learn>.

Within Excel, you can find tutorials by typing “Excel for Windows training” in the bar “Tell me what you want to do....”

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC’s Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual, for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: **Excel, VitalSource Bookshelf, the McGraw Hill mobile app (if using eBook), and potentially Zoom.** I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at the link below. I encourage you to read these documents.

<https://support.vitalsource.com/hc/en-us/articles/201646123-VitalSource-Technologies-LLC-Privacy-Policy>

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Evaluation Elements:

Students will be evaluated based on the following five elements:

CATEGORY	Individual or Group	Type	Due Date	% of grade	Description
1. Attendance	Individual	Participation	Every class	10%	Sign in, on time, not disturbing learning of your classmates
2. Weekly quizzes	Individual	Brightspace quiz	Weekly, complete from Friday to Sunday	25%	Complete ten 30-minute quizzes based on readings and slides.
3. Weekly individual assignments	Individual	Brightspace upload	Due by start of class	25%	Complete eight individual assignments and submit prior to class.
4. Team capstone project	Teams	Upload Assignment	8 April 20:00 PT	15%	Teams of 5 students submit a financial plan (with Excel spreadsheet).
5. Final exam	Individual	In person	To be scheduled	25%	2 hours

Attendance (10%)

I will have a sign-in sheet for class each week. Find your name and sign next to it as you enter or leave class. If you forget to sign-in, please email me to confirm your attendance, summarizing something that we discussed in class. It is part of our academic integrity standards that you only sign for yourself, and not an absent classmate.

Weekly Quizzes (25%)

Students will complete ten (10) quizzes worth a combined total of 25% of their final grade. Each quiz will be on Brightspace. Quizzes will be scheduled once per week, starting in the second week of the course. Each quiz will cover the assigned readings and covered over the previous week, unless specified otherwise. Several quizzes will cover multiple classes. You should have your reading materials available and an Excel spreadsheet for any calculations.

Your weekly quiz will open on Friday at 08:00 PT and must be completed by Sunday at 20:00 PT. Students will have 30 minutes to complete the quiz once it has begun. At the end of 30 minutes, the quiz will close automatically, and any work will be submitted. Students with accommodation will receive the appropriate additional time.

A failure to attempt a quiz will lead to a grade of 0% on that quiz. Your grade for the quiz and feedback will be released by Monday 11:30 PT.

If you experience technical difficulties, please email your instructor with an explanation of what happened as soon as possible. Based on your circumstances, your instructor will then decide whether to reset your quiz or not. Please allow for delays if you are emailing over the weekend.

Quiz	Opens Friday 08:00 PT	Closes Sunday 20:00 PT	Class	Chapters
1	Fri-19-Jan-24	Sun-21-Jan-24	1-4	Ch. 1, 2
2	Fri-26-Jan-24	Sun-28-Jan-24	5-6	Ch. 3, 4
3	Fri-2-Feb-24	Sun-4-Feb-24	7-8	Ch. 5
4	Fri-9-Feb-24	Sun-11-Feb-24	9-10	Ch. 6
5	Fri-16-Feb-24	Sun-18-Feb-24	11-12	Ch. 1-6
6	Fri-1-Mar-24	Sun-3-Mar-24	13-14	Ch. 7
7	Fri-8-Mar-24	Sun-10-Mar-24	15-16	Ch. 10-11
8	Fri-15-Mar-24	Sun-17-Mar-24	17-18	Ch. 12-13
9	Fri-22-Mar-24	Sun-24-Mar-24	19-20	Ch. 8-9
10	Fri-5-Apr-24	Sun-7-Apr-24	21-23	Ch. 14

Quizzes will consist of qualitative and quantitative questions. A question may be multiple choice, match the answer, or some other Brightspace format that can be graded automatically. For some quantitative questions, you will be asked to enter the numerical answer based on the inputs given. You will not be able to show your work. You are expected to use Excel to get the correct answer. If you make a mistake in Excel and submit the wrong number on Brightspace, you will get the question wrong. It is your responsibility to learn how to use this tool effectively.

It is the responsibility of a student seeking special accommodation to ensure that they have completed the appropriate documentation with the UVic Centre for Accessible Learning (CAL). It takes time for a letter of accommodation to be sent to the instructor, and for the adjustments to the quiz to be made in Brightspace. Please make sure to submit your request for accommodation early to ensure this process is

completed by the time of your quiz. For more information on this process, please visit <https://www.uvic.ca/services/cal/> or email calexam@uvic.ca

Weekly Individual Assignments (25%)

The eight weekly individual assignments are worth 25% of your final grade. They are due by 20:00 PT on the date shown. You will be provided with an Excel template. After completing the spreadsheet offline, you either upload the assignment on Brightspace or enter your answers in a designated assignment quiz. We will be discussing some of these assignments in class. For this reason, students failing to complete the associated assignment quiz on Brightspace by deadline will receive a grade of 0% on this assignment.

The assignments are as follows, with more detail and the Excel template to be provided on Brightspace and in class:

#	Due by 20:00 PT	Topic:
1	Wed-17-Jan-24	Assignment 1: University budget calendar year 2024
2	Wed-24-Jan-24	Assignment 2: Salary, deductions, and taxes
3	Wed-7-Feb-24	Assignment 3: Cash flow statement Jan (A)
4	Wed-14-Feb-24	Assignment 4: Credit affordability & capacity
5	Wed-28-Feb-24	Assignment 5: Buying & selling a car
6	Wed-6-Mar-24	Assignment 6: Buying & selling a condo
7	Wed-20-Mar-24	Assignment 7: Cash flow statement Feb (B)
8	Wed-27-Mar-24	Assignment 8: Income needs in retirement

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Team capstone project (15%)

You will work in a team of 5 to complete a capstone project on personal financial planning. You will receive explicit instructions in class, with details posted on Brightspace. This project is due April 8, 2024, by 20:00 PT. One team member will email the final team report to michaelking@uvic.ca, copying the other team members.

Final exam (25%)

There will be a two-hour final exam during the exam period, worth 25% of your final grade. This exam will be completed in person. Details will be provided in class and posted on Brightspace.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. Also, toward the end of the term, you will receive an email inviting you to

complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, putting diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: For quizzes, there is no flexibility on the deadline. In the absence of a medical or family emergency there will normally be a grade penalty for late individuals assignments and the team project. The final grade on late work will be reduced by 5% for every 24 hours after the due date and time.

Use of Artificial Intelligence (AI), including ChatGPT:

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. I believe that AI tools, including ChatGPT, will be an important part of your career, enhancing your productivity. I encourage all students to familiarize themselves with these tools. ***These AI tools are permitted for the team capstone project in this course for students who wish to use them.*** To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI. Assignment guidelines will provide additional guidance as to how these tools might be part of your process for each assessment this semester and how to provide transparency about their use in your work.

Attendance and Participation:

Regular attendance is a critical component of everyone’s academic success and an expectation for Gustavson School of Business courses. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates’ learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates’ insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning experience. Being an effective team member requires you to be present and engaged in the classroom environment.

Your success in this course is tied to your active participation and engagement. Attending classes, participating in discussions, and contributing to the learning environment are crucial elements that

enhance your understanding and application of financial concepts. To foster a positive and collaborative learning experience, we encourage regular attendance and active involvement in all course activities.

Your presence in class is not just about meeting a requirement; it is an investment in your future. Actively participating in discussions allows you to gain diverse perspectives, ask questions, and share insights. These interactions contribute significantly to your comprehension of personal financial management principles.

The skills you develop through active participation – effective communication, critical thinking, and teamwork – are essential for success in your future careers. Employers highly value individuals who not only possess technical knowledge but also demonstrate effective communication skills and the ability to work collaboratively. Your engagement in class discussions will not only deepen your understanding of personal finance but also cultivate these sought-after skills, positioning you for success in the competitive landscape of the professional world.

I understand that unforeseen circumstances may arise, and I encourage open communication. If you encounter challenges attending a class, please reach out in advance. Remember, your active involvement is an investment in your education and future success. Together, let's make this learning journey enriching, interactive, and beneficial for your personal and professional growth.

Attendance is a graded component of this course worth 10% of your final grade. I will ask each student to sign-in to class. Students with unexcused absences from **more than three classes** may not be permitted to finish the course. An unexcused absence is an absence without appropriate documentation (self-declaration form). To document an excused absence (illness, injury or family affliction), please submit the Gustavson self-declaration form. No medical documentation is required. Students need to email this self-declaration form to michaelking@uvic.ca by 18:00 on the day of the missed class. Self-declaration forms can be found in the Brightspace course site.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that "A" grades are normally achieved by a minority of students.**

Percentage Range	Grade	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding, and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good, and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.

0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed, or you will receive a failing grade of N (grade point value of 0). Final course grades are official only after they have been approved by the Academic Director and may be subject to change up until that point.

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student’s record in the Registrar’s office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation.
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g., personal communication, ideas from a verbal presentation) without referencing the source.
- copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor’s consent and cannot sell or profit from the instructor’s intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

CLASS	DATE	TOPICS	READING
		MODULE	Personal Financial Planning:
1	Mon-8-Jan-24	Financial wellbeing, taking charge of your financial life, goals, time (TVM) & education	Ch.1
2	Thu-11-Jan-24	The Wealthy Barber: Pay yourself first (10% solution), compounding (TVM)	Ch.1
		MODULE	Budgeting and Saving
3	Mon-15-Jan-24	Map your spending habits, financial records, apps	Ch.2
4	Thu-18-Jan-24	Create a budget (personal cash flow statement)	
		MODULE	Personal Income Taxes
5	Mon-22-Jan-24	Personal income tax, deductions (EI, CPP), forms, filing, refunds (GST/HST credit, CAIP)	Ch.3
		MODULE	Banking and Financial Services
6	Thu-25-Jan-24	Banking, GIC, HISA, TFSA	Ch.3, 4
7	Mon-29-Jan-24	GUEST SPEAKER #1	
		MODULE	Debt and Consumer Credit
8	Thu-1-Feb-24	Credit Scores, debt (revolving, instalment), servicing & affordability/capacity	Ch.5, 6
9	Mon-5-Feb-24	TVM, interest rates, variable (prime rate) vs fixed, central bank, effective annual rate, PV, FV	Ch.5, 6
10	Thu-8-Feb-24	Revolving (credit cards, LoC, overdraft) vs Instalment (student loans)	Ch.5, 6
		MODULE	Owning a Car
11	Mon-12-Feb-24	Car buying, auto loan, insurance, gas, maintenance, resale	Ch.5, 6
12	Thu-15-Feb-24	Review Class	
	Mon-19-Feb-24	Family Day	
	Thu-22-Feb-24	Break	
		MODULE	Buying vs. Renting Real Estate
13	Mon-26-Feb-24	Process: MLS, realtors and fees, closing costs, mortgages	Ch.7
14	Thu-29-Feb-24	Rent vs. Buy case	Ch.7
		MODULE	Investing in Stocks, Bonds and ETFs
15	Mon-4-Mar-24	Stocks, risk and return	Ch.10, 11
16	Thu-7-Mar-24	Bonds, credit risk	Ch.12
17	Mon-11-Mar-24	Mutual funds and ETFs, portfolios, diversification	Ch.13
18	Thu-14-Mar-24	Brokerage, indexing / passive investing, dollar cost averaging, trading costs, crypto	Ch.10, 13
		MODULE	Understanding Insurance
19	Mon-18-Mar-24	Employment insurance, health, auto, home, life, travel	Ch.8, 9
20	Thu-21-Mar-24	GUEST SPEAKER #2	
		MODULE	Planning for Retirement
21	Mon-25-Mar-24	Pension plans, RRSP, OAS, CPP, inflation	Ch.14
22	Thu-28-Mar-24	Retirement exercise	Ch.14
	Mon-1-Apr-24	Easter	
		MODULE	Phishing, Consumer Scams, and Identity Theft
23	Thu-4-Apr-24	Avoiding Phishing, Scams and Identify Theft	---
24	Mon-8-Apr-24	Review Class	
	Thu-11-Apr-24	Exams begin	



CLASS	DATE	TOPICS	READING	Quiz	Assignment
MODULE Personal Financial Planning:					
1	Mon-8-Jan-24	Financial wellbeing, taking charge of your financial life, goals, time (TVM) & education	Ch.1		
2	Thu-11-Jan-24	The Wealthy Barber: Pay yourself first (10% solution), compounding (TVM)	Ch.1		
MODULE Budgeting and Saving					
3	Mon-15-Jan-24	Map your spending habits, financial records, apps	Ch.2		1: Budget
4	Thu-18-Jan-24	Create a budget (personal cash flow statement)		Quiz 1	
MODULE Personal Income Taxes					
5	Mon-22-Jan-24	Personal income tax, deductions (EI, CPP), forms, filing, refunds (GST/HST credit, CAIP)	Ch.3		2: Salary, deductions and taxes
MODULE Banking and Financial Services					
6	Thu-25-Jan-24	Banking, GIC, HISA, TFSA	Ch.4	Quiz 2	
7	Mon-29-Jan-24	GUEST SPEAKER #1			
MODULE Debt and Consumer Credit					
8	Thu-1-Feb-24	Credit Scores, debt (revolving, instalment), servicing & affordability/capacity	Ch.5	Quiz 3	
9	Mon-5-Feb-24	TVM, interest rates, variable (prime rate) vs fixed, central bank, effective annual rate	Ch.6		3: Cash Flow Statement Jan (A)
10	Thu-8-Feb-24	Revolving (credit cards, LoC, overdraft) vs Instalment (student loans)	Ch.5, 6	Quiz 4	
MODULE Owning a Car					
11	Mon-12-Feb-24	Car buying, auto loan, insurance, gas, maintenance, resale	Ch.5, 6		4: Credit affordability & capacity
12	Thu-15-Feb-24	REVIEW CLASS	Ch.1-6	Quiz 5	
	Mon-19-Feb-24	Family Day			
	Thu-22-Feb-24	Break			
MODULE Buying vs. Renting Real Estate					
13	Mon-26-Feb-24	Buying a house MLS, realtors and fees, closing costs, mortgages	Ch.7		5: Buying & selling a car
14	Thu-29-Feb-24	Buy vs. rent decision	Ch.7	Quiz 6	
MODULE Investing in Stocks, Bonds and ETFs					
15	Mon-4-Mar-24	Stocks, risk and return	Ch.10, 11		6: Buying & selling a condo
16	Thu-7-Mar-24	Bonds, credit risk	Ch.12	Quiz 7	
17	Mon-11-Mar-24	Mutual funds and ETFs, portfolios, diversification	Ch.13		
18	Thu-14-Mar-24	Brokerage, indexing / passive investing, dollar cost averaging, trading costs, crypto	Ch.10, 13	Quiz 8	
MODULE Understanding Insurance					
19	Mon-18-Mar-24	Employment insurance, health, auto, home, life, travel	Ch.8, 9		7: Cash Flow Statement Feb (B)
20	Thu-21-Mar-24	GUEST SPEAKER #2		Quiz 9	
MODULE Planning for Retirement					
21	Mon-25-Mar-24	Pension plans, RRSP, OAS, CPP, inflation	Ch.14		8: Income needs in retirement
22	Thu-28-Mar-24	Retirement exercise	Ch.14	---	
	Mon-1-Apr-24	Easter			
MODULE Phishing, Consumer Scams, and Identity Theft					
23	Thu-4-Apr-24	Avoiding Phishing, Scams and Identify Theft	---	Quiz 10	



COM250 A02
Fundamentals of Marketing
Fall 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	M. W. 4:30 – 5:50 pm
Location	DTBA104
Instructor:	Dr. Linda Shi
Office:	BEC210
Office hours:	<p><i>Monday: 6PM-7PM</i> <i>Thursday: 1-2PM</i></p> <p>Office Hour on Zoom</p> <p>Join Zoom Meeting https://uvic.zoom.us/j/4487638193 MeetingID: 448763 8193 One tap mobile +17789072071,,4487638193# Canada +16475580588,,4487638193# Canada</p> <p>Dial by your location +1 778 907 2071 Canada +1 647 558 0588 Canada Meeting ID: 448 763 8193 Find your local number: https://uvic.zoom.us/u/kypuiqsxS</p>
Email:	Please catch me during or after class or office hour for a prompt response.

We acknowledge and respect the ləkʷəŋən peoples on whose traditional territory the university stand sand the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all it smembers.

Introduction:

Provide a personal introduction about yourself and your background. Write in the first person if you are comfortable with this. The purpose is to welcome students to the course and be available to students.

Required Case Pack:

Harvard Casepack available at URL: <https://hbsp.harvard.edu/import/1090627>

Professor: Linda Shi

Course: COM250 Fall 2023 Fundamentals of Marketing

For subsequent access to the materials, you will need to log in at <https://hbsp.harvard.edu/>.

For technical assistance, please contact the Harvard Business Publishing Tech Help line at 800 545-7685 or 617-783-7600; or email techhelp@hbsp.harvard.edu. Our business hours are 24 hours a day, 7 days a week.

Text:

Marketing for Marketing: An Introduction 6th Edition

Author(s): Armstrong, Gary | Kotler, Philip | Trifts, Valerie | Buchwitz, Lilly

Textbook ISBN-13: 9780134470528

Please note: any other editions, including 4th, 5th, 7th edition, are acceptable.

Online Text

To register for My Lab Marketing for Armstrong: Marketing: An Introduction, 7th Ed:

Go to <https://mlm.pearson.com/enrollment/shi28566>.

1. Sign in with your Pearson student account or create your account. For Instructors creating a Student account, do not use your instructor credentials.
2. Select any available access option, if asked.
 - o Enter a prepaid access code that came with your textbook or from the bookstore.
 - o Buy instant access using a credit card or PayPal.
 - o Select Get temporary access without payment for 14 days.
3. Select Go to my course.
4. Select My Lab Marketing for Armstrong: Marketing: An Introduction, 7th Ed from My Courses.

If you contact Pearson Support, give them the course ID: shi28566

Course Objectives and Description:

The class is intended to help you understand the concepts and skills of the marketing process. You can understand the related marketing concepts and tools, form your own marketing philosophy, and apply these to your career planning after completing this course.

You will be able to perform the following tasks after completing this course:

1. Understand marketing process;

2. Develop a marketing plan to introduce a new product or improve your current marketing practice;
3. Apply the marketing process model to your future work.

Course Format:

The course format is a combination of lectures, in-class discussions, cases, team presentations, and group project. Exam and group project are designed to help you review the concepts learned from this course and apply them into a real business environment.

Class Preparation

In preparation for each class please complete all required assigned readings and activities, as we will be applying, not reviewing, posted content. For each of our sessions, please ensure that:

- You have closed unnecessary programs on your computer as you may be sharing your screen for some activities
- You arrive early to ensure a prompt start time and give you a chance to ensure your audio/video is working. It also gives us a chance to chat and connect.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: youtube, google news and video. I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type	Due Date	Weight	Description
Class Participation	Individual	Participation	ongoing	10%	Based on attendance, group work, and in-class contribution
Mid-term Exam	Individual	Exam/Case	Oct. 18	20%	
Group Presentation	Group	Case Presentation	<u>See syllabus case discussion date</u>	20%	Students who choose to do group presentations do not need to take mid-term exam. Case presentation Grade substitutes mid-term grade
Group/Individual Project	Group/Individual	Hand-in Assignment and In-class presentation for group (note: If you write report individually, you don't need to do in-class presentation)	<u>Nov. 27, 29</u> <u>Group Project Presentation</u> <u>Dec. 6</u> <u>Report Submission</u>	30%	Students who choose Group Project path needs to do both presentation and report submission. If you choose to do individual report, you only need to turn in report and no need to present in class.
Final Exam	Individual	Exam	TBD	40%	

Total				100%	
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Note: There are several time slots available for group case presentations on a volunteering basis. The group members who contributed to case presentations don't need to take mid-term exam as your group presentation grades substitute your mid-term exam grade (20%). If you are interested in the group case presentation opportunities, please organize your group of **no more than five people** and **contact me ASAP or come to my office hour to register** for case presentation.

There will be no make up mid-term exam as group case presentation is an alternative to mid-term exam. If you cannot attend the mid-term exam, please organize a group to present a case in class.

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of **5%** for each day an assignment is late.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, is not permitted for assignment and final report. In this course for students who wish to use them. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI.

Attendance and Participation: Regular attendance is an expectation for Commerce classes. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Students with unexcused absences from more than 2 class sessions will have their grade reduced by 5%, in addition students with unexcused absences from more than 1/3 of the semester course (approximately 12 class hours) may not be permitted to write the final examination.

*unexcused absences = absences without appropriate documentation (self-declaration form). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found in the BrightSpace course site.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g. illness) which interfere with their academic obligations.

Contribution and Attendance (10%): Attending class regularly demonstrates your dedication to the course. Throughout the semester, your participation in class will be evaluated. Typically, you will be required to answer a few questions via Zoom during each week. Participation in class discussions will increase your contribution grade, and attendance will be tracked.

Mid-term Exam (20%)

A close book mid-term exam will be given to summarize the first half semester key learning objectives. More details will be announced before the mid-term exam.

Please note make up mid-term exam will NOT be arranged because you can choose to do case presentation which has a flexible schedule.

OPTIONAL Case Presentation (20%):

Students can organize team with no more than five people and volunteer to present the analysis of a selected case at the start of the class in which that case is to be discussed. Your presentation should be no more than 20 minutes in length including discussion time. Please upload your course slides to Case Presentation Registration Section on Brightspace before presentation and hand in your presentation slides with notes page to instructor in class. Make sure all group members' names and student IDs are provided on the first slide for grading purpose.

The students present cases do NOT need to participate in the mid-term exam as your case presentation grade substitutes your mid-term grade. If you are interested in this opportunity, please contact me ASAP to reserve the spot.

Case Presentation Format

While each case will require a different emphasis, as a broad guideline you should include the following topics in your presentation:

- Executive summary (1 slide)
- Key issues (1 slide)
- Situation Analysis (SWOT) (1 slide)
- Conclusions from analysis (1 slide)
- Alternative courses of action (1-2 slides)
- Discussion of alternatives (1 slide)
- Comparison of alternatives (1 slide)
- Recommendations (1 slide)
- Implementation (1 slide)
- Key learning (1 slide)

Grading

You will receive feedback from the class and your instructor on your presentation. In grading your assignment, I will ask the following questions:

- How carefully did you define the issues? Did you capture the essence of the case/topic?
- How thorough were your analyses?
- How relevant was your analyses to the problem at hand?
- Did you draw correct conclusions from your analyses?
- Did you systematically and thoroughly compare the alternatives?
- Were your recommendations appropriate?
- Were your implementation plans realistic?
- Did you see the bigger implications inherent in the case/topic?

For the case presentation, please note that, *unless otherwise stated* (there may be exceptions to this), you should assume that the information in the case is all that would be available to the decision maker at the time of the decision – i.e. conducting your own online research is unwarranted and may be distracting. For the topic presentation, please use book chapters as your guideline and feel free to search online to include any relevant information about the chosen company.

Group Project (30%):

Objectives

1. To conclude the course by applying the key tools and concepts you have learned.
2. To show that you have not just learned *about* the concepts in marketing principles, but that you can *work with* them in a real-world situation.
3. To show that you can exercise sound judgment in evaluating marketing opportunities/threats.

For the group project, you will research and analyze a brand/company and propose a new initiative for the brand/company. The new initiatives can be entering a new market/new customer segment, introducing a new product, or improving the brand's current practices to address certain issues, i.e., competitive threats. You are expected to submit a final course project report on the last day of class. You need to make sure to propose a new initiative that the company/brand has not yet conducted. Your report needs to add value to the company/brand existing practices.

Report

You are expected to follow the sequence of course map to complete your report. A good format for this would be:

Background & New Initiative

The company and its strategy

The new initiative you propose and rationale.

SWOT Analysis

Segmentation, Targeting and Positioning

4Ps analysis

Conclusions

Recommendations & Implementations of your new initiative(s)

Your grade of the final report will depend on:

- Did you exercise sound judgment in evaluating marketing opportunities/threats?
- How carefully did you define the issues/opportunities (i.e., new initiatives)? Did you capture the essence of the situation? Does the new initiative you propose make sense?
- Did you present your story in a compelling way?
- Did you develop an appropriate segmentation, targeting, and positioning strategy?
- Did you develop an actionable and meaningful marketing mix plan?
- Did you draw reasonable conclusions from your analysis?
- Were your recommendations appropriate?

A list of categories and brands will be provided. Each group can register a unique product category and choose one specific brand from the chosen category. Please note you cannot register the same category that has been chosen by the other group. The sign-up is on a first come first serve basis.

The written assignment is due in the last week of the semester, and should be no more than 12 pages, 11 pt., 1.5 spacing with default margins. Please submit it in Microsoft Word on Brightspace- Final Course Project Folder, using your last name and researched company as the filename, e.g. Shi_Linda_Costco.docx. Please make sure all group members put down names and student IDs on the cover page of your report.

Final Exam (40%): Final exam will be held at the end of the semester which will be an overall assessment of your understanding of marketing principles.

Attendance and Participation:

Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. **In addition, working in teams is a key component of your learning experience. Being an effective team member requires you to be present and engaged in the classroom environment.** Attendance is a critical component of everyone's academic success.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that "A" grades are normally achieved by a minority of students.**

Percentage Range	Grades	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a
73 – 76	B	5	
70 – 72	B-	4	

			good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Note that it is required that you pass the mid-term exam or case presentation to pass the course. In the case that you do not attain a passing grade in any such component, it will result in a final course grade of Incomplete (N), with the maximum possible percentage grade of 49.

Final course grades are official only after they have been approved by the Academic Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

	Topic	Type	Date	Description
	Class Introduction	Lecture	09/06 Wed	Syllabus
1.1	Introduction		09/11 Mon	Chap. 1: Marketing
1.2	Introduction		09/13 Wed	Chap. 1: Marketing in the post-pandemic world
2.1	SWOT: Marketing Environment	Lecture	09/18 Mon	Chap.4:Marketing Environment

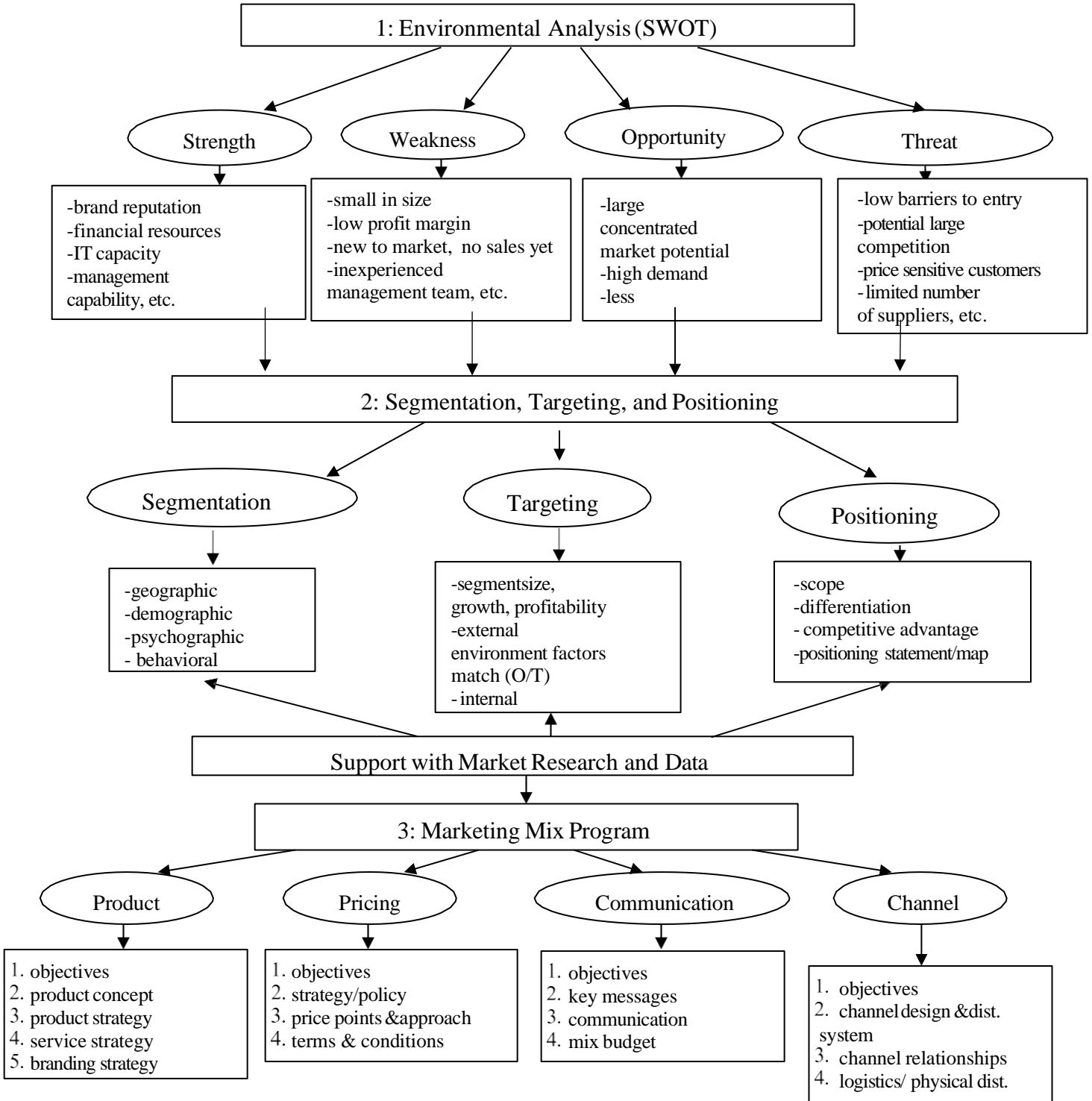
2.2	SWOT: Marketing Environment	Case	09/20 Wed	Case 1: Does Mattel's Iconic Barbie Doll Need a Makeover?
3.1	Consumer Behavior	Lecture	09/25 Mon	Chap. 6: Consumer Behavior
3.2	Consumer Behavior	Case	09/27 Wed	Case 2: Showrooming at Best Buy
4.1	Segmentation, Targeting & Positioning	Lecture	10/02 Mon	Chap. 7: Market Segmenting, Targeting, and Positioning
4.2	Segmentation, Targeting & Positioning	Case	10/04 Wed	Case 3: Graham's Pharmacy: Traditional Care, Modern Solutions
			10/9 Mon	No Class for Thanksgiving
4.2	Segmentation, Targeting & Positioning	Lecture	10/11 Wed	Chap. 7: Market Segmenting, Targeting, and Positioning
5.1	Product & Services	Lecture	10/16 Mon	Chap. 8: Products and Services
			10/18 Wed	Mid-term Exam
6	Branding	Lecture	10/23 Mon	Chap. 9: Branding
			10/25 Wed	GUESTLECTURE (TBD) Or Preparation for Final Project
7.1	Pricing	Lecture	10/30 Mon	Chap. 10: Pricing
7.2	Pricing	Case	11/1 Wed	Case 4: Nestle's Maggi: Pricing and Repositioning a Recalled Product
8.1	Channels	Lecture	11/6 Mon	Chap. 11 & 12: Marketing Channels & Retailing (II)
8.2	Channels & Retailing	Case	11/8 Wed	Case 5: Amazon Go: Venturing into Traditional Retail Chap. 12: Retailing and Wholesaling
			11/13 Mon	No Class for Reading Break
			11/15 Wed	No Class for Reading Break
9.1	Communication & Promotion	Lecture	11/20 Mon	Chap. 13: Communicating Customer Value

9.2	Communication & Promotion	Case	11/22 Wed	<i>Case 6: East Coast Lifestyle: Expanding A Regional Apparel Brand</i>
10.1	Final Group Project		11/27 Mon	Group project in-class presentation I
10.2	Final Group Project		11/29 Wed	Group project in-class presentation II
10.3	Final Group Project		12/04 Mon.	Group project in-class presentation III (Note: If you write individual report, you don't need to present in class.)
	Final Exam	Exam	TBD	

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

Appendix: Course Map Marketing

Principles Course Road Map



COM 302 (A01)

Legal Environment of Business

Fall 2023 Course Outline

Note: please regularly check your Brightspace site and subscribe to Brightspace Announcements for course updates and changes.

Course hours (PST)	Mondays and Thursdays at 1.00 p.m.
Location:	CLE C112
Instructor:	Mark D Bridge, LL.M, J.D., Barrister and Solicitor (British Columbia, England and Wales)
Office hours:	Please request in class or by e-mail: MarkBridgeCommerce@uvic.ca
Email:	MarkBridgeCommerce@uvic.ca

We acknowledge with respect the Lekwungen-speaking peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Introduction

Welcome to Legal Environment of Business. This course is very relevant to success in business.

Textbook

Contemporary Canadian Business Law, Principles and Cases, Willes, John A., Q.C., and Willes, John H., 12th e-book edition available from bookstore. Hardcopy editions by the same author from any source are also recommended and very good value. Please cite the 12th edition if you reference the textbook in coursework or project work..

Course Objective

From the *University of Victoria Calendar*:

"This course examines a number of legal principles that affect businesses and other organizations (e.g. nonprofit organizations) in our society. Course topics will include the law of tort, contract, business organizations and property. The course will focus on specialized areas such as the law of negligence, international business transactions, employment contracts, intellectual property and fiduciary obligations."

This course is primarily concerned with law as it affects business. While there is no self-contained law of business, the course will examine areas of law which impact business. Principal topics include, an introduction to the Anglo-Canadian system of law, the law of tort and negligence, including professionals' liability, the law of contract, the law of principal and agent, the law of employment. Within the above, we will consider the differences which result from the choice of legal form of business, whether it be sole proprietorship, partnership or limited partnership, corporation or trust. The respective liability of the principals of each form of business will also be considered.

Methodology

Instruction will principally consist of class lectures and discussion on each topic supported by questions posed to the class. It is essential that students read ahead in order to be able to follow the content and participate in practice questions and discussions. There will be a practice quiz with a worked solution approximately 12 October (one week prior to the mid-term quiz provisionally scheduled for 19 October 2023). Evaluation dates are subject to change. Please do not make plans to be absent from the classes scheduled before and after the provisional mid-term exam date.

Detailed chapter notes, power point slides, example handouts and other materials will be posted in advance in Brightspace.

As part of the participation in the course, teams of five students will be assigned a legal case to brief in written form according to a method provided. In October 2023, according to a schedule, the cases will be presented in class demonstrating understanding of "case brief" format used for judicial decisions. All necessary information will be provided. No research is required or should be undertaken in the exercise.

In November, teams of seven students will argue and judge a hypothetical, legal dispute in contract and agency. This will also take place in class, according to a schedule determined in mid-October.

Participation in other forms and by other means, such as contribution to discussion questions, assistance to class members, *et alia*, will be encouraged and acknowledged. Other evaluations include a final quiz to be scheduled in the December Exam Schedule period. As this date will not be known until after the Reading Break, please do not make travel plans for December prior to the date being confirmed by the University.

Equity, Diversity and Inclusion

Equity, diversity and inclusion are core values at the University of Victoria.

At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in- person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture.

We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Evaluation

Student grades in COM 302 will be determined on the basis of performance in the following assessments. See schedule of dates (pp. 15-17 below).

1. A case presentation exercise in teams of 5. Presentations involve 8-10 minutes spoken presentation in October (schedule to be determined).
20% of final mark
2. An in-person, mid-term quiz provisionally scheduled for 19 October 2023
25% of final mark
3. A contract-themed, legal dispute presentation in teams of 7 in the style of a Moot in-class during the last two weeks of November 2023 (schedule to be determined).
25% of final mark
4. A final examination during the December Examination Period
30% of final mark

Total: 100%

You must complete all graded components for this course unless you are excused. Failure to complete all components will result in a grade of N.

Additionally, there is an attendance requirement. See below, page 8.

Failure to meet the attendance requirement without the written permission of the Undergraduate Academic Director in respect of a major, extenuating circumstance will cause you to be excluded from the final examination with the result that your final grade is N (Incomplete, fail and GPA of 0).

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Case Presentation Exercise

In September, students will be invited to form groups of five students either themselves or on the basis of the instructor's random assignments. Each group will be given a trial or appeal court decision to present. Following a format which will be explained, each group must brief the case and then present the legal decision according to the format explained. Case presentations will take place in class according to the schedule in October 2023.

Case briefs summarise the essential elements of a case, including its procedural history (the path of the dispute through the legal system), the relevant facts, the legal issues for resolution by the court, the decision reached by the court and, most importantly, the reasons for decision.

In addition, groups are expected to comment upon the impact of the decision on business. By this is meant the impact the decision is likely to have on business or industry having particular regard to the functional areas of marketing, accounting, finance and human resources management. For example, what will be the implication on personnel practices, marketing policies, management information systems, financial strategies etc.

Group case presentations should take approximately 8-10 minutes and involve each member of the group in a speaking role. The written case brief must be submitted to the Brightspace dropbox before the presentation and indicate the part or parts contributed by each member.

This is a group project and each member of the group will receive the grade of the group.

Mooting Exercise - Court Simulation

Also, in September, students will be invited to form different groups of seven students themselves or on the basis of the instructor's random assignments. Two students in each group will assume the role of "Counsel for the Plaintiff", two students "Counsel for the Defendant", and the remaining members of the group will be a presiding judge, a time-keeping judge and an assistant judge.

Following a method to be explained, teams of counsel within each team will prepare their respective positions in the moot exercise for oral presentation in class. These presentations will take place in the final two weeks of the course in November.

Background information will be provided in mid-October. Counsel for the Plaintiff and Counsel for the Defendant must upload to Brightspace in a designated area, a copy of their moot brief document. The moot brief is a jointly-written brief of between 3 and 5 pages summarizing Counsels' position on the issues. A template for use will be provided in October.

Immediately prior to the commencement of each moot, written copy of each team's moot brief will be provided to opposing counsel and also provided to the judges for use during the moot presentation.

During the moot, the Judges will listen to the argument of each team of legal counsel and after having done so deliver a judgment on the issues. The Judges should deliver an immediate oral decision. Later, a written decision of between 3 and 5 pages will be jointly written by the judges. The written decision need not be identical with the oral decision. When written, the judges' decision will be uploaded to Brightspace.

The moot briefs and judges' written decisions will be graded using some or all of the following criteria: quality and merit of legal argument, creativity, organisation, clarity and appropriate citation of case or statute. To assist the judges in this task, there will be a "judges' coaching session" in November. For all participants, full information will be provided in class to explain effective strategies and techniques to use.

This is an individually assessed exercise.

Course Experience Survey

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be expected to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey; you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the course, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment Group Work

At the Gustavson School of Business team projects and assignments are an integral component to student learning.

It is an expectation that students contribute equitably to all team assignments. In order to receive an individual grade, individuals must participate in their team process to produce a team assignment.

Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility.

It is not acceptable for a team member to allow another team member to fulfill their work for them or for a team member to appropriate the work of the other team member(s) or prevent the other(s) from making their own contribution(s).

To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.

What To Do If There Is A Problem In Your Group

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Attendance and Participation

Regular attendance is an expectation of the Bachelor of Commerce Program. There is an attendance policy that will result in exclusion from the final examination if violated (see immediately below).

Attendance in every class is an expectation for COM 302. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Attendance Policy

This policy does not apply to absence due to illness, injury, personal affliction, family responsibilities, job interview or similar about which you advise me via e-mail prior to the cause or as soon as you are able: < MarkBridgeCommerce@uvic.ca >

In particular, if you or your family are not well, please stay at home and take care of yourselves until you recover. I will be more than happy to assist you with missed content.

This policy does apply to voluntary absences that have no justification other than personal choice to be absent.

In cases of absence of any six scheduled class times during the term (other than situations described above and other than class times where an in-class team presentation does not require your presence), you will be denied permission and excluded from writing the final examination unless you obtain the written permission of the Undergraduate Academic Director for a major, extenuating circumstance.

The consequence of missing the final examination is a course grade of N(incomplete, fail and GPA 0).

Use of Artificial Intelligence (AI)

Use of AI generated content, created or obtained directly or indirectly, is prohibited in the course.

In the United States, recent use of AI by trial lawyers who claimed not to know what it was, have resulted in judicial admonishment (ie public humiliation) and citation (ie referral) to disciplinary bodies for investigation and response.

Unattributed use of AI is a form of academic dishonesty for purposes of university policy. It is not permitted to use AI, whether attributed or not, in this course.

See the explanation at points c and d, page 12, below, for instruction on proper research, citation and attribution in a law course. Please ask for assistance if you are in any doubt. You will never be faulted for citing and attributing ideas to original (not artificial) sources of law, including any law contained within the adopted textbook for the course.

Missed Coursework, Team Work or Examinations

As explained, above, you must complete all graded components for this course unless you are excused. Failure to complete all components will result in a grade of N.

If you face unexpected circumstances that interfere with your academic obligations or success in the course, you must seek advice from a BCom Advisor or your instructor as soon as possible.

Grading Scale

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades.

Please note that “A” grades are usually achieved by a minority of students.

Percentage Range	Grades	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental.
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

University Calendar

Students are encouraged to read the regulations applicable to the course found in the *University of Victoria Calendar*.

Attendance

The University of Victoria Calendar states that "Students are expected to attend all lectures in each course for which they are enrolled". Regular attendance and preparation will enhance students' contribution and success in the course.

Assistance with your work

If a student intends to seek help or receives help from anyone on any coursework that will be evaluated in this course (ie help from another student, a tutor or anyone), **you must get my permission in advance to submit that work for evaluation.** Failure to do so will be treated in accordance with the university and faculty policies on plagiarism.

Academic Integrity, plagiarism and cheating

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- a. using work prepared by any form of artificial intelligence service, such as ChatGPT.
- b. using the exact words of a published or unpublished author without quotation marks and without referencing the source of the words.
- c. In law, a required reference must include the full name of the author, the full name of the work, the year of publication, the page cited with the full text quoted within quotation marks. If, as is not uncommon, words are omitted, then “elipses” must be used to show the omission of the words in the original text.
- d. For greater certainty, it is not sufficient to paraphrase original text and simply insert a citation of the type “ (Green, 2015) ”. Examples of correct citation will be provided in class. If in doubt, please ask before assuming that a form of citation acceptable in another context is sufficient in law.
- e. paraphrasing a published or unpublished author without referencing the source.
- f. Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- g. Paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g., personal communication, ideas from a verbal presentation) without referencing the source.
- h. Copying the answers of another student in any test, examination, or take-home assignment.
- i. Providing answers to another student in any test, examination, or take-home assignment.
- j. Impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- k. Stealing or mutilating library materials.
- l. Accessing a test or examination prior to the time and date of the sitting.
- m. Changing the name or answer(s) on a test after that test has been graded and returned.

- n. Submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism.

Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Group Projects and Group Work

Students should be aware that group projects are subject to the same rules regarding academic dishonesty. Because of the unique nature of group projects, all group members should exercise special care to ensure that the group project does not violate the policy on Academic Integrity. Should a violation occur, group members may be held jointly accountable unless the violation can be attributed to a specified individual or individuals.

Some courses, while not requiring group projects, encourage (or at least do not prohibit) students to together in groups before submitting, *inter alia*, individual assignments. Students are encouraged to discuss this issue as it relates to academic integrity with their instructor to avoid violating this policy.

For the Moot Exercise individual team members are encouraged to work with members of the class who are on teams other than their own. This collaboration is expected and is not a violation of academic integrity provided that the final result is the original work of the person submitting it for evaluation and assessment.

Class Time and Office Hours

COM 302 A01 meets on Mondays and Thursdays from 1.00 to 2.20 p.m.

Office hours are available by arrangement at a time that is mutually convenient to you.

You are very welcome to e-mail me for direct assistance at any time. My email is **MarkBridgeCommerce@uvic.ca**

Respect

Students with diverse learning styles and needs are welcome in this course. In particular, If you have a disability / health consideration that may require accommodations, please feel free to approach me or the [Centre for Accessible Learning \(CAL\)](#) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

Somewhere in this outline is an expression meaning “something for something”. If you are the first member of the class to locate the expression, you will win a very nice item of Gustavson “bling”. To claim the prize, go to Brightspace and send a class-wide e-mail to everyone in the class using the dropdown “Class List”. The subject line of the e-mail must read “I claim the COM 302 - A01 Course Outline prize”. In the body of the e-mail, type the following and enter the page and line number where you have located the expression meaning “something for something”. In particular, type the following message inserting the page and line number in place of the variable letters “X” and “Y”: “I located the winning expression in the Course Outline contest on page X at line Y, and I claim the Gustavson prize for section A01.” In addition to sending the e-mail to the whole class, forward your “sent” message to the course instructor at <MarkBridgeCommerce@uvic.ca> to show the time and day of your message. Good Luck to all. The winning class member will be the first person to send the class-wide e-mail as time- stamped by Brightspace and the prize will be awarded in a future class.

Reading, Topics List and Important Dates (dates approximate).

Dates subject to change	Topics and Activities
06 September	<i>Introduction to the course. Introduction to Canadian Law: Sources of Law of Law, Relevance to Business; Forms of Business Organisation: Types of Property: Real and Personal; Protection of Intellectual Property, Text Chapter 1, online materials and discussion.</i>
08 September	Instructions posted for 5-person Case Presentation Team Requests and 7-person Moot Team Requests via Brightspace.
08-15 September	5-person Case Presentation Team Requests due by noon on 15 September. In absence of a request, teams will be formed at random from the class.
11 September	(Continuing) <i>Introduction to Canadian Law: Sources of Law of Law, Relevance to Business; Forms of Business Organisation: Types of Property: Real and Personal; Protection of Intellectual Property, Text Chapter 1, online materials and discussion.</i>
16-22 September	7-person Moot Team Requests of 7 class members due by noon on 22 September. In absence of a request, teams will be formed at random from the class.
18 September	Case Presentation information and exercise instructions will be posted to Brightspace.
18 September	<i>Introduction to Canadian Law, as above (continued). Relevance of Environmental Law; International Law as applicable to domestic and international business; Law of Employment, Labour Law, Text Chapters 1.</i> Further optional reading: Chapters 19, 20, 34 and 35.
21 September	<i>Hierarchy of Law: Constitutional Law, Common Law and Statute; Judicial Process, Alternative Dispute Resolution, Text chapters 2 and 3.</i>
25 September	<i>Tort Law: Civil Liability compared to Criminal Liability; Intentional and unintentional tort; Defences and vitiating circumstances, tort remedies, use and protection using insurance, Text Chapters 4 and 5. Further optional reading Chapter 31.</i>

30	September	Moot Presentation Team List and Schedule will be posted to Brightspace.
05	October	<i>Tort Law (continued).</i>
09	October	Thanksgiving Day – no classes
12	October	<i>Tort Law (continued). Torts arising in Business; Professional Negligence: Duty of Care, Standard of Care and Causation, Text Chapters 4 and 5. Further optional reading Chapter 6.</i>
12	October	Practice Quiz posted to Brightspace with solution
13	October	Optional Mid-Term Review Class (location and time to be confirmed)
16	October	<i>Tort Law (continued).</i>
19	October	Mid-term Quiz (provisional date subject to change)
23-26	October	In Class Presentations according to team schedule on Brightspace
30	October	<i>Contract Law: Elements of Contract and Proof; Defences and vitiating circumstances; Chapters 7, 8, 9 and 11.</i>
02	November	<i>Contract Law(continued) Elements of Contract and Proof; Defences and vitiating circumstances; Chapters 7, 8, 9 and 11.</i>
06	November	<i>Contract Law (continued): Elements of Contract and Proof; Defences and vitiating circumstances; presence or absence of quid pro quo; Chapters 7, 8, 9 and 11.</i>
13-15	November	Reading Break - No Class
16	November	<i>Agency: Appointment and use in Contract, Text Chapter 15, Legal and Equitable Remedies, Quantum Meruit and Promissory Estoppel, Text Chapters 8 and 14.</i>
20-30	November	Moot Exercise presentations according to team schedule on Brightspace
04	December	Optional Final Exam Review Class (location and time to be confirmed)
TBA	December	Final Examination (date to be confirmed by University)

Note: Time permitting, the importance of the following topics will be discussed when arising but will not be examined:

Sale of Goods, Consumer Protection Law, Business Organisation: Creation, Liability of Officers, Shareholder Limited Liability and Shareholders' Agreements Banking, Secured Transactions, Negotiable Instruments: Promissory Notes, Cheques and Bills of Exchange. Intellectual Property: Creation and Enforcement, Patents, Trademarks, Copyright, Industrial Design and Contractual protection of intellectual property.

Mark Bridge
28 August 2023
Three typographical mistakes corrected 3 September 2023



COM 315 (A01-A05)

Financial Accounting

Fall 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.		
Course hours(PST)	A01 M/W 8:30 – 9:50 AM DSB C116 CRN 10671 A02 M/W 10:00 – 11:20 AM DSB C112 CRN 10672	A03 M/W 11:30 am – 12:50 PM DSB C122 CRN 10673 A04 M/W 2:30 – 3:50 PM DSB C116 CRN 10674 A05 M/W 4:30-5:50 PM DSB C122 CRN 10675
Instructor:	Alison Parker	Douglas Stuart
Email:	alisonjparker@uvic.ca	dstuart@uvic.ca
Office #:	BEC 216	BEC 152
Office Hours:	Mondays, 1:00pm – 2:00pm, or by appointment, including Zoom if requested	Tuesdays and Thursdays, 1:00pm – 2:00pm, or by appointment, including Zoom if requested

We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Texts and Resources:

Required: e-text (or loose-leaf text). WileyPLUS is not required for COM 315; it accompanies the e-text and can be used as an additional study aid. New textbooks should include WileyPLUS as part of the purchase price.

Financial Accounting, Tools for Business Decision-Making, 9th Cdn. Ed. *with WileyPLUS*, Kimmel, et al.). (**N.B.** a previous edition is not suitable – the questions and accounting information have changed)

The text is in the form of an e-text or a loose-leaf textbook– the Wiley access code for the e-text and access to the Wiley website for this course is available through the Uvic Bookstore <https://www.uvicbookstore.ca/text/>. Look for Com 315 and your section and select the e-text. You will need to visit the bookstore to get the loose-leaf version (which also has e-Text and WileyPLUS access).

TRIAL VERSION: A free, two-week trial-version of the text and access to the WileyPLUS website is available.

Calculator: A basic function calculator is required for COM 315, however, you may want to purchase a financial calculator as it may be useful in other BCom courses. A Texas Instrument BA II+ financial calculator or a Sharp Financial EL 738FB are good options.

Course Objectives and Description:

This course introduces financial accounting concepts in a manner that prepares managers to use information presented in Statements of Financial Position, Statements of Income, and Statements of Cash Flow for making relevant financial decisions in a global environment. In addition to a review of the above financial statements, topics include understanding financial statement analysis. The course objectives are to:

1. Develop the ability to recognize, create and examine basic financial statements; the statement of comprehensive income (income statement), the statement of changes in equity, the statement of financial position (balance sheet), and the statement of cash flows.
2. Discuss the issues and judgments used in the identification, measurement, recording, and reporting of financial statement information.
3. Use the tools presented in the course to derive information from financial statements for use in developing potential solutions to business issues.
4. Enhance both oral and written communication skills through class discussion of theory and practice problems.

Course Format:

The course consists of a combination of lectures and class discussions. Lectures supplement course materials to reinforce key course points and the use of problems and/or case studies will allow application of the theory and content. Students are expected to complete all assigned readings, cases and/or other content posted and to be prepared for full and active participation in the class discussion. Developing an understanding of the material requires practice.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology

We use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: Zoom Meetings (if used for office hours) and WileyPLUS (elective component of the e-text). I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. Personal information is required by the service. For WileyPLUS, the privacy policy and the terms of use list the personal information stored outside of Canada and are available at https://www.wileyplus.com/WileyCDA/privacy_policy.html. I encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to your instructor within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Classroom Use of Technology:

Laptops and tablets will be allowed for use in Com 315 for the purpose of taking notes and for in-class exercises. All other uses are distracting to your learning, the learning of others, and to the instructor. The use of laptops or tablets for any purpose other than taking notes and completing in class exercises is strictly prohibited.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title	Ind. or Group	Type:	Due Date	Weight/ % of grade	Description
COM 315 "Get to know you" Quiz	Ind.	Online Quiz	Friday, Sept. 15, 8:00PM	1%	Brightspace quiz
COM 315 Company Report Project	Group	Hand-in Assignment	Sunday, Nov. 19, 8:00PM	10%	Posted on Brightspace (Submitted through Assignmentson Brightspace)
COM 315 Term Assignment Part 1 6.2% Part 2 8.8%	Ind.	Hand-in Assignment	Part 1: Sunday, Oct 15, 8:00PM Part 2: Sunday, Nov 5, 8:00PM	15%	Posted on Brightspace (Submitted through Assignmentson Brightspace)
COM 315 Mid-term Examination	Ind.	Examination	Friday, Oct. 27	29%	2-hour in-person exam
COM 315 Final Examination	Ind.	Examination	UVic Registrar's exam schedule	45%	3-hour in-person exam – comprehensive
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that we may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Note: A minimum grade of C+ in COM 315 is needed for entry into the 4th year course COM 425.
Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g. Illness, accident or family affliction) which interfere with their academic obligations. Your instructor must be advised immediately regarding any missed assignment submissions or absences from the midterm/final

exam, and acceptable documentation must be provided to the BCom office as soon as possible. All graded components must be completed and submitted or you may receive a final grade of **N**.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty as outlined in the assignment materials. In some cases, it may not be possible to accept late materials and the result will be a 0 grade for that item. When a corrupted file is uploaded to a Brightspace Assignment drop box, late penalties will be applied and the assignment may have a 0 grade applied. Ensure you are using the required programs to avoid file corruption.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, is not permitted in this course.

Attendance and Participation:

Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

We understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, we encourage you to stay home when you are sick, taking care of yourself and protecting others. You may also choose to miss class for a job interview, home responsibilities, or a host of other reasons. If, however, you miss more than **4** classes for any reason, you will receive a **1%** deduction from your final course grade for every additional class missed, unless you complete a make-up assignment for each additional class missed. These assignments are designed to ensure you are keeping up with the material and enable successful course completion. It is your responsibility to ask me for a make-up assignment within 4 calendar days of the missed class. If you miss more than **8** classes and do not complete the required make up assignments, this will result in a final course grade of Incomplete (N), with the maximum possible percentage grade of 49.

In addition, you will be denied permission to write the final exam if you miss more than 8 classes.

Exceptions to these attendance policies will only be considered for major extenuating circumstances, with permission from the Undergraduate Academic Director.

Class norms for participation include:

- Attendance (on time) in class
- Remaining in class for the entire class period (unless pre-arranged or an urgent situation)
- Ensuring your **name card** is clearly displayed while in class
- **Active** participation in class discussions by adding new information (not repeating other comments), asking and answering questions, constructive disagreement with other student's viewpoints in an environment of mutual respect.
- Not distracting the class.
- Demonstrating professional skills such as sound judgment and effective communication (during class/office hours/email)
- Exhibiting ethical behaviour, professionalism and integrity
- Discussing with the instructor, in advance, any exceptions to these norms.

If, for some reason, you are not prepared for the class that day, please let your instructor know before the start of class.

Company Report Project: The Company Report Project is a **group** project. A more detailed description of the project and the requirements will be posted on Brightspace and discussed in class. The CPA Canada website has a publication entitled *Reading Financial Statements – what do I need to know?* You might find this reference useful when looking at the annual report information. This document will be shared on BrightSpace during the term.

Term Assignment: Based on Chapters 1-4 (and a bit of Chapter 5), the term assignment covers the steps of analyzing and recording transactions through to preparation of financial statements (Statement of Income, Statement of Changes in Equity, and Statement of Financial Position,) in a two-part assignment. A more detailed description will be posted on Brightspace and will be discussed in class.

Mid-term Exam: The mid-term will be 2 hours in length and may include multiple choice questions, theory questions and specific problems. It will be written at a common time for all sections of COM 315 – Financial Accounting.

Final Exam: The final exam will be held during the regularly scheduled exam period (in December). The Registrar's Office posts the exam schedule later in the semester. It will be 3 hours in length and may include a combination of multiple-choice questions, theory questions and specific problems/cases from the full course materials. It will be written at a common time for all sections of COM 315 – Financial Accounting.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that "A" grades are normally achieved by a minority of students.**

Percentage Range	Grades	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

"N" (incomplete) grades: All graded components must be completed, or you will receive a failing grade of N (grade point value of 0).

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation.
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph, or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g., personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

Week	Topic	Date	Description/Readings
1	Course Introduction What is Financial Accounting? Forms of Business Organizations The Accounting Framework	Mon., Sept. 11 and Wed., Sept. 13	Ch 1 <i>Purpose and Use of Financial Statements</i> (Read the full chapter, but we will come back to financial statements in week 2) Ch 2 <i>A Further Look at Financial Statements</i> pp. 2-21 to 2-27 <u>Submit answers through Brightspace Quiz: "Get to Know You", due Friday, Sept. 15, 8:00PM</u>

Week	Topic	Date	Description/Readings
2	Income Statement – Multi-Step (only) and Some Basic Ratios Statement of Changes in Equity Statement of Financial Position and Some Basic Ratios	Mon., Sept. 18 and Wed., Sept. 20	Ch 5 <i>Merchandising Operations</i> pp. 5-23 to 5-28 including basic ratios (N.B. ONLY the Multi-Step Income Statement will be used in this course so do not refer to the example on page 5-22) <i>Statement of Changes in Equity</i> in Ch 1 pp.1-19 to 1-20 <i>The Classified Statement of Financial Position</i> in Ch 2 pp. 2-1 to 2-13 N.B. There are posted “sample” financial statements in the Unit 2 folder, which follow the expected formatting for assessments.
3	Accounting Process	Mon., Sept. 25 and Wed., Sept. 27	Ch 3 <i>Accounting Information System</i> Term Assignment Part 1 will be posted this week in the BS module “Term Assignment”, due in BS Assignment Drop Box at 8:00PM Sun., Oct. 15.
4	Accruals and Adjusting Entries	NO CLASS Mon., Oct. 2 (Stat) Wed., Oct. 4	Ch 4 <i>Accruals</i>
5	Accruals and Adjusting Entries (Cont.)	NO CLASS Mon. Oct. 9(Stat) Class resumes Wed., Oct 11	Ch 4 <i>Accruals</i> <u>Term Assignment Part 1 due Sunday, Oct. 15, 8:00PM (use the BS Assignment Drop Box)</u>
6	Internal Control and Cash Non-Strategic and Strategic Investments	Mon., Oct. 16 and Thurs., Oct. 18 (NB the Wednesday and Thursday schedules have been shifted this week)	Ch 7 <i>Internal Control and Cash</i> Ch 12 <i>Reporting & Analyzing Investments</i> pp. 12-1 to 12-5
7	Merchandising Operations COGS Three Inventory Methods	Mon., Oct. 23 and Wed., Oct. 25	Ch 5 <i>Merchandising Operations</i> pp.5-1 to 5-21 Ch 6 <i>Reporting & Analyzing Inventory</i> pp. 6-1 to 6-25 <u>Mid-term Exam held on Friday, Oct. 27. Time and location TBA</u>

Week	Topic	Date	Description/Readings
8	Receivables	Mon., Oct. 30 and Wed., Nov. 1	Ch 8 <i>Reporting & Analyzing Receivables</i> pp. 8-1 to 8-23 <u>Term Assignment Part 2 due Sunday, Nov. 5, 8:00PM (use the BS Assignment Drop Box)</u>
9	Long Term Assets	Mon., Nov. 6 and Wed., Nov. 8	Ch 9 <i>Reporting and Analyzing Long Lived Assets</i> pp. 9-1 to 9-6; pp. 9-8 to 9-17; pp. 9-22 to 9-31; pp. 9-33 to 9-36 (OMIT pp. 9-6 to 9-7 Leases, pp. 9-17 to 9-22 Other issues)
10	READING BREAK	NO COM 315 CLASSES – READING BREAK	<u>Company Report due Sunday, Nov. 19, 8:00PM (use the BS Assignment Drop Box)</u>
11	Liabilities & Shareholders' Equity	Mon., Nov. 20 and Wed., Nov. 22	Ch 10 <i>Reporting and Analyzing Liabilities</i> pp. 10-1 to 10-3; pp. 10-9 to 10-10 (OMIT pp. 10-4 to 10-9 Sales Taxes or Payroll; and the rest of the chapter and appendix following p. 10-10) Ch 11 <i>Reporting & Analyzing Shareholders' Equity</i> pp. 11-1 to 11-28 (OMIT pp. 11-29 to 11-38 Measuring Corporate Performance)
12	Shareholders' Equity (Cont.) & Statement of Cash Flows	Mon., Nov. 27 and Wed., Nov. 29	Ch 11 <i>Reporting & Analyzing Shareholders' continued.</i> Ch 13 <i>Statement of Cash Flows</i> - pp. 13-1 to 13-35 (Omit Appendix 13A)
13	Statement of Cash Flows (Cont.)	Mon., Dec. 4 Cohort 3-5 CLASS TIME CHANGE. *New times below: Cohort 3: 12:30-1:50PM Cohort 4: 2:00-3:20PM Cohort 5: 3:30-4:50PM	Ch 13 – <i>Statement of Cash Flows</i> continued.

Student Support:

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach your instructor and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals, and arrange appropriate accommodations. The soon you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



COM 317 (A01) **Managerial Accounting**

Fall 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	6:30 – 9:20 pm PST Thursdays online
Location	Online
Instructor:	Jennifer Reed, MEd, CPA, CA
Office:	Zoom Link
Office hours:	ZOOM Hours: By appointment over ZOOM
Email:	jreed@uvic.ca

We acknowledge and respect the lək̓'wəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Introduction:

My name is Jennifer Reed and I am excited to be your instructor this term. I graduated from the University of Victoria with a Bachelor of Science in Economics and after completing the Chartered Accountancy (CA) program, I obtained my Chartered Accountant (CA) designation in 2006. I recently completed a Master of Education degree with a focus on curriculum and instruction through Simon Fraser University in 2020.

I currently work as a Director for CPA Canada where my team is responsible for the design and delivery of accurate and high-quality Preparatory course and Professional Education Program (PEP) module materials designed to prepare candidates for successful careers as CPAs in Canada.

Prior to joining CPA Canada, I worked as an audit manager with KPMG working on a variety of both for-profit and not-for-profit audit clients. I also worked for three years as the Director of Finance for a local municipality, and as a Director for the legacy Chartered Accountancy School of Business in Western Canada.

My true passion is teaching, and I have taught financial accounting, audit and assurance and management accounting to students since 2010. I recognize that some of you may be taking this class out of interest, while others may be in attendance because of a program requirement. Regardless of your reason for being here, I hope that you come away from this course with a better understanding of the role that management accounting plays in the professional world.

Please do not hesitate to reach out to me for any questions or clarification as we progress through the term!

Texts and Resources:

Garrison, Libby, Webb, Noreen & Brewer; **Managerial Accounting**; Twelfth Canadian Edition with CONNECT; McGraw-Hill Ryerson, 2021, ISBN: 978-1-26-019327-5

Please note: Connect is a requirement of this course.

If you choose to purchase a used copy of the text, please ensure that it is the 12th edition, and you will need to purchase the access code for Connect separately. Please check with the bookstore.

Course Objectives and Description:

This course is an introduction to the fundamental concepts of management accounting. It complements the concepts covered in COM 202 Financial Accounting, by focusing on the accounting functions internal to the organization. Management Accounting is concerned with the analysis and accounting for costs, management planning, controlling and decision-making. The course provides exposure to cost behaviour, variance analysis, short-run choice decisions and budgeting, as well as activity-based costing and activity-based management.

The course learning objectives include:

- Recognizing the importance of management accounting in an organization and how it is used within the context of the other functions of the company.
- Identifying the characteristics and behaviour of costs and the decisions that influence these costs.
- Using cost/volume/profit analysis, including calculating the break-even point and potential profit in a given situation.
- Identifying and applying different pricing methods.
- Recognizing where to use the various cost accounting systems.
- Calculating product costs and analyzing decisions that influence these costs and interpreting them in a decision-making context.
- Recognizing the importance of activity-based costing in the evaluation of organizational performance.
- Applying concepts of budgeting and cash management.
- Identifying responsibility centers and segment reporting.
- Determining and interpreting divisional performance.
- Using the “balanced scorecard” for decision-making and discussing different performance indicators.

Course Format:

This course will be delivered online using Zoom. It is recommended that you read the chapter as well as attend our weekly classes. Each class will be used to review the chapter content and work on problems related to the chapter being covered.

The principal method of instruction will include discussion of any questions arising from the relevant management accounting theory, combined with the analysis and discussion of problems worked on during class. Developing a full understanding of the material is enhanced by the completion of numerous problems and students are strongly encouraged to do as many as possible. Solutions will be posted on Brightspace.

The assignments will be completed using the McGraw Hill Connect platform. The assignments will provide questions, solutions and feedback which will allow students to practice concepts and technical aspects to aid in their learning.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: Zoom, McGraw Hill Connect. I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at:

<https://zoom.us/privacy>

<https://www.mheducation.com/privacy.html>

I encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type	Due Date PST	Weight / % of grade	Description
Participation/ Contribution	Individual	Online	Ongoing	5%	Based on assigned reflections, an end of term self-assessment and in-class participation.
Connect Assignments	Individual	Assignments	As per the course schedule	35%	Five assignments will be administered throughout the course. They will cover the current week or prior weeks' content. Each assignment is worth 7%
Midterm	Individual	Online Timed Exam	Thursday, October 26 th at 6:30 pm PST	25%	Combined short answer and MCQ exam to be completed in 120 minutes via Brightspace
Final	Individual	Online Timed Exam	Per final exam schedule	35%	Combined short answer and MCQ exam to be completed in 120 minutes via Brightspace. Exam written in person
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Description of evaluation standards for evaluation elements.

Attendance and Participation: The University of Victoria Calendar states: "Students are expected to attend all classes in which they are enrolled." Attending and participating in class is an important part of the learning process in this course. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to

material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course.

The assessment of participation will be based on assigned reflections, an end of term self-assessment and in-class participation.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of 50% for each day an assignment is late. An assignment is considered late if it is submitted more than 30 minutes after the stated deadline.

This penalty does not apply to midterm exams, which are not accepted late for any reason whatsoever. If a student exceeds the time limit specified for a midterm exam beyond the 1-minute grace period, a grade of zero will automatically be assigned.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g. illness) which interfere with their academic obligations.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. In this course, the use of AI tools including ChatGPT is not permitted on take-home assignments or assessments.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grade s	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

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- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
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Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

IMPORTANT: Subject to change- refer to Brightspace weekly content

Week	Date	Topics	Details
1	Thursday, September 7	Managerial Accounting and the Business Environment	Read: Chapter 1
2	Thursday, September 14	Cost Terms, Concepts and Classifications	Read: Chapter 2
3	Thursday, September 21	Cost Behaviour: Analysis and Use	Read: Chapter 3 (exclude Appendix)
		Connect Assignment 1 worth 7%	Available until Sunday, September 24 th at 11:55 PM (PDT)
4	Thursday, September 28	Cost-Volume-Profit Relationships	Read: Chapter 4 (exclude Appendix)
		Reflection #1	Due Sunday, October 1 st at 11:55 PM Pacific
5	Thursday, October 5	Systems Design: Job-Order Costing	Read: Chapter 5
		Connect Assignment 2 worth 7%	Available until Sunday, October 8 th at 11:55 PM (PDT)
6	Thursday, October 12	Activity Based Costing: A Tool to Aid Decision Making	Read: Chapter 7 (exclude Appendix)
		Connect Assignment 3 worth 7%	Available until Sunday, October 15 th at 11:55 PM (PDT)
7	Thursday, October 19	Midterm Review and catch-up week	
8	Thursday, October 26	Midterm	Course to date cumulative mid-term. Start time is 6:30 pm Pacific. Estimated time of 120 minutes.
9	Thursday, November 2	Variable Costing: A Tool to Aid Decision Making	Read: Chapter 8 (exclude Appendix)
		Reflection #2	Due Sunday, November 5 th at 11:55 PM Pacific
10	Thursday, November 9	Budgeting	Read: Chapter 9 (exclude Appendix)
11	Thursday, November 16	Reporting for Control	Read: Chapter 11 (exclude Appendix)
		Connect Assignment 4 worth 7%	Available until Sunday, November 19 th at 11:55 PM (PDT)
12	Thursday, November 23	Relevant Costs for Decision Making	Read: Chapter 12 (exclude Appendix)
		Reflection #3	Due Sunday, November 26 th at 11:55 PM Pacific
13	Thursday, November 30	Capital Budgeting Decisions	Read: Chapter 13 (exclude Appendix)
		Connect Assignment 5 worth 7%	Available until Sunday, December 3 rd at 11:55 PM (PDT)

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



COM 321

Leading People and Organizations (LPO) 1 Fall

2023 Course Outline

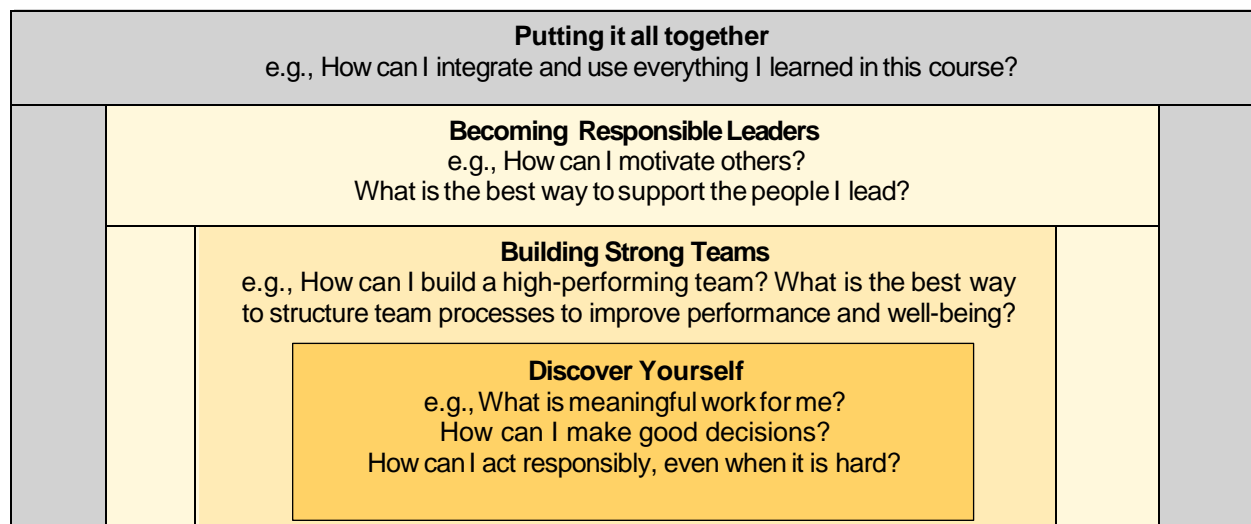
Course days	Mondays & Wednesdays		
	Cohort 2	8:30-9:50	DSB 112
	Cohort 3	10-11:20	DSB 122
	Cohort 1	11:30-12:50	DSB 116
	Cohort 4	2:30-3:50pm	DSB 116
	Cohort 5	4:30-5:50pm	DSB 122

Instructors	Stacey Fitzsimmons	Clemens Rettich
	sfitzsim@uvic.ca	clemensrettich@uvic.ca

Office hours By appointment or scheduled as needed.

Welcome! This course (LPO 1) and LPO 2 are designed to help you build skills as responsible business leaders who can lead change for a better world throughout your careers. In this course (LPO1), you learn about person-to-person interactions (making difficult decisions, building strong teams, becoming responsible leaders), while in the spring, in LPO 2, you learn about organizational processes for managing people (recruitment, performance management, organizational culture and change, etc.). By the end of the fall semester, you should be able to:

1. Understand yourself and your behavior to enable professional growth.
2. Design and assess high-performing teams.
3. Analyze and navigate organizational life
4. Use your understanding of human behaviour to improve outcomes in organizations.
5. Contribute insights, knowledge and peer supports to improve your cohort's learning.



We acknowledge and respect the lək'wəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

How will you be evaluated? Details on Brightspace and in class, due dates in schedule ahead.

Title	Description	Weight % of grade
Final exam	This cumulative final exam assesses <i>learning objectives #2, 3, and 4.</i>	45%
Team case analysis	Analyze a case of your choice, based on a real situation (yours, friends/family, the news). This includes both a project grade (25%) and an individual component based on each person's contributions to the team (5%), as informed by peer evaluations and our meetings with teams. You'll have the chance to present your case prior to submitting. The presentation is not graded so you can use it to request feedback and improve your presentation skills. <i>This assignment helps you achieve learning objectives #2, 3 and 4.</i>	30%
Individual Portfolio	Collect a 'portfolio' of two deliverables: 1. A sequential set of 4 Concept Maps developed through the semester, and a short reflection explaining them. 2. Evidence of participation and contributions to your own learning, and a short reflection explaining the evidence. <i>This assignment helps you achieve learning objectives #1, and 5.</i>	25%

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that we may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

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Percentage Range	Grades	Grade Points	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

"N" (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0). Final course grades are official only after they have been approved by the Academic Director and may be subject to change up until that point. In Bachelor of Commerce courses at the 100-, 200- and 300-level, we generally anticipate final grades that are distributed in line with the following:

Grade Range	Proportion Of Class	Grade Range	Proportion Of Class
A's	25-40%	C	10-25%
B's	30-50%	D, F	0-15%

Group Work: At the Gustavson School of Business team work is used to enhance your skill in working collaboratively. We expect you to contribute equitably to all team assignments. That means being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. In order to receive individual grades, each person must participate in their team process to produce a team assignment. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.

What to do if there is a problem in your group: If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of 10% for each day an assignment is late.

Use of Artificial Intelligence (AI): In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, is permitted to support written assignments, research, and general understanding, for students who wish to use them. Our expectation is that you are both careful (being aware of biases, errors, and AI 'hallucinations' inherent in the technology) and transparent about the use of these tools (as set out next). To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI.

Attendance and Participation: Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning experience in this course. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

In this course, participation forms part of the individual portfolio grade (25%).

While attendance is a pre-requisite for participation, we understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, we encourage you to stay home when you are sick, taking care of yourself and protecting others. You may also choose to miss class for a job interview, home responsibilities, or a host of other reasons. To accommodate the possibility of such occasional absences during the term, you can drop the four lowest marks from the assessment of your participation.

Although there is an accommodation for up to four absences in the term, we want to emphasize that your presence in class positively affects your intrinsic learning, as well as that of your teammates, and contributes greatly to the overall learning environment. Therefore, your participation grade will be impacted if you have more than four absences in the term. If you miss more than four classes, you may request a make-up assignment from us for each additional absence. It is your responsibility to ask us for a make-up assignment within four calendar days of the missed class. In addition, you will be denied permission to write the final exam if you miss more than eight classes.

Exceptions to these attendance policies will only be considered for major extenuating circumstances, with permission from the Undergraduate Academic Director.

Missed Coursework or Assessments: You are responsible to proactively seek advice from us when facing unexpected circumstances (e.g., illness) which interfere with your academic obligations. In cases of missing an exam or course assessment deadline etc., we expect you to reach out to us in a timely manner (preferably before the exam or course assessment deadline or soon after).

Readings: We keep your costs to a minimum by avoiding a textbook and sourcing all possible materials through the library. Please check Brightspace regularly for updates, course changes and links to readings.

Equity, Diversity and Inclusion: Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, we intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let us know if we can do better to support your rights in our classroom. We will also do my best to listen and respond compassionately if you want to share how we can be better allies.

Educational Technology: We use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: ITP metrics (<https://www.itpmetrics.com/privacy>), and Harvard Business Publishing Education <https://hbsp.harvard.edu/privacy-policy>. We will make you aware if this list changes. We use these technologies to enhance your educational experience at UVic. Personal information is required by the service. Their privacy policies and terms of use are available at the links above.

If you are not comfortable with your personal information being stored outside of Canada, please speak to one of us within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Course Experience Survey: We (Stacey and Clemens) seriously consider your feedback, as does the Gustavson School of Business. As with all of our courses, you'll be asked to complete a confidential course experience survey (CES) about your learning experience in this class. We use your feedback every year to adjust and improve the course. The School also uses your feedback to make improvements for students in the future.

Given its importance, we will offer class time for completing the online survey. Toward the end of the term, you'll receive an email inviting you to complete your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Academic Integrity: As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. We will immediately refer all cases of cheating or plagiarism, and any variations thereof, to the Associate Dean of Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

All instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments. The course materials used in this course (electronic and paper) are the intellectual property of the instructor. Students cannot share our materials without our consent and cannot sell or profit from our intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Centre for Accessible Learning (CAL): Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach us and/or CAL as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

COM 321 Class Schedule

Date	Topic	By the end of class, you should be able to answer these questions	Instructor
MODULE 1: DISCOVER YOURSELF			
Mon Sept 11 Class #1	Intro to LPO1	<ul style="list-style-type: none"> What and how will you be learning in LPO1 this semester? What evidence is there for the importance of soft skills? How is self-knowledge related to performance? 	Stacey & Clemens
Wed Sept 13 Class #2	Do individual differences matter?	<ul style="list-style-type: none"> When and how do individual differences matter ... or not? What are the most effective strategies to manage and leverage individual differences? 	Stacey
Mon Sept 18 Class #3	Meaning & purpose	<ul style="list-style-type: none"> When, why, and how should you pursue purpose in your work? What's the evidence supporting or dismissing its value? 	Stacey
Wed Sept 20 Class #4	Making good decisions	<ul style="list-style-type: none"> Name and explain how biases influence decisions. What are the benefits/drawbacks of human and algorithmic decision-making? What types of situations fit each type of decision-making? What strategies can we use to reduce biases in decision-making? Analyze their efficacy and how they work. 	Stacey
Fri Sept 22	Team case proposal due		
Mon Sept 25 Class #5	Team Meetings	<ul style="list-style-type: none"> Short team meetings with your instructor about your chosen case Please go to the normal classroom for an activity during the rest of class time, other than your scheduled meeting time with your Professor. 	Stacey in BEC 209 Clemens in DSB 124
Wed Sept 27 Class #6	Ethics & responsibility	<ul style="list-style-type: none"> What are the different ways to understand ethical dilemmas? How can I act responsibly, even when it's hard? What are the benefits and drawbacks of different approaches? 	Stacey
Mon 30 th Oct 2	No class: University closed for National Day for Truth and Reconciliation (Sept 30 th)		
MODULE 2: BUILDING STRONG TEAMS			
Wed Oct 4 Class #7	Diversity and team performance: How are they related?	<ul style="list-style-type: none"> What is the evidence linking diversity to performance? How can workplace barriers impede diversity? What are evidence-based methods that can improve performance within diverse teams? 	Stacey
Mon Oct 9th	No Class – Happy Thanksgiving!		
Wed Oct 11 Class #8	Teams in Organizations	<ul style="list-style-type: none"> What is the role of teams in organizations? What are the different types of teams? In what types of environments do teams perform best? What are the characteristics of high-performing teams? What are the pros and cons of virtual teams? How do virtual teams function effectively? 	Clemens
Mon Oct 16 Class #9	Organizational Communication	<ul style="list-style-type: none"> What constitutes the elements of organizational communication? What are the impacts of poor communication in organizations? How is organizational communication related to systems thinking? What are the elements to consider when assessing or improving communication within an organization? 	Clemens
Thursday Oct 19 negotiating Class #10	Negotiation	<ul style="list-style-type: none"> What are the pros and cons of distributive versus integrative approaches to negotiating? When is each appropriate? Recommend strategies that are more likely to lead to better outcomes for each style. What is an effective way to plan for a negotiation (including the issues, positions, interests and BATNA of each negotiation partner)? 	Clemens
Mon Oct 23 Class #11	Managing conflict	<ul style="list-style-type: none"> What types of conflict do teams experience? How does conflict affect team performance? What strategies are most effective at managing conflict in teams? In what situations do the strategies each work best? 	Clemens
Wed Oct 25 Class #12	Feedback	<ul style="list-style-type: none"> What is feedback? What are the best ways to plan and deliver constructive, useful feedback to others? What are the best ways to listen and use feedback from others, regardless of whether it was delivered well or not? 	Clemens

Date	Topic	By the end of class, you should be able to answer these questions	Instructor
Sun Oct 29th	Team case outline due		
Mon Oct 30 Class #13	Team meetings	<ul style="list-style-type: none"> Structured team feedback session Team meetings with your prof to discuss your team's case outline and team dynamics. 	Clemensin DSB 124. Stacey in normal room
MODULE 3: BECOMING RESPONSIBLE LEADERS			
Wed Nov 1 Class #14	Intro to Leadership	<ul style="list-style-type: none"> What are the different approaches to leadership? What is the difference between leadership and management? In what types of situations does an approach work best? How does leadership vary around the world? 	Clemens
Mon Nov 6 Class #15	Motivating and influencing others	<ul style="list-style-type: none"> What are the pros and cons of different approaches to motivation and influence? In what types of situations do they work best? How can I diagnose, analyze, and recommend solutions to motivational problems? What is the role of coaching in leadership? 	Clemens
Wed Nov 8 Class #16	Leadership and Power	<ul style="list-style-type: none"> What are social network structures? Why are they important within organizations? How do you identify the most influential individuals or groups within a social network? 	Clemens
Mon-Wed Nov 13-15	Reading break: No classes		
Mon Nov 20 Class #17	Exploring Indigenous Knowledges	<ul style="list-style-type: none"> What are common Indigenous foundations for working with people in a good way? How can Indigenous knowledges inform and improve the way we conventionally work with people? 	Francois Bastien in the First Peoples' House
11-12:20 (cohorts 4,5) 1:30-2:50 (cohorts 1,2,3)			
MODULE 4: PUTTING IT ALLTOGETHER			
Wed Nov 22 Class #18	Peer Review and Working Session	<ul style="list-style-type: none"> Finalize your individual portfolios Use peer review to support each other's work 	Clemens
Fri Nov 24	Individual portfolios due		
Mon Nov 27 Class #19	Team presentations	<ul style="list-style-type: none"> Present your draft analyses and solutions to the class. Support one another and improve your projects 	Clemensin DSB 124. Stacey in normal room
Wed Nov 29 Class #20	Team presentations	<ul style="list-style-type: none"> Present your draft analyses and solutions to the class. Support one another and improve your projects 	Stacey in BEC 209. Clemens in normal room
Fri Dec 1st	Team case final submission due		
Mon Dec 4. Class #21	Final Review	<ul style="list-style-type: none"> Recall and apply most of the material you learned this semester. Identify the key gaps where you should focus your studying. 	Stacey & Clemens

Legend	University breaks or admin	Team meetings with prof	Due dates	Modules
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COM 341 (A01-A03) Operations Management

Fall 2023 Course Outline

Note: Please check your course and program sites frequently for new updates and course changes.

Course hours (PST)	Tuesday, Thursday A01: 8:30am – 9:50am A02: 10:00am – 11:20am A03: 11:30am – 12:50pm
Location	A01: DSB C116 A02: DSB C112 A03: DSB C122
Instructor:	Liana Victorino, Ph.D. Pronouns: she/her
Office:	BEC 452
Office hours:	Wednesday 1:00pm – 2:00pm <i>or by appointment</i>
Email:	lianav@uvic.ca <i>Note: This is the <u>best</u> way to reach me. Please subject your email as COM 341.</i>

We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Introduction

Welcome to COM 341 Operations Management!

In this course we will be covering core operations management concepts, models, and tools. By the end of the term, you will have gained a set of operations management skills and tools that will help you to design, manage, and improve processes.

I look forward to our classes where we will discuss the integral role of operations within an organization. Your engagement in the learning process is key to the success of this course so please be sure to come to class prepared and ready to participate. Additionally, I want to emphasize that at any point in the term, if you should have a question or comment, please don't hesitate to email me (lianav@uvic.ca). I also would be happy to meet with you in office hours so please reach out if you ever need help with the course material.

Texts and Resources

[Heizer J., B. Render, and C. Munson. Operations Management: Sustainability and Supply Chain Management, 14th Edition. Pearson © 2023. ISBN-13: 9780137649136. \[eText\]](#)

Note: The link to purchase the eText is provided above. Please note that MyLab is NOT required.

Course Objectives and Description

This course is designed to address the key operations issues that have strategic as well as tactical implications for service and manufacturing firms. High-performing firms have demonstrated that efficient and effective operations management can become a potent competitive weapon in even the toughest business environments. We will examine both quantitative and qualitative operational techniques and principles used by “world-class” organizations from both the service and manufacturing sectors. Topics include operations strategy, process strategy, process analysis, process mapping, process improvement, quality management, forecasting, inventory management, and project management.

The course objectives are to:

- Understand core concepts, models and managerial issues in operations management.
- Appreciate the interdependence of operations management and other key functional areas in business organizations.
- Develop the ability to recognize, formulate and analyze business problems/issues related to operations management.
- Apply various quantitative and qualitative techniques to provide solutions to the complex problems in operations management.
- Develop numeracy and Excel skills.
- Enhance both oral and written communication skills.

Course Format

A combination of lectures, in-class discussions, readings, group and individual problem-solving assignments, and in-class exercises will be used to enhance student learning. Course materials will be posted to [Brightspace](#) for each session.

Equity, Diversity, and Inclusion

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Evaluation Elements

Students will be evaluated according to the following schedule:

Participation (Individual)	10% of grade	Due Date: ongoing for all classes
Team Presentation (Group)	15% of grade	Due Date: All teams must submit their team’s presentation slides on Nov 20 by 8pm on Brightspace ; Each team will be assigned later in the term to present in class on one of the following dates: Nov 21, 23, or 28
Midterm Exam (Individual)	30% of grade	Due Date: Oct 17 6:30pm - 8:30pm
Final Exam (Individual)	45% of grade	Due Date: TBD by University

Note: If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment’s grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower, or unchanged grade.

Course Assessment

Participation (10%): Participation is worth 10% of the overall grade. You are expected to participate in class; and the quality, not quantity of participation, counts. Attendance is a necessary but not sufficient component of participation. Therefore, you are unlikely to receive full marks for this portion of your grade just for attending all classes. You are expected to stay on task while working on in-class exercises, actively participate in class discussions, and not detract from other students' learning experience to receive high marks for participation.

Additionally, throughout the semester we will have in-class exercises whose success is dependent on your participation. Some of these exercises will be individual and some will be done in your groups. Although I generally will not collect written material from these, I will expect you to be able to discuss these problems and your analysis. Your contribution to these discussions will be part of your participation grade.

If you do not attend class, then you cannot participate and thus your participation grade will reflect your attendance. Also, please note that being late or leaving early from class will result in poor participation marks; in addition, such behaviour may be treated as an absence for that session. Please refer to the Attendance and Participation section for more information.

Team Presentation (15%): The objective of the team presentation is to showcase an organization's excellence in one of the key operational themes covered within the course (e.g., process analysis, process mapping, quality management, process improvement, forecasting, inventory management, or project management). There are two deliverables: your team's in-class presentation and the corresponding presentation slides which must include your references. Each team member must also submit a peer evaluation. More details about the team presentation will be provided on [Brightspace](#).

Each team will be assigned a day when they will present in class. The possible dates are Nov 21, Nov 23, and Nov 28. Dates will be assigned later in the term.

All teams must submit their finalized presentations slides by **Monday November 20th at 8pm** on [Brightspace](#) (regardless to when your team is assigned to present). No changes may be made to your team's presentation slides after it has been submitted.

Late submissions for the presentation slides will normally receive a grade penalty of 20% for each day it is late.

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Note: When a group-based assignment forms part of your evaluation for a grade, the group will normally receive one grade. You will complete a peer evaluation (which includes a self-evaluation); such feedback may be used to adjust marks of individual group member grades.

Use of Artificial Intelligence (AI): In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, is permitted as a possible research tool for the team presentation but must be properly cited and information used should be verified with other sources. Therefore, an AI tool like ChatGPT should NOT be the only research tool used by your team. In addition, your team's presentation must be your team's original work thus AI tools must be used in an ethical manner. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI.

Midterm Exam (30%) & Final Exam (45%): There will be two exams in this course, a midterm and a final. The midterm makes up 30% and the final 45% of the overall grade. The midterm will cover all material up to the midterm. The final will cover **all** course material. Therefore, it is a **cumulative** final and is intended to offer students an opportunity to integrate course topics into a coherent whole. Work is individual for exams and all students are expected to pursue the highest standards of academic integrity.

Exams might contain (*but are not limited to*) multiple-choice questions, true/false questions, fill-in-the-blank questions, short answer/listing types of questions, and/or qualitative or quantitative essays/long answers. All in-class material (e.g., readings, lecture content, discussions by fellow students in the class, learning exercises and the like) will be fair game for exams. More information about the exams will be provided in class as the exam date nears.

The midterm exam is scheduled for:

Tuesday, October 17th from 6:30pm to 8:30pm in BWCB150

The final exam will be scheduled during the University's final exam period. Students who fail to complete the final exam (except in cases of illness, injury, or family affliction) will receive a grade of N in the course.

*** Please make every effort to take the exams at the prescribed date and time. Students who should miss an exam without a valid excuse (such as cases of illness, injury or family affliction) will not have an opportunity to make up this grade component. If you should miss an exam and would like the opportunity to make up this grade component, you will need to email your instructor, as soon as possible (preferably in advance to missing the exam, if possible), to inquire about your eligibility to write a deferred exam.

If you are absent from the exam due to illness, please note that no medical documentation is required. Instead, you are to document your illness by submitting the "Self-Declaration for Absence from an Assessment" form to your instructor for their consideration. This self-declaration form is to be used in place of a medical note/supporting documentation from University Health Services or a community health professional. A copy of this form is on [Brightspace](#). You should familiarize yourself with this form and the declarations contained therein.

*** All students are expected to pursue the highest standards of academic integrity. Please refer to the Academic Integrity section for more information.

Attendance and Participation

Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

In this course, attendance and participation will form 10% of your course grade.

While attendance is a pre-requisite for participation, I understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, I encourage you to stay home when you are sick, taking care of yourself and protecting others. You may also choose to miss class for a job interview, home responsibilities, or a host of other reasons. To accommodate the possibility of such occasional absences during the term, the four lowest marks will be dropped from the assessment of your participation.

Although there is an accommodation for up to four absences in the term, I want to emphasize that your presence in class positively affects your intrinsic learning, as well as that of your teammates, and contributes greatly to the overall learning environment. Therefore, your participation grade will be impacted if you have more than four absences in the term. Students missing more than four classes may request a make-up assignment from me for each additional absence. It is your responsibility to ask me for a make-up assignment within 4 calendar days of the missed class. In addition, you will be denied permission to write the final exam if you miss more than eight classes.

Exceptions to these attendance policies will only be considered for major extenuating circumstances, with permission from the Undergraduate Academic Director.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

If you are absent due to illness for a graded component of this course, you must submit the "Self-Declaration for Absence from an Assessment" form to your instructor for their consideration. A copy of this form is on [Brightspace](#). You should familiarize yourself with this form and the declarations contained therein.

Laptops and Tablets Use in Class

Laptops and tablets will be allowed for use in Com 341 for the purpose of taking notes and for in-class exercises. However, there may be times in class where you might be asked to put away your laptops and tablets due to the nature of a class activity, so please be prepared for that. In addition, there will be two classes where laptop use will be encouraged because we will use Excel to do statistical analysis of data. All other uses, such as responding to emails or visiting non-course related websites, are distracting to your learning, the learning of others, and to the instructor. The use of laptops or tablets for any purpose other than taking notes and completing in class exercises is strictly prohibited. If technology is used for non-approved purposes, a student's participation grade will be negatively impacted.

Thank you in advance for using your laptop/tablet in a productive and respectful manner.

Grading Scale

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade (used to determine your course letter grade) will be rounded to the nearest whole percentage (e.g., a course percentage grade of a 79.49% would be reported as a 79% and result in a letter grade of a B+). The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades: **Please note that “A” grades are normally achieved by a minority of students.**

Percentage Range	Grades	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: The final exam must be completed, or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the Academic Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Course Experience Survey

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Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <https://ces.uvic.ca> to complete the survey.

Academic Integrity

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
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- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

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Course Schedule 2023

DATE	TOPIC	READING ASSIGNMENT
(#1) Sept 12	Course Introduction: Operations Management	Ch. 1 Operations and Productivity
(#2) Sept 14	Process Analysis (I)	
(#3) Sept 18***	Process Analysis (II)	Chapter 7S (p. 304, 310 – 313) Capacity, Bottleneck Analysis
(#4) Sept 19	Operations Strategy	Ch. 2 Operations Strategy
(#5) Sept 26	Project Management (I)	Prepare for Quiz Ch. 3 (p. 59 – 77) Project Management
(#6) Sept 28	*** In-Class Practice Quiz Project Management (II)	Ch. 3 (p. 78 – 82) Project Management
(#7) Oct 3	Process Mapping	Ch. 7 (p. 284 – 289) Process Analysis and Design
(#8) Oct 5	Quality Management	Ch. 6 Managing Quality
*** Oct 5	*** Organization Selection DUE by 8pm	Organization Selection
(#9) Oct 10	Midterm Review	Prepare for Midterm Exam
(#10) Oct 12	Process Improvement (I)	Ch. S6 (p. 243 – 254) Statistical Process Control
(#11) Oct 17	Process Improvement (II) <i>Excel Lab – Statistical Process Control</i>	Ch. S6 (p. 243 – 254) Statistical Process Control <i>Please bring your laptop – Excel</i>
*** Oct 17	*** Midterm Exam <i>The in-person midterm exam for COM 341 is scheduled for October 17th (Tuesday) from 6:30pm to 8:30pm in BWC B150.</i>	Midterm Exam
(#12) Oct 18***	Process Capability	Ch. S6 (p. 257 – 259) Process Capability
(#13) Oct 24	Forecasting (I)	Ch. 4 (p. 103 – 117, 124 – 126) Forecasting
(#14) Oct 26	Forecasting (II) <i>Excel Lab – Forecasting</i>	Ch. 4 (p. 103 – 117, 124 – 126) Forecasting <i>Please bring your laptop - Excel</i>
(#15) Oct 31	Managing Independent Demand Inventory Systems (I)	Ch. 12 (p. 489 – 504) Inventory Management
(#16) Nov 2	Managing Independent Demand Inventory Systems (II)	Ch. 12 (p. 509 – 512; 516) Inventory Management

(#17) Nov 7	*** In-Class Practice Quiz Managing Independent Demand Inventory Systems (III)	Ch. 12 (p. 509 – 512; 516) Inventory Management
(#18) Nov 9	Managing Dependent Demand Inventory Systems (I)	Ch. 14 (p. 569 – 581) MRP
Nov 14	<i>No Class: Reading Break</i>	_____
(#19) Nov 16	Managing Dependent Demand Inventory Systems (II)	Ch. 14 (p. 569 – 581) MRP
*** Nov 20	*** Presentation Slides DUE by 8pm on Brightspace	Presentation Slides
*** Nov 21	Team Presentations I	<i>Please bring your laptop/tablet</i>
*** Nov 23	Team Presentations II	<i>Please bring your laptop/tablet</i>
*** Nov 28	Team Presentations III Course Experience Survey	<i>Please bring your laptop/tablet</i>
(#20) Nov 30	Course Review	Practice Problem Set Prepare for the Final Exam
*** Nov 30	*** Peer Evaluations DUE by 8pm on Brightspace	Peer Evaluation
*** TBD	<i>The in-person final exam for this course will be scheduled during the University's final exam period. Information regarding the exact date, time, and location of the exam will be announced in class and shared on Brightspace.</i>	Final Exam

The course schedule is subject to change. Please check Brightspace frequently for up-to-date information about the course schedule.

Note: Page numbers for assigned readings are from the 14th Edition. For those chapters without page references, please read the entire chapter.

Note: Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



COM 351

Principles of Marketing (All Cohorts)

Fall/Spring/Summer 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.	
Course hours (PST)	A03: T, TH 08:30-09:50 DSB 122 Smith A02: T, TH 10:00-11:20 DSB 116 Smith
Location	A01: T, TH 11:30–12:50 DSB 112 Smith A05: T, TH 02:30-03:50 DSB 122 Swaffield
Instructor	A04: T, TH 04:00-05:30 DSB 116 Swaffield
Office hours: Telephone: Email:	<i>Smith: T, TH 1:00 to 2:00, otherwise by appointment</i> <i>250-721-6070</i> <i>Smithb@uvic.ca</i>
Office hours: Telephone: Email:	<i>Swaffield</i> <i>Virtual office hours by appointment</i> <i>jimswaffield@uvic.ca</i>

We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Introduction:

Welcome to Com 351! Your instructors Dr. Brock Smith and Dr. Jim Swaffield have a wealth of experience in the teaching and practice of marketing. We look forward to helping you become effective marketing decision-makers.

Texts and Resources:

- Most readings and cases are available on Brightspace pursuant to the [Fair Dealing Guidelines](#) of the University, library database licenses, and other university licenses and policies. The copy may only be used for the purpose of research, private study, criticism, review, news reporting, education, satire or parody. If the copy is used for the purpose of review, criticism or news reporting, the source and the name of the author must be mentioned. The use of this copy for any other purpose may require the permission of the copyright owner.
- There is one case to purchase from Ivey Publishing (\$4.95).
 1. Go to the Ivey Publishing website at www.iveypublishing.ca.
 2. Log in to your existing account or click "Register" to create a new account and follow the prompts to complete the registration. If registering, choose the "Student" role.

3. Click on this link or copy into your browser: <https://www.iveypublishing.ca/s/ivey-coursepack/a1R5c00000Fvby0EAB>
4. Click "Add to Cart".
6. Go to the Shopping Cart (located at the top of the page), click "Checkout", and complete the checkout process.
7. When payment has been processed successfully, an Order Confirmation will be emailed to you immediately and you will see the Order Confirmation screen.
8. Once you have completed your order, click on your username on the top right --> Orders --> Downloads

IMPORTANT: Access to downloadable files will expire on the course end date, so be sure to save a copy on your computer. The downloadable file is a PDF document that can be opened using Adobe Reader. This material is for your personal use only and is not to be shared, reproduced, or distributed in any form.

NEED HELP ? Contact your professor directly or email Ivey Publishing's Customer Support Team at cases@ivey.ca.

Course Objectives and Description:

The main objective of this course is to prepare learners to be effective marketing decisions makers. To achieve this objective, learners need to:

- Understand, and be able to use, marketing terminology
- Be able to apply marketing theory, concepts, and principles to make key decisions relating to marketing strategy, tactics, and implementation.
- Develop the necessary skills to analyze simple marketing problems and develop solutions consistent with that analysis.

A secondary objective of the course is to enhance both oral and written communication skills relating to the evaluation and presentation of marketing solutions.

To achieve these objectives, we will devote most of our class time to making and defending marketing decisions. We expect you to come to class having read the assigned text chapter and prepared assigned cases and exercises. Class contribution is a significant part of the course assessment.

Course Format:

The format of the course comprises a mix of lectures, case discussions and issue discussion. Our main focus is the application of marketing theory, concepts, and acumen to making informed marketing decisions. To do this you need to be prepared to participate in every class. This means reading the assigned text chapters before class, reading assigned cases and doing case analysis before class, and engaging in the discussions during class.

Instead of having a midterm, there will be periodic chapter quizzes (using Brightspace to ensure that everyone is mastering the text and classroom material. Solid preparation means we can spend our class time developing marketing decision-making skills and applying concepts – which is a lot more fun than having an instructor drone on about the concepts themselves. The five quizzes are worth 2% each, and collectively 10% of the course grade. There will be five to ten questions per quiz and the quiz will be administered electronically via Brightspace. The objective is to reward the students who come to class prepared to apply concepts.

Laptops and tablets will be allowed for use in Com 351 for the purpose of taking notes and for in-class exercises. All other uses are distracting to your learning, the learning of others, and to the instructor. The use of laptops or tablets for any purpose other than taking notes and completing in class exercises is strictly prohibited. If technology is used for non-approved purposes, students may be asked to leave the classroom.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology

We may use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

Currently we have not assigned educational technologies, which stores or accesses your personal information outside Canada, We will make you aware if this changes. If adopted we use these technologies to enhance your educational experience at UVic and we will notify you if personal information is required by the service.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title (begin with Course Code)	Individual or Group	Type	Due Date	Weight / %of grade
COM 351 Contribution	Individual	Contribution		10%
COM 351 Case 1	Group	Hand-in Assignment	Oct 20 th 5pm	20%
COM 351 Case 2	Group	Hand-in Assignment	Nov 17 th 5pm	20%
COM 351 Final Exam	Individual			40%
6 quizzes best of 5 questions	Individual	In-class	See course schedule	10% (2% each)
Total				100%

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that we may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Experience Survey:

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Course Assessment:

Grading rubrics will be provided with the documents that detail the assignments. If you have questions about the assignments or the grading rubrics, please speak with your instructor well before the due date of the assignment.

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first and then refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of **3%** for each day an assignment is late.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, **is permitted** in this course for students who wish to use them. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI.

Attendance and Participation:

Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the

readings, to your classmates' insights and helps clarify material, leading to better performance in the course.

In this course, participation will form **10%** of your course grade. While attendance is a pre-requisite for participation, we understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, we encourage you to stay home when you are sick, taking care of yourself and protecting others.

If you are absent from a class, you can still get full participation marks *for up to four missed classes* by creating or contributing to a Brightspace forum and sharing insights about the material covered that day that would benefit your classmates. If you miss more than four classes your participation grade will be negatively affected, barring major extenuating circumstances. We want to emphasize that your presence in class positively affects your intrinsic learning, as well as that of your teammates, and contributes greatly to the overall learning environment. If you miss an in-class quiz, that 2% of your grade will be added to the final exam weight. If you miss more than 8 classes, you may not be permitted to write the final exam. Exceptions to these attendance policies will only be considered for major extenuating circumstances, with permission from the Undergraduate Academic Director.

In addition, working in teams is a key component of your learning experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

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Schedule Summary:

Date	Topic	Activity or Preparation	
T Sept 12	Course Introduction	<p>Read: <u>Marketing: The Core- 5th Canadian Edition (2018), Chapter 1: Marketing Fundamentals</u></p> <p>Watch video: Introduction to Marketing. https://youtu.be/r9d0G8W6plw</p>	
TH Sept 14	Situation Analysis and SWOT	<p>Conducting a Situation Analysis https://youtu.be/q3k4kx9QZ9k</p> <p>Read: Strategic SWOT Analysis Primer (Brightspace)</p>	
T Sept 19	Analyze case (SWOT)	<p>Prepare Case: Nike: Tiptoeing into the Metaverse (Ivey Publications Course Pack - \$4.50)</p>	
TH Sept 21	Segmentation	<p>Brock</p> <p>Read: Think Marketing 3rd edition, Chapter 7: Market Segmentation and Target Marketing</p> <p>Quiz #1 Optional</p> <p>videos:</p> <p>1. Market Segmentation https://youtu.be/vNZSWHi_6h0</p>	
T Sept 26	Segmentation case/application	<p>Prepare Case: Tallships Victoria</p>	
TH Sept 28	Positioning	<p><u>Read:</u> 1. Company and Product Positioning (PDF)</p>	
T Oct 03	Branding	<p>2. How Positioning Guides Branding (PDF)</p> <p><u>Watch video:</u> Positioning and Branding. https://youtu.be/tP7EfY72SW8</p> <p>Prepare: Positioning Map In Class Exercise</p>	

TH Oct 05	Consumer Behavior and the Consumer Decision Making Process	<p><u>Read:</u> MKTG, 5th Canadian Edition (2020). Chapter 5: Consumer Decision Making</p> <p><u>Watch videos:</u> 1. High and Low Consumer Decision-to-Purchase Processes. https://youtu.be/gDn409qbXR0</p> <p>Quiz #2</p>	
T Oct 10	Consumer Behavior Case	<i>Prepare Case: Better with Ice Cream</i>	
TH Oct 12	Organizational Buying Behavior	<p>Read: Marketing Real People, Real Decisions 4th Canadian Edition (2013). Chapter 6: Organizational Buying Behavior.</p> <p>Quiz #3</p> <p>Optional Video: 1. Business-to-Business Buying https://youtu.be/5NDIYL9fEfo</p>	
T Oct 17	Market Research	<p><u>Read:</u> Marketing Research – Chapter 7 (PDF)</p> <p><u>Watch video:</u> 1. Marketing Research https://youtu.be/ePxIbfWUZsl</p>	
W Oct 18	No Class (note Thursday classes are held on Wednesday this week only)	Start to work on 1 st case assignment	
FRIDAY OCT 20th		1st Case assignment due 5 PM	
T Oct 24	Market Research	TBD	
TH Oct 26	Product Decisions	<p>Read: Principles of Marketing 17th edition, Chapter 8: Products, Services, and Brands</p> <p>Quiz #4</p> <p>Watch Video: The Diffusion of Innovations Model https://youtu.be/-qZqXkS-9Ao</p>	
T Oct 31	Service Decisions	<p>In-class: Service Quality Exercise</p> <p>Optional Video: Services Marketing https://youtu.be/42BC9NhvM0E</p>	
TH Nov 02	Product/Services Case	<i>Prepare Case: Irene Gamalo Buys a Farm</i>	
T Nov 07	Pricing	Read: Marketing 7E (2012), Chapter 11: Price the Product	

		<p>Quiz #5</p> <p>Optional Video: Pricing and the Value Equation https://youtu.be/KycNHiumylg</p>	
TH Nov 09	Pricing Case/Application	Prepare Case: Meep Meep	
T Nov 14	Reading Break/Stat		
TH Nov 16	Marketing Communications Part 1–Developing Communication Objectives)	<p><u>Read:</u></p> <ol style="list-style-type: none"> 1. The Art of Developing Communication Objectives. (PDF) <p><u>Watch videos:</u></p> <ol style="list-style-type: none"> 1. Integrated Marketing Communications https://youtu.be/j2EYyyOm6lg 2. Communication Hiérarchies https://youtu.be/4OtTxQXk-88 <p><u>Watch the following videos and link concepts to this lesson.</u></p> <ol style="list-style-type: none"> 2. Using the High-Involvement Decision to Purchase Process to Guide Campaign Development. https://youtu.be/ERn--u4V 	
FRIDAYNOV 17		2nd Case assignment due 5 PM	
T Nov 21	Marketing Communications (Part 2 – Designing Promotional Materials)	<p><u>Read:</u></p> <ol style="list-style-type: none"> 1. Principles for the Layout and Design of Promotional Materials. (PDF) 2. Applied Marketing, 1st Edition (2019) Chapter 11: Using Promotion to Communicate with Customers. You can skim this, focus on the overview of communication mix elements. <p>Quiz #6</p>	
TH Nov 23	Marketing Communications (Part 3 – Selecting Mediums to Carry a Promotional Message)	<p><u>Read:</u></p> <ol style="list-style-type: none"> 1. Developing a Media Plan. (PDF) <p><u>Watch video:</u> Jim Swaffield on Media Fraud (Consulting video). https://youtu.be/iB-J7fc_jnk</p>	
T Nov 28	Distribution	<p>Read: Principles of Marketing 6th Canadian Edition, Chapter 11: Marketing Channels</p> <p>Prepare Case: Wise Tea</p> <p>Optional Videos</p> <ol style="list-style-type: none"> 1. The 3rd "P" Place https://youtu.be/m86S8YAPUtA 	

		2. Retailing https://youtu.be/gY8cWS5tvRk	
TH Nov 30	Wrap-up Class		

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



COM 361 (A01-05)

International Business

Fall 2023 Course Outline

Note: please check your course and program sites frequently for updates and course changes.

Course hours (PST) and Location:	A01 - Monday & Wednesday: 10:00 am – 11:20 am DSBC116 A02 - Monday & Wednesday: 11:30 am – 12:50 pm DSBC112 A03 - Monday & Wednesday: 8:30 am – 9:50 am DSB C122 A04 - Monday & Wednesday: 4:00 pm – 5:20pm DSB C116 A05 - Monday & Wednesday: 1:30 pm – 2:50pm DSB C122
Instructors:	Ben Lukenchuk; Dr Takahiro Endo
Office hours:	Ben Lukenchuk – In-person : Tuesday from 1:00-2:30 <i>or</i> by appointment in BEC 222; Zoom : By appointment. Please note that I am kindly requesting students turn their cameras on during Zoom meetings. Dr Takahiro Endo – Thursday 10:30-11:30 am, viaZOOM (link on Brightspace) <i>or</i> by appointment in BEC 437
Email:	Prof Ben Lukenchuk, benluken@uvic.ca Dr Takehiro Endo, endot@uvic.ca Note: This is the best way to reach the instructors. Please start subject of emails with “COM 361”.

We acknowledge and respect the lək' wəjən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSANEC peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Introduction:

This course has two instructors. Ben Lukenchuk will teach the first two-thirds and Takahiro Endo will teach the last one-third of the semester.

Ben Lukenchuk:

Welcome! My name is Ben (he/him), and I will be one of your instructors for COM 361. I am a University of Victoria Economics alumnus but was born and raised in Calgary, AB. I went on to receive my Master of Arts in economics from McMaster University in Hamilton, ON and a Bachelor of Education from the University of Ottawa. Before joining GSB, I worked as an economist for the federal government with Environment and Climate Change Canada and at Finance Canada. My publications have been on public health issues. When not working and teaching, I enjoy beach walks with my wife, Rebecca, and Yorkshire Terrier, Hank, triathlon, and spin instructing. I am looking forward to getting to know you this semester!

Takahiro Endo:

Hello, my name is Takahiro Endo. Call me Endo or Endo-san. I am originally from Japan and did my undergraduate and master studies there. Then, I moved to Wales (in the UK) for my doctoral study. There, I became a big fan of rugby and realized the importance of understanding international business! Let's learn this fascinating subject together!

Texts and Resources:

Hill, C. 2023. International Business – Competing in the global marketplace. 14th edition, McGraw-Hill Education, ISBN# 9781265038540

Note: Older editions, such as editions 11, 12, and 13 can be used

Course Objectives and Description:

The course focuses on the rapidly changing contemporary international business environment and assesses the opportunities and challenges arising from this endlessly changing milieu. It takes a *macro*, *meso*, and *micro* perspective and draws on key insights from economics, political science, economic geography, and strategic management. For instance, students will learn about globalization processes, the role of institutions and different political, economic, and legal systems, global trade, investments, monetary systems, and the strategy and structure of international business.

The course objectives are to:

- **recognize** worldwide dynamics linked to globalization.
- **discuss** complexities and challenges related to international trade.
- **recognize** the political, legal and financial environments in an international context.
- **evaluate** how attractive and challenging different business environments are.
- **discuss** strategy and structure of international business activities.

Additionally, students will get the opportunity to enhance their leadership skills by working collaboratively in groups, under time pressure and as individual researchers (e.g., making strategic decisions on the organization of their own work). Other skills (all of them critical for students' future professional practice) such as critical thinking, analytical skills, commercial awareness, as well as integration and communication skills will be practiced frequently in this course too.

Course Format:

The course uses a combination of in-person lectures, in-class discussions, pre- and post-session readings, group assignments, and video examples to facilitate student learning and skill development. Given that the first-hand experience in each of these activities is crucial in the development of student learning, you are expected to actively participate in class and reflect on the lessons' learning and application of activities.

Laptops, cell phones, and other personal technology devices are not to be used during classes unless expressly directed by the instructor or requested at CAL.

Unless you have an accommodation need that has been discussed with us, we are kindly asking that students do not record our classes and lectures.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, we intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let us know if we can do better to support your rights in our classroom. We will also do our best to listen and respond compassionately if you want to share with us how we can be better allies.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title (begin with Course Code)	Individual or Group	Type (Exam, Hand-in Assignment, Presentation, Quiz, Other)	Due Date (m/d/yyyy hh:mm AM/PM)PST	Weight / % of grade	Description
COM 361: Midterm exam	Individual	Exam	10/13/2023, 2:30 – 4:30 PM	25%	In-person open book exam, long written answer style questions/small cases, all questions need to be answered, testing application of course content up to exam day
COM 361: Final exam	Individual	Exam	In the December exam period	35%	In-person open book exam, case and long written answer style questions, all questions need to be answered, testing application of entire course content
COM 361: Group assignment	Group	Hand-in assignment	11/24/2023, 8:00 PM	25%	Assessment information provided in class
COM 361: Quizzes	Individual	Quiz	09/15/2023, 09/22/2023, 10/06/2023, 10/20/2023, 11/03/2023, 11/10/2023, 12/01/2023, 8:00 PM	15%	There will be 7 quizzes, with 10 questions per quiz. <u>The average of your best 5 quizzes will count toward your final grade.</u>
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that we may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Description of evaluation standards for evaluation elements.

Quizzes: There will be eight open-book quizzes, based on material covered in the readings and lectures for a given week. **Only your best five quizzes will count toward your final grade.** The dates and material covered for each quiz are in the table below. Please refer to the schedule table on page 7 for the topics and readings associated with each week. Each quiz will have 10 randomly selected multiple choice questions. Quizzes will be done through BrightSpace. You can start each quiz at any time of your choosing after the “quiz available” time specified for each quiz in the table below. Once you start, you have 30 minutes to finish¹. Make sure you finish your quiz not later than the time indicated in the “quiz closes at” column of the table below. If you lose your internet connection mid-way through your quiz, *do not close your browser*, BrightSpace *should* let you continue where you left off once you get your connection back.

Quiz	Material Covered:	Quiz Available Starting:	Quiz Closes At:
#1	Week 1 (Sept 11 & 13)	8:00am PST on 09/14/2023	8:00pm PST on 09/16/2023
#2	Week 2 (Sept 20 & 21)	8:00am PST on 09/22/2023	8:00pm PST on 09/24/2023
#3	Week 3/4 (Sept 25, 27 & Oct 4)	8:00am PST on 10/05/2023	8:00pm PST on 10/07/2023
#4	Week 6 (Oct 16 & 19)	8:00am PST on 10/20/2023	8:00pm PST on 10/22/2023
#5	Week 8 (Oct 30 & Nov 1)	8:00am PST on 11/02/2023	8:00pm PST on 11/04/2023
#6	Week 9 (Nov 6 & 8)	8:00am PST on 11/09/2023	8:00pm PST on 11/11/2023
#7	Week 11/12 (Nov 20, 22 & 27)	8:00am PST on 11/28/2023	8:00pm PST on 12/02/2023

Midterm exam: The midterm exam will cover all in-class material up to the day of the exam, i.e., all mandatory readings, session content, discussions, videos, learning exercises and the like. This is an open-book, individual exam, and all students are expected to pursue the highest standards of academic integrity (see more details below).

The exam will include cases and long-written answer-style questions/small cases. The long answer-style question will need to be answered in written paragraphs, not a bullet point-style answer. Students will have to answer all posed questions. More information about the exams will be provided in a session closer to the exam date.

Final exam: The final exam will cover the entire course material, i.e., mandatory readings, session content, discussions, videos, learning exercises and the like. This is an open-book, individual exam, and all students are expected to pursue the highest standards of academic integrity (see more details below).

The exam will include cases and long-written answer-style questions/small cases. The long answer-style question will need to be answered in written paragraphs, not a bullet point-style answer. Students will have to answer all posed questions. More information about the exams will be provided in a session closer to the exam date.

Group Assignment: The purpose of group work is to enhance your skill in working collaboratively and apply the learning of the course. The group assignment will require you and your group members to use and apply the course content up to the submission of the report. More information about the assignment will be provided in class, on BrightSpace, and in a session closer to the submission deadline of the report. Submission will be through BrightSpace.

At the Gustavson School of Business, team projects and assignments are an integral component of student learning. It is an expectation that students contribute equitably to all team assignments. To receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, putting diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

¹ Students registered with CAL will have their times adjusted.

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of **10%** for each day an assignment is late.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, **is permitted for group assignments, but not permitted for mid-term and final exams** in this course for students who wish to use them. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI. **Assignment guidelines will provide additional guidance as to how these tools might be part of your process for each assessment this semester and how to provide transparency about their use in your work.**

Attendance and Participation: Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Core year experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

While regular attendance is expected, we understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, we encourage you to stay home when you are sick, taking care of yourself and protecting others. Attending class is always your choice. You may choose to miss class for a job interview, home responsibilities, work-life flexibility or a host of other reasons. If, however, you miss more than **4** classes for any reason, you will receive a **5%** deduction from your final course grade for every additional class missed, unless you complete a make-up assignment for each additional class missed. It is your responsibility to ask us for a make-up assignment within 4 calendar days of the missed class.

In addition, students will be denied permission to **write the final exam**, if you miss more than 8 classes.

Exceptions to these attendance policies will only be considered for major extenuating circumstances, with permission from the Undergraduate Academic Director.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Students who have a passing grade throughout the term but have a failing final grade due to their performance on the final examination may be eligible to write a supplemental exam. Such supplemental exams are limited to one core course per term for any student. The BCom office will notify eligible students after all term grades for core classes have been submitted. A final grade in the course with a passing supplemental exam result cannot exceed 59%

Final course grades are official only after they have been approved by the Academic Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.

- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- providing answers to another student in any test, examination, or take-home assignment.
- taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

Week	Date	Topic	Reading	Instructor
Week 1	11-Sep	Introduction to the IB Environment	Chapter 1	Jen
	13-Sep	International Trade	Chapter 6	Jen
Week 2	20-Sep	Political, Economic & Legal Systems	Chapter 2 + pages 85-89 from chapter 3	Endo
	21-Sep	Government Policy around Trade	Chapter 7	Ben
Week 3	25-Sep	Foreign Exchange	Chapter 10	Ben
	27-Sep	Global Economic Policy Current Events	Articles posted on Brightspace	Ben
Week 4	2-Oct	No class - Statutory Holiday		
	4-Oct	Topic TBD (based on class interest)	TBD	Ben
Week 5	9-Oct	No Class – Statutory Holiday		
	11-Oct	Review and Catch Up		Ben
	13Oct	MIDTERM EXAM		
Week 6	16Oct	Introduction to IB Activities	Chapter 3	Ben
	19Oct	FDI (Inward FDI)	Chapter 8	Ben
Week 7	23Oct	FDI (Outward FDI)	Chapter 8	Ben
	25Oct	Regional Economic Integration	Chapter 9	Ben
Week 8	30Oct	Strategy of IB I	Chapter 13	Endo
	1-Nov	Strategy of IB II	Chapter 13	Endo
Week 9	06Nov	Organization of IB I	Chapter 14	Endo
	08Nov	Organization of IB II	Chapter 14	Endo
Week 10	13Nov	No Classes - Reading Break		
	15Nov			
Week 11	20Nov	Market Entry Strategies	Chapter 15	Endo
	22Nov	Global Business Functions I	Chapter 17	Endo
	27-Nov	Global Business Functions II	Chapter 18	Endo
Week 12	28Nov	Special guest lecture by Pat Ellis (Bluenote Saké)		
	29Nov	Class Cancelled in lieu of guest lecture on November 28		
Week 13	4-Dec	Review and Wrap Up		Endo

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



COM 400 (A01) Strategic Management Fall 2023 – Course Outline

Note: please check your course and program sites frequently for updates and course changes.

Course hours (PST)	Tuesday and Thursday – 11:30 am to 12:50 pm
Location:	DSB C116
Instructor:	Sudhir Nair, PhD
Office:	BEC 431
Office hours:	1:30 pm to 2:00 pm T/ Th OR by prior appointment. Please email me and I will work with your schedule to ensure that I meet with you.
Email:	sudhirn@uvic.ca

We acknowledge with respect the Lekwungen-speaking peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

***UVic is committed to promoting, providing and protecting
A supportive and safe learning and working environment for all its members.***

Introduction:

My name is Sudhir Nair and I will be your instructor for COM 400. I want to take a minute to introduce myself so you know a little bit about me by the time we meet in class.

I have an undergraduate degree in Electrical Engineering and an MBA. After receiving my MBA, I started out as a banker working in Citibank, working in financial services in a variety of roles. After that I felt like I needed to be on my own and I co-founded a company that developed networking solutions. I then moved to another entrepreneurial venture, and started a company that manufactures pet snacks; I know - big jumps in what I chose to do!

After having worked in industry for over 15 years, I went back to school and completed my PhD program at the University of Massachusetts in Amherst, MA, USA and am now an Associate Professor of International Business and Strategy here at the Gustavson School of Business. I have been here since 2011. I have published my research in various top Strategy, Management and International Business journals. More recently, I have been researching the newcomer (immigrant and refugee) space in Canada from an interdisciplinary perspective. This work has been recognized with the *Gustavson School of Business International Advisory Board's Community Engagement Award* in 2018. I was also honoured to receive the *Gustavson School of Business Award for Teaching Excellence* in 2013. On a personal level, I am married and have 2 wonderful children – all of whom provide great support as I continue on this fascinating academic journey.

Texts and Resources:

Capstone - The Business Simulation - Management Simulations Inc. (to be purchased individually by each student online at www.capsim.com at a cost of approximately US\$54)

Hitt, M. A., Ireland, R.D., & Hoskisson, R.E. Strategic Management: Competitiveness and Globalization, 13th edition, available at the Uvic Bookstore OR from the publisher [here](#) (please only buy the book and **NOT** the additional MindTap content)

Course Objectives and Description:

We have three key objectives this term in COM 400.

First, this course is designed to give you a “top-level” view of the entire organization. You will have to consider issues that influence the competitive behavior and performance of the organization as a whole. So far in your coursework you have primarily studied business functions (e.g., accounting, finance, marketing) one at a time. This course will help you broaden your perspective so that you consider business functions from the perspective of the overall organization.

Second, we will need to learn to deal with ambiguity. Some fields present well-defined problems with right and wrong answers. This is not true of management in general and strategic management in particular. Strategic decision-makers generally deal with complex situations characterized by considerable uncertainty. All of us are currently dealing with a pandemic that has induced uncertainty that is unprecedented, at least in current times. The threat or opportunity is rarely obvious and it's not always clear which is which. Strategy is, fundamentally, about the future and the future is always unknown. This course will help you develop skills and knowledge for dealing with ambiguity and assist you in identifying and evaluating alternative courses of action.

Third, we will learn to work in teams as most managers work as part of teams. This term, much of your work will be done in teams. Except for tests and in-class assignments, all other work will be done as part of a team. Learning to work productively as part of a team is a key managerial skill that we will work to develop this term.

Course Format:

To achieve these objectives, in this class we will work on integrating two essential parts of management: knowing and doing. The “knowing” part involves using cases, readings, and discussions to learn the basic concepts and techniques of strategic management. The “doing” part involves your participation in Capstone, an online business simulation program. Capstone provides you with the opportunity to gain hands-on experience running a business. Your team will develop overall business strategies as well as manage your company's R&D, production, HR, marketing, and financial operations over a simulated 8-year time span. The ultimate goal: To have fun and learn, while managing your firm.

To prepare for class, start by reading the relevant textbook chapter (see schedule below). I will post videos on Brightspace that will provide additional context and nuance to the textbook material. This will be available for you to view and prepare for class. Please ensure you view the videos **prior** to the class sessions. In the class sessions, we will start by quickly revisiting the text content and then apply the material to specific mini cases or experiential exercise. Many of these classes will involve group work. I will provide time for you to work in your teams that will allow you to discuss the relevant issues within your group; and we will then reassemble with the entire class, to discuss key discussion points.

NOTE: To ensure that you stay with real world organizational issues, I strongly recommend that you engage with The Economist, Business Week, or any other similar media outlet.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: Zoom (if needed) and CAPSIM. I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at <https://zoom.us/privacy> and at <https://www.capsim.com/terms/#/policy>. I encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title (begin with Course Code)	Individual or Group	Type (Exam, Hand-in Assignment, Presentation, Quiz, Other)	Due Date (mm/dd/yyyy)	Weight /% of grade	Description
COM 400: DAQs	Individual	Other	Daily in class	10%	Daily assignment questions (DAQ) as described above in course outline
COM400: Class participation	Individual	Other	Daily in class AND in group activities	15%	Involvement in class AND in teams
COM 400: Test # 1	Individual	Quiz	09/28/2023	20%	Test covering chapters 1 through 6
COM 400: Test # 2	Individual	Quiz	10/17/2023	20%	Test covering chapters 7 through 10
COM 400: Capstone Simulation Situational Analysis	Group	Hand-in Assignment	10/31/2023	5%	Details at CAPSIM website

COM 400: Capstone Simulation Strategic Plan	Group	Hand-in Assignment	10/31/2023	5%	As described above in this course outline
COM 400: Capstone Simulation Performance	Group	Other	11/30/2023	10%	Final standing of your team in your industry (You will lose points if you do not treat the business as a going concern and instead sell off all/most assets)
COM 400: Capstone Simulation Final report to Board	Group	Hand-in Assignment	12/07/2023	15%	20 Page Final Report to Board of Directors (details above in this course outline)
<i>Total</i>				100%	

There will be no final exam.

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower, or unchanged grade.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Attendance and Participation: In this course participation will form 15% of your grade. Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning experience. Being an effective team member requires you to be present and engaged in the classroom environment.] Attendance is a critical component of everyone's academic success. Absence from the class sessions will negatively impact your grade.

The University of Victoria Calendar states: "Students are expected to attend all classes in which they are enrolled." Attending and participating in a class is an important part of the learning process in this course. In case you do have a valid reason to miss class, please let me know in writing (for absences occasioned for medical reasons, the required self-declaration form will be available on Brightspace), so that your absence will not be unexplained. Students with unexplained absences will be penalized typically by a loss of 1.5% of your total grade for each unexcused absence.

To document an excused absence (illness, injury, or family affliction), please submit the Gustavson self-declaration form to me. Appropriate documentation must be submitted immediately upon your return to classes (within 24 hours).

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment

deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

Daily Assignment Questions (“DAQs”): During the first part of the class, when we will be covering the Textbook chapters, we will have assignments that are straightforward and will count towards your class participation – you will be required to answer the “DAQ” in-class. I will provide more details of these questions in class. This part of the course will end with two in-class exams. Once the text chapters are completed and we are in the simulation part of the course, the daily assignment questions will address simple general questions from the business world or elsewhere.

CAPSIM Capstone Simulation Team Assignments:

1) Onboarding / Training– Each individual student needs to complete the onboarding / training to get ready for the simulation. This will ensure that you are ready to be a contributing member of your team.

2) Strategic Plan – In no more than **four typed, double-spaced pages** 12 point font (one plan per team), provide details of your company’s vision and intended strategy. Your strategic plan should include:

- The strategic objectives your company has set for itself (i.e., what is your strategy? What markets are you going to compete in? Where are your resources going to go?)
- a description of the markets you have chosen to pursue (traditional, low end, high end, performance, size) and how you intend to compete in each (i.e., your firm’s business level strategies)
- a summary of how you are going to structure the functional level strategies (R&D, production, marketing, financial, HRM) to support your firm’s strategy

3) Final Report to Board of Directors – Each team will maintain a record of its activities including such things as strategic postures taken, assumptions employed about competitors and the market, decisions made and the outcomes of those decisions, changes in strategy you deemed necessary, and so on. Based on this information, each team will report on its Capstone experiences in the form of a report to your company’s Board of Directors and Shareholders. Your Board Report is not intended to be an academic paper. Rather it should be a truthful document illustrating your company’s effectiveness to the Board of Directors and your Shareholders. The report should be **approximately 20 typed, double-spaced pages 12 point font** (not including attachments and appendices, which should not exceed 3 pages).

At a minimum, the Board Report should include:

- 1) your company’s initial strategy
- 2) a comparison of your emergent strategies with your initial strategy
- 3) an evaluation of your intended and emergent strategies within the context of the external environment’s opportunities and threats and your company’s internal strengths and weaknesses over time
- 4) an analysis of your markets and competition
- 5) a description of the key strategic decisions you made over time; why you made them; and how you implemented them.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, is not permitted in this course for students who wish to use them. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI.

GroupWork:

The purpose of group work is to enhance your skill in working collaboratively. When a group-based assignment forms part of your evaluation for a grade, all members of the group will receive the same grade. Any exception to this policy, such as adjustments for relative contribution, will be specified in writing prior to the grading of the assignment.

All members of the group will generally receive the same grade. However, an adjustment for relative contribution can be made, at the discretion of the instructor, if the remaining members of the group specify that one or more individuals did not participate in any meaningful way. This discretion may result in a student receiving a much lower grade than the other group members. At the end of the term, the group must complete an assessment which specifies what each person's contributions were to all group work during the class and the instructor shall take this into consideration when assigning grades.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. Please **note that "A" grades are normally achieved by a minority of students.**

Percentage Range	Grade s	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

"N" (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- Accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

Title	Individual or Group	Type (Case ,Example, Reading, Other)	Due Date (mm/dd/yyyy)	Description
COM 400: Read for class	Individual	Reading	09/07/2023	Chapter 1: Strategic Management and Strategic Competitiveness
COM 400: Read for class	Individual	Reading	09/12/2023	Chapter 2: The External Environment
COM 400: Read for class	Individual	Reading	09/14/2023	Chapter 3: The Internal Organization
COM 400: Read for class	Individual	Reading	09/19/2023	Chapter 4: Business Level Strategy
COM 400: Read for class	Individual	Reading	09/21/2023	Chapter 5: Competitive Rivalry and Competitive Dynamics
COM 400: Read for class	Individual	Reading	09/26/2023	Chapter 6: Corporate Level Strategy
COM 400: Read for class	Individual	Test	09/28/2023	Test 1(covers Ch. 1-6)
COM 400: Read for class	Individual	Reading	10/03/2023	Chapter 7: Merger and Acquisitions Strategies
COM 400: Read for class	Individual	Reading	10/05/2023	Chapter 8: International Strategy <i>Complete registration for Capstone!!</i>
COM 400: Read for class	Individual	Other	10/10/2023	Chapter 9: Cooperative Strategy
COM 400: Read for class	Individual	Other	10/12/2023	Chapter 10: Corporate Governance +Negotiation Exercise
COM 400: Read for class	Individual	Reading	10/17/2023	Test 2(covers Ch. 7-10)

COM 400: Read for class		Individual	Reading	10/19/2023	Introduction to CAPSIM;(Read Capstone Guide available online); Intro to CAPSIM metrics
COM 400: Read for class		Individual	Other	10/22/2023	Complete all onboarding training <u>before</u> class!
COM 400: Read for class		Individual	Other	10/24/2023	Practice simulation round1 (<u>we will process this in real time IN class</u>)
COM 400: Prepare for class		Group	Other	10/25/2023	Upload practice simulation round 2 (<u>note date of decisions for round is before class</u>)
COM 400: Prepare for class		Group	Other	10/30/2023	Upload COMPETITION round1(note date of decisions for round is before class)
COM 400: Prepare for class		Group	Other	11/01/2023	Upload COMPETITION round2(note date of decisions for round is before class)
COM 400: Prepare for class		Group	Other	11/06/2023	Upload COMPETITION round3(note date of decisions for round is before class)
COM 400: Prepare for class		Group	Other	11/08/2023	Upload COMPETITION round4(note date of decisions for round is before class)
COM 400: Prepare for class		Group	Other	11/20/2023	Upload COMPETITION round5(note date of decisions for round is before class)
COM 400: Prepare for class		Group	Other	11/22/2023	Upload COMPETITION round6(note date of decisions for round is before class)
COM 400: Prepare for class		Group	Other	11/27/2023	Upload COMPETITION round7(note date of decisions for round is before class)
COM 400: Prepare for class		Group	Other	11/29/2023	Upload COMPETITION round8(note date of decisions for round is before class)
COM400: Work on Final Paper		Group	Other	12/07/2023	Final reports to the Board are due by <u>by 4 pm (Pacific Time)</u> .

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the [Centre for Accessible Learning \(CAL\)](#) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



Gustavson
School of Business
University of Victoria

COM 402(A01)

Legal Issues in Management

Fall 2023 Course Outline

Note: please regularly check your Brightspace site and subscribe to Brightspace Announcements for course updates and changes.

Introduction

Welcome to Legal Issues in Management. This course is very relevant to success in business.

Textbook

Contemporary Canadian Business Law, Principles and Cases, Willes, John A., Q.C., and Willes, John H., 12th e-book edition available from bookstore. Hardcopy editions by the same author from any source are also recommended and very good value. Please cite the 12th edition if you reference the textbook in coursework or project work..

Course Objective

From the *University of Victoria Calendar*:

"This course examines several aspects of commercial law that are particularly relevant to those who own, manage, or are employed by a business enterprise. Subjects that will be addressed include common law doctrines (such as contract and negligence), legislation (such as the Employment Standards Act and the Company Act) and other legal principles that affect business decision making in a global environment."

This course is primarily concerned with law as it affects business. While there is no self-contained law of business, the course will examine areas of law which impact business. Principal topics include, an introduction to the Anglo-Canadian system of law, the law of tort and negligence, including professionals' liability, the law of contract, the law of principal and agent, the law of employment. Within the above, we will consider the differences which result from the choice of legal form of business, whether it be sole proprietorship, partnership or limited partnership, corporation or trust. The respective liability of the principals of each form of business will also be considered.

Methodology

Instruction will principally consist of class lectures and discussion on each topic supported by questions posed to the class. It is essential that students read ahead in order to be able to follow the content and participate in practice questions and discussions. There will be a practice quiz with a worked solution approximately 12 October (one week prior to the mid-term quiz provisionally scheduled for 19 October 2023). Evaluation dates are subject to change. Please do not make plans to be absent from the classes scheduled before and after the provisional mid-term exam date.

Detailed chapter notes, power point slides, example handouts and other materials will be posted in advance in Brightspace.

As part of the participation in the course, teams of four students will be assigned a legal case to brief in written form according to a method provided. In October 2023, according to a schedule, the cases will be presented in class demonstrating understanding of "case brief" format used for judicial decisions. All necessary information will be provided. No research is required or should be undertaken in the exercise.

In November, teams of seven students will argue and judge a hypothetical, legal dispute in contract and agency. This will also take place in class, according to a schedule determined in mid-October.

Participation in other forms and by other means, such as contribution to discussion questions, assistance to class members, *et alia*, will be encouraged and acknowledged. Other evaluations include a final quiz to be scheduled in the December Exam Schedule period. As this date will not be known until after the Reading Break, please do not make travel plans for December prior to the date being confirmed by the University.

Equity, Diversity and Inclusion

Equity, diversity and inclusion are core values at the University of Victoria.

At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in- person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture.

We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Evaluation

Student grades in COM 402 will be determined on the basis of performance in the following assessments. See schedule of dates (pp. 15-17 below).

1. A case presentation exercise in teams of 4. Presentations involve 8-10 minutes spoken presentation in October (schedule to be determined).
20% of final mark
2. An in-person, mid-term quiz provisionally scheduled for 19 October 2023
25% of final mark
3. A contract-themed, legal dispute presentation in teams of 7 in the style of a Moot
25% of final mark in-class during the last two weeks of November 2023 (schedule to be determined).
4. A final examination during the December Examination Period
30% of final mark

Total: 100%

You must complete all graded components for this course unless you are excused. Failure to complete all components will result in a grade of N.

Additionally, there is an attendance requirement. See below, page 8.

Failure to meet the attendance requirement without the written permission of the Undergraduate Academic Director in respect of a major, extenuating circumstance will cause you to be excluded from the final examination with the result that your final grade is N (Incomplete, fail and GPA of 0).

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Case Presentation Exercise

In September, students will be invited to form groups of four students either themselves or on the basis of the instructor's random assignments. Each group will be given a trial or appeal court decision to present. Following a format which will be explained, each group must brief the case and then present the legal decision according to the format explained. Case presentations will take place in class according to the schedule in October 2023.

Case briefs summarise the essential elements of a case, including its procedural history (the path of the dispute through the legal system), the relevant facts, the legal issues for resolution by the court, the decision reached by the court and, most importantly, the reasons for decision.

In addition, groups are expected to comment upon the impact of the decision on business. By this is meant the impact the decision is likely to have on business or industry having particular regard to the functional areas of marketing, accounting, finance and human resources management. For example, what will be the implication on personnel practices, marketing policies, management information systems, financial strategies etc.

Group case presentations should take approximately 8-10 minutes and involve each member of the group in a speaking role. The written case brief must be submitted to the Brightspace dropbox before the presentation and indicate the part or parts contributed by each member.

This is a group project and each member of the group will receive the grade of the group.

Mooting Exercise - Court Simulation

Also, in September, students will be invited to form different groups of seven students themselves or on the basis of the instructor's random assignments. Two students in each group will assume the role of "Counsel for the Plaintiff", two students "Counsel for the Defendant", and the remaining members of the group will be a presiding judge, a time-keeping judge and an assistant judge.

Following a method to be explained, teams of counsel within each team will prepare their respective positions in the moot exercise for oral presentation in class. These presentations will take place in the final two weeks of the course in November.

Background information will be provided in mid-October. Counsel for the Plaintiff and Counsel for the Defendant must upload to Brightspace in a designated area, a copy of their moot brief document. The moot brief is a jointly-written brief of between 3 and 5 pages summarizing Counsels' position on the issues. A template for use will be provided in October.

Immediately prior to the commencement of each moot, written copy of each team's moot brief will be provided to opposing counsel and also provided to the judges for use during the moot presentation.

During the moot, the Judges will listen to the argument of each team of legal counsel and after having done so deliver a judgment on the issues. The Judges should deliver an immediate oral decision. Later, a written decision of between 3 and 5 pages will be jointly written by the judges. The written decision need not be identical with the oral decision. When written, the judges' decision will be uploaded to Brightspace.

The moot briefs and judges' written decisions will be graded using some or all of the following criteria: quality and merit of legal argument, creativity, organisation, clarity and appropriate citation of case or statute. To assist the judges in this task, there will be a "judges' coaching session" in November. For all participants, full information will be provided in class to explain effective strategies and techniques to use.

This is an individually assessed exercise.

Course Experience Survey

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be expected to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey; you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the course, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment Group Work

At the Gustavson School of Business team projects and assignments are an integral component to student learning.

It is an expectation that students contribute equitably to all team assignments. In order to receive an individual grade, individuals must participate in their team process to produce a team assignment.

Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility.

It is not acceptable for a team member to allow another team member to fulfill their work for them or for a team member to appropriate the work of the other team member(s) or prevent the other(s) from making their own contribution(s).

To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.

What To Do If There Is A Problem In Your Group

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Attendance and Participation

Regular attendance is an expectation of the Bachelor of Commerce Program. There is an attendance policy that will result in exclusion from the final examination if violated (see immediately below).

Attendance in every class is an expectation for COM 402. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Attendance Policy

This policy does not apply to absence due to illness, injury, personal affliction, family responsibilities, job interview or similar about which you advise me via e-mail prior to the cause or as soon as you are able: < MarkBridgeCommerce@uvic.ca >

In particular, if you or your family are not well, please stay at home and take care of yourselves until you recover. I will be more than happy to assist you with missed content.

This policy does apply to voluntary absences that have no justification other than personal choice to be absent.

In cases of absence of any six scheduled class times during the term (other than situations described above and other than class times where an in-class team presentation does not require your presence), you will be denied permission and excluded from writing the final examination unless you obtain the written permission of the Undergraduate Academic Director for a major, extenuating circumstance.

The consequence of missing the final examination is a course grade of N(incomplete, fail and GPA 0).

Use of Artificial Intelligence (AI)

Use of AI generated content, created or obtained directly or indirectly, is prohibited in the course.

In the United States, recent use of AI by trial lawyers who claimed not to know what it was, have resulted in judicial admonishment (ie public humiliation) and citation (ie referral) to disciplinary bodies for investigation and response.

Unattributed use of AI is a form of academic dishonesty for purposes of university policy. It is not permitted to use AI, whether attributed or not, in this course.

See the explanation at points c and d, page 12, below, for instruction on proper research, citation and attribution in a law course. Please ask for assistance if you are in any doubt. You will never be faulted for citing and attributing ideas to original (not artificial) sources of law, including any law contained within the adopted textbook for the course.

Missed Coursework, Team Work or Examinations

As explained, above, you must complete all graded components for this course unless you are excused. Failure to complete all components will result in a grade of N.

If you face unexpected circumstances that interfere with your academic obligations or success in the course, you must seek advice from a BCom Advisor or your instructor as soon as possible.

Grading Scale

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades.

Please note that “A” grades are usually achieved by a minority of students.

Percentage Range	Grades	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
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65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
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“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

University Calendar

Students are encouraged to read the regulations applicable to the course found in the *University of Victoria Calendar*.

Attendance

The University of Victoria Calendar states that "Students are expected to attend all lectures in each course for which they are enrolled". Regular attendance and preparation will enhance students' contribution and success in the course.

Assistance with your work

If a student intends to seek help or receives help from anyone on any coursework that will be evaluated in this course (ie help from another student, a tutor or anyone), **you must get my permission in advance to submit that work for evaluation.** Failure to do so will be treated in accordance with the university and faculty policies on plagiarism.

Academic Integrity, plagiarism and cheating

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- a. using work prepared by any form of artificial intelligence service, such as ChatGPT.
- b. using the exact words of a published or unpublished author without quotation marks and without referencing the source of the words.
- c. In law, a required reference must include the full name of the author, the full name of the work, the year of publication, the page cited with the full text quoted within quotation marks. If, as is not uncommon, words are omitted, then “elipses” must be used to show the omission of the words in the original text.
- d. For greater certainty, it is not sufficient to paraphrase original text and simply insert a citation of the type “ (Green, 2015) ”. Examples of correct citation will be provided in class. If in doubt, please ask before assuming that a form of citation acceptable in another context is sufficient in law.
- e. paraphrasing a published or unpublished author without referencing the source.
- f. Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- g. Paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g., personal communication, ideas from a verbal presentation) without referencing the source.
- h. Copying the answers of another student in any test, examination, or take-home assignment.
- i. Providing answers to another student in any test, examination, or take-home assignment.
- j. Impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- k. Stealing or mutilating library materials.
- l. Accessing a test or examination prior to the time and date of the sitting.
- m. Changing the name or answer(s) on a test after that test has been graded and returned.

- n. Submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

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Students should be aware of the expectations surrounding their professionalism.

Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Group Projects and Group Work

Students should be aware that group projects are subject to the same rules regarding academic dishonesty. Because of the unique nature of group projects, all group members should exercise special care to ensure that the group project does not violate the policy on Academic Integrity. Should a violation occur, group members may be held jointly accountable unless the violation can be attributed to a specified individual or individuals.

Some courses, while not requiring group projects, encourage (or at least do not prohibit) students to together in groups before submitting, *inter alia*, individual assignments. Students are encouraged to discuss this issue as it relates to academic integrity with their instructor to avoid violating this policy.

For the Moot Exercise individual team members are encouraged to work with members of the class who are on teams other than their own. This collaboration is expected and is not a violation of academic integrity provided that the final result is the original work of the person submitting it for evaluation and assessment.

Class Time and Office Hours

COM402 A01 meets on Tuesdays and Thursdays from 4.30 to 5.50 p.m.

Office hours are available by arrangement at a time that is mutually convenient to you.

You are very welcome to e-mail me for direct assistance at any time. My email is **MarkBridgeCommerce@uvic.ca**

Respect

Students with diverse learning styles and needs are welcome in this course. In particular, If you have a disability / health consideration that may require accommodations, please feel free to approach me or the [Centre for Accessible Learning \(CAL\)](#) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

Somewhere in this outline is an expression meaning “something for something”. If you are the first member of the class to locate the expression, you will win a very nice item of Gustavson “bling”. To claim the prize, go to Brightspace and send a class-wide e-mail to everyone in the class using the dropdown “Class List”. The subject line of the e-mail must read “I claim the COM 402 - A01 Course Outline prize”. In the body of the e-mail, type the following and enter the page and line number where you have located the expression meaning “something for something”. In particular, type the following message inserting the page and line number in place of the variable letters “X” and “Y”: “I located the winning expression in the Course Outline contest on page X at line Y, and I claim the Gustavson prize for section A01.” In addition to sending the e-mail to the whole class, forward your “sent” message to the course instructor at <MarkBridgeCommerce@uvic.ca> to show the time and day of your message. Good Luck to all. The winning class member will be the first person to send the class-wide e-mail as time- stamped by Brightspace and the prize will be awarded in a future class.

Reading, Topics List and Important Dates (dates approximate).

Dates subject to change	Topics and Activities
07 September	<i>Introduction to the course. Introduction to Canadian Law: Sources of Law of Law, Relevance to Business; Forms of Business Organisation: Types of Property: Real and Personal; Protection of Intellectual Property, Text Chapter 1, online materials and discussion.</i>
08 September	Instructions posted for 4-person Case Presentation Team Requests and 7-person Moot Team Requests via Brightspace.
08-15 September	4-person Case Presentation Team Requests due by noon on 15 September. In absence of a request, teams will be formed at random from the class.
12 September	(Continuing) <i>Introduction to Canadian Law: Sources of Law of Law, Relevance to Business; Forms of Business Organisation: Types of Property: Real and Personal; Protection of Intellectual Property, Text Chapter 1, online materials and discussion.</i>
16-22 September	7-person Moot Team Requests of 7 class members due by noon on 22 September. In absence of a request, teams will be formed at random from the class.
18 September	Case Presentation information and exercise instructions will be posted to Brightspace.
19 September	<i>Introduction to Canadian Law, as above (continued). Relevance of Environmental Law; International Law as applicable to domestic and international business; Law of Employment, Labour Law, Text Chapters 1.</i> Further optional reading: Chapters 19, 20, 34 and 35.
21 September	<i>Hierarchy of Law: Constitutional Law, Common Law and Statute; Judicial Process, Alternative Dispute Resolution, Text chapters 2 and 3.</i>
26 September	<i>Tort Law: Civil Liability compared to Criminal Liability; Intentional and unintentional tort; Defences and vitiating circumstances, tort remedies, use and protection using insurance, Text Chapters 4 and 5. Further optional reading Chapter 31.</i>

30	September	Moot Presentation Team List and Schedule will be posted to Brightspace.
03	October	<i>Tort Law (continued).</i>
09	October	Thanksgiving Day – no classes
10	October	<i>Tort Law (continued). Torts arising in Business; Professional Negligence: Duty of Care, Standard of Care and Causation, Text Chapters 4 and 5. Further optional reading Chapter 6.</i>
12	October	Practice Quiz posted to Brightspace with solution
13	October	Optional Mid-Term Review Class (location and time to be confirmed)
17	October	<i>Tort Law (continued).</i>
19	October	Mid-term Quiz (provisional date subject to change)
24-26	October	In Class Presentations according to team schedule on Brightspace
31	October	<i>Contract Law: Elements of Contract and Proof; Defences and vitiating circumstances; Chapters 7, 8, 9 and 11.</i>
02	November	<i>Contract Law(continued) Elements of Contract and Proof; Defences and vitiating circumstances; Chapters 7, 8, 9 and 11.</i>
07	November	<i>Contract Law (continued): Elements of Contract and Proof; Defences and vitiating circumstances; presence or absence of quid pro quo; Chapters 7, 8, 9 and 11.</i>
13-15	November	Reading Break - No Class
16	November	<i>Agency: Appointment and use in Contract, Text Chapter 15, Legal and Equitable Remedies, Quantum Meruit and Promissory Estoppel, Text Chapters 8 and 14.</i>
21-30	November	Moot Exercise presentations according to team schedule on Brightspace
04	December	Optional Final Exam Review Class (location and time to be confirmed)

TBA December

Final Examination (date to be confirmed by University)

Note: Time permitting, the importance of the following topics will be discussed when arising but will not be examined:

Sale of Goods, Consumer Protection Law, Business Organisation: Creation, Liability of Officers, Shareholder Limited Liability and Shareholders' Agreements Banking, Secured Transactions, Negotiable Instruments: Promissory Notes, Cheques and Bills of Exchange. Intellectual Property: Creation and Enforcement, Patents, Trademarks, Copyright, Industrial Design and Contractual protection of intellectual property.

Mark Bridge

28 August 2023

Typographical mistakes corrected 3 September 2023



COM 410

Leadership Strategies Fall

2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.

Course Time:	A01: Tuesday, 6:30 p.m. – 9:20 p.m.
Location:	Room C112, David Strong Building
Instructor:	Dr. Jim Swaffield
Office hours:	Swaffield
Telephone:	Virtual office hours by appointment
Email:	jimswaffield@uvic.ca
Office:	BEC 439

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Introduction:

Hello! Welcome to COM 410 Leadership Strategies. My name is Jim Swaffield. I have worked as a consultant and professor for the past 25 years. I also have an MBA and a PhD in evolutionary psychology. My area of research examines how different types of environmental stressors affect human behavior. This line of research is relevant to consumer behavior, employee behavior, as well as management and leadership behavior. If you are interested in learning more about my background, please see my website at <https://www.jimswaffield.com/>.

I am confident that you will find this course interesting and thought provoking. I look forward to sharing the field of leadership with you.

Dr. Jim Swaffield

Texts and Resources:

Northouse, P. G. (2022). *Leadership: Theory and practice*. SAGE. (Required)

Course Objectives and Description:

This course is designed to provide a basic introduction to leadership by focusing on what it means to be a good leader. Emphasis in the course is on the practice of leadership. The course will examine topics such as: understanding leadership; recognizing leadership traits; engaging people's strengths; understanding philosophy and styles; attending to tasks and relationships; developing leadership skills; creating a vision; establishing a constructive climate; listening to out-group members; handling conflict; addressing ethics in leadership and overcoming obstacles. Students will assess their leadership traits and skills to improve their own leadership performance.

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Equity, diversity, and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title	Individual or Group	Due Date	Weight
1. Midterm Exam	Individual	Tues. Oct 24	30%
2. Personal Leadership Portfolio	Individual	Tues. Nov 28	30%
3. Final Exam	Individual	TBA	40%
Total			100%

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite (with reference to the theory taught or the marking rubric) why you think an error has been made. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Experience Survey:

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Personal Leadership Portfolio

After each chapter in the course textbook is a questionnaire that relates to an area of leadership.

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Attendance and Participation:

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Missed Coursework or Assessments:

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Disability Accommodations

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Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that “A” grades are normally achieved by a minority of students.**

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77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
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Academic Integrity:

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Tues. Oct 17	8. Transformational Leadership 9. Authentic Leadership	Chapter 8 Chapter 9
Tues. Oct 24	Midterm Exam 10. Servant Leadership	
Tues. Oct 31	11. Adaptive Leadership	Chapter 10 Chapter 11
Tues. Nov.14	Reading Week – No class	
Tues. Nov07	12. Inclusive Leadership 13. Followership	Chapter 12 Chapter 13
Tues. Nov21	14. Gender and Leadership	Chapter 14
Tues. Nov28	15. Leadership Ethics 16. Team Leadership	Chapter 15 Chapter 16



COM 410

Leadership Strategies Fall

2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.	
Course Time:	A02: Tuesday and Thursday, 1:00 p.m. – 2:20 p.m.
Location:	Room C112, David Strong Building
Instructor:	Dr. Jim Swaffield
Office hours: Telephone: Email:	Swaffield Virtual office hours by appointment jimswaffield@uvic.ca
Office:	BEC 439

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Thurs. Sept 14	2. Trait Approach	Chapter 2
Tues. Sept 19	3. Skills Approach	Chapter 3
Thurs. Sept 21	4. Behavioral Approach	Chapter 4
Tues. Sept 26	5. Situational Approach	Chapter 5
Thurs. Sept 28	6. Path–Goal Theory	Chapter 6
Tues. Oct 03	7. Leader–Member Exchange Theory	Chapter 7
Thurs. Oct 05	8. Transformational Leadership	Chapter 8
Tues. Oct 10	9. Authentic Leadership	Chapter 9
Thurs. Oct 12	10. Servant Leadership	Chapter 10
Tues. Oct 17	10. Servant Leadership	Chapter 10
Thurs. Oct 19	11. Adaptive Leadership	Chapter 11
Tues. Oct 24	Midterm Exam	
Thurs. Oct 26	11. Adaptive Leadership	Chapter 11
Tues. Oct 31	12. Inclusive Leadership	Chapter 12
Thurs. Nov 02	12. Inclusive Leadership	Chapter 12
Tues. Nov 07	13. Followership	Chapter 13
Thurs. Nov 09	13. Followership	Chapter 13
Tues. Nov. 14.	Reading Week – No Class	
Thurs. Nov 16	14. Gender and Leadership	Chapter 14
Tues. Nov 21	15. Leadership Ethics	Chapter 15
Thurs. Nov 23	15. Leadership Ethics	Chapter 15
Thurs. Nov 28	16. Team Leadership	Chapter 16
Thurs. Nov 30	Wrap-up Class	



COM 426 (A01) **Management Accounting II**

Fall 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.	
Course hours (Pacific)	6:30 pm to 9:20 pm (Wednesdays)
Location	DSB C122
Instructor:	Jennifer Reed, MEd, CPA, CA
Office:	Zoom Link
Office hours:	<i>ZOOM Hours: By appointment over ZOOM. I am also happy to meet with students before, during or after class</i>
Email:	jereed@uvic.ca

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Introduction:

My name is Jennifer Reed and I am excited to be your instructor this term. I graduated from the University of Victoria with a Bachelor of Science in Economics and after completing the Chartered Accountancy (CA) program, I obtained my Chartered Accountant (CA) designation in 2006. I recently completed a Master of Education degree with a focus on curriculum and instruction through Simon Fraser University in 2020.

I currently work as a Director for CPA Canada where my team is responsible for the design and delivery of accurate and high-quality Preparatory course and Professional Education Program (PEP) module materials designed to prepare candidates for successful careers as CPAs in Canada.

Prior to joining CPA Canada, I worked as an audit manager with KPMG working on a variety of both for-profit and not-for-profit audit clients. I also worked for three years as the Director of Finance for a local municipality, and as a Director for the legacy Chartered Accountancy School of Business in Western Canada.

My true passion is teaching, and I have taught financial accounting, audit and assurance and management accounting to students since 2010. I recognize that some of you may be taking this class out of interest, while others may be in attendance because of a program requirement. Regardless of your reason for being here, I hope that you come away from this course with a better understanding of the role that management accounting plays in the professional world.

Please do not hesitate to reach out to me for any questions or clarification as we progress through the term!

Texts and Resources:

Horngren's Cost Accounting: A Managerial Emphasis, Ninth Canadian Edition, 9th edition (Srikant M. Datar, Madhav V. Rajan, Louis Beaubien, Steve Janz) ISBN-13: 9780136558217

Pearson my Lab is not required.

Course Objectives and Description:

This course is a continuation of Commerce 316/317, which introduced management accounting. It is designed to be transferable and satisfy the requirements of other second-level management accounting courses and the requirements of the CPA program. It should also assist the general manager who needs to know more about how accounting information is useful in making daily business decisions.

Major topics covered include the terminology and objectives of management accounting, flexible budgets, variances, variable and absorption costing models, cost allocation decisions, joint and byproduct costing, process costing and transfer pricing. Problem-solving and decision-making skills will be practiced through the use of problems and case studies.

As specific learning outcomes, students who successfully complete this course will be able to:

- Prepare and analyze a Cost of Goods Manufactured and related Income Statement
- Understand and apply the various types of cost definitions (fixed, variable, mixed, direct, indirect, period, product) when constructing budgets
- Prepare flexible budgets
- Understand and compute variances
- Understand and calculate variable and absorption costing problems
- Analyze, determine, and complete cost allocations
- Understand and calculate joint and by-product costs
- Understand and calculate process costing
- Understand and compute various pricing decision models.
- Develop confidence in sharing ideas and thoughts in a safe environment to develop critical thinking and analysis skills

Course Format:

This course will be delivered primarily in person (please refer to the Schedule Summary for any classes that are noted as being delivered online via Zoom).

Each class will be used to review the topic content and work on problems, cases and a real-world case study related to the topics taught.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: Zoom, Pearson MyLab (optional). I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at:

<https://zoom.us/privacy>
<https://www.pearson.com/ca/en/legal/privacy-statement.html>

I encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type	Due Date (Pacific)	Weight / %of grade	Description
COM 426:Quizzes	Individual	Hand-in Quizzes written in Brightspace (5 quizzes; lowest mark dropped)	Throughout the term	12%	These short quizzes will be administered throughout the course. They will cover the current week or prior week's content.
COM 426: Midterm #1	Individual	Online Timed Exam written in person	October 18 at 6:30pm Pacific	30%	Combined short answer and MCQ exam to be completed in90minutes via BrightSpace
COM 426: Midterm #2	Individual	Online Timed Exam written in person	November 22 at 6:30pm Pacific	30%	Combined short answer and MCQ exam to be completed in90minutes via BrightSpace
COM 426: Case Study	Individual or Group	Hand In	Due Friday, December 3 at 11:55pm Pacific	28%	Individual or group (maximum of 3) written submission to be submitted via BrightSpace
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Description of evaluation standards for evaluation elements.

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of 50% for each day an assignment is late. An assignment is considered late if it is submitted more than 30 minutes after the stated deadline.

This penalty does not apply to midterm exams, which are not accepted late for any reason whatsoever. If a student exceeds the time limit specified for a midterm exam beyond the 1-minute grace period, a grade of zero will automatically be assigned.

Attendance and Participation: The University of Victoria Calendar states: “Students are expected to attend all classes in which they are enrolled.” Attending and participating in class is an important part of the learning process in this course. Participation exposes you to material not in the readings, to your classmates' insights and helps clarify material that can lead to better performance in the course.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations.

Use of Artificial Intelligence (AI): In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. In this course, the use of AI tools including ChatGPT is not permitted on take-home assignments or assessments.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades.

Please note that “A” grades are normally achieved by a minority of students.

Percentage Range	Grade s	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student’s record in the Registrar’s office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

Schedule Summary:

IMPORTANT: Subject to change- referto Brightspace weeklycontent

Unit	Date	Topics	Details	Details
1				
	Wednesday, September 6	The Accountant's Vital Role in Decision Making		Handout 1
2				
	Wednesday, September 13	A Review of Cost Terms and Purposes		Handout 2
3				
	Wednesday, September 20	Job Costing		Handout 3
		Brightspace Quiz #1 worth 5%	Available until Sunday, September 24 at 11:55 PM (Pacific)	
4				
	Wednesday, September 27	Process Costing		Handout 4
		Brightspace Quiz #2 worth 5%	Available until Sunday, October 1 at 11:55 PM (Pacific)	

Unit	Date	Topics	Details	Details
5				
	Wednesday, October 4	Process Costing continued Spoilage, Rework, and Scrap		Handout 5
6				
	Wednesday, October 11	Flexible Budgets, Variances and Management Control		Handout 6
		Brightspace Quiz #3 worth 5%	Available until Sunday, October 15 at 11:55 PM (Pacific)	
7				
	Wednesday, October 18			
		MIDTERM 1 written in person through Brightspace	Course start to date cumulative mid-term. Estimated time of 90 minutes.	
8				
	Wednesday, October 25	Flexible Budgets, Variances and Management Control continued		Handout 7
9				
	Wednesday, November 1	Pricing Decisions		Handout 8

Unit	Date	Topics	Details	Practice Questions
10				
	Wednesday, November 8	Transfer Pricing and Cost Allocation–Joint Products and By-products		Handout 9
		Brightspace Quiz #4 worth 5%	Available until Sunday, November 12 at 11:55 PM (Pacific)	
11				
	Wednesday, November 15	Reading Break		
		Brightspace Quiz #5 worth 5%	Available until Sunday, November 26 at 11:55 PM (Pacific)	
12				
	Wednesday, November 22			
		MIDTERM 2 written in person through Brightspace	Course start to date cumulative mid-term. Estimated time of 90 minutes.	
13				
	Wednesday, November 29	Open classwork on case study		
		Case study due	Upload to Brightspace dropbox by Sunday, December 3 at 11:55 PM (Pacific)	



Gustavson
School of Business
University of Victoria

COM 450

As the topics change every year, there is no available course outline for this course.



ENT 100(A01/A02)

Introduction to Entrepreneurship

CRN11470 & 11471
Fall 2023 Course Outline

Note: please check our Brightspace course site frequently for new updates and course changes.

Course hours:	Mondays and Wednesdays A01 - 3:00 - 4:20pm A02 - 4:30- 5:50pm
Location:	DSCB C112
Professor:	Dr. Claudia Smith
Office:	BEC 264
Office hours:	Before/after class, or by appointment on zoom or in-person
Email:	smithcg@uvic.ca

We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Introduction:

I look forward to working with you this term as we explore many facets of entrepreneurship. Whether you are joining the course because you already are an entrepreneur, know you want to be an entrepreneur or because you are simply curious about the topic, you are in the right place. My plan is to deliver a dynamic course experience this fall that challenges how you think about the world around you, and one that helps you to be ready to be innovative in seeing opportunities and solving problems. I've also intentionally created a course experience that helps you to meet new people, develop teamwork skills, and challenge your tolerance for ambiguity and uncertainty.

Together, we will help you develop an individualized entrepreneurial mindset. I'm excited to get started learning together this term!

Texts and Resources:

There is no assigned textbook for this course.

Two specific readings are mandatory –the Business Model Canvas and the Value Proposition Canvas. Links are provided on Brightspace.

Weekly suggested readings are also posted to Brightspace. You are free to choose what to read but completing many readings is part of the course requirement. Plan to read at least one article from the weekly readings list each week. You are also encouraged to find and read additional materials on entrepreneurship and innovation that support your own interests.

What you take away from **ALL** readings completed in this course should be woven into your final assignment, Assignment #5. It is not possible to attain an A-level grade in this course without augmenting your thinking and analysis with a wide variety of readings. The more readings you integrate into your final assignment, the stronger it will be.

Course Objectives and Description:

This course will provide you with an introduction to the theory and practice of entrepreneurship and to key principles of innovation. Through a variety of delivery methods including lectures, workshops, interactive assignments and panel discussions with guest speakers, you will explore the key elements of the Business Model Canvas – an important tool that fosters venture readiness. You will have an opportunity to hone your skills in entrepreneurial thinking including opportunity recognition, opportunity evaluation, value proposition development, and product concept creation. You will also explore some of the key requirements and concerns with setting up a new venture including how to select a winning team, how to get buy-in, how to form a business, how to protect your ideas, and how to fund it all. Emphasis will also be placed on helping you learn about resources available to support student and early entrepreneurs in Victoria and beyond.

A core principle of this course is to bring the theory we discuss into focus by hearing and learning from entrepreneurs who have started, grown and/or exited their ventures. Through a series of guest speakers and panel discussions, entrepreneurs will share with us their experiences and insights from the front line – the good, the great, the bad, and the ugly.

Our course goals aim to:

- Inspire students to the possibilities of entrepreneurship regardless of their chosen career path
- Develop a broad understanding of the key elements of venture startup and innovation
- Create a shift in mindset towards opportunity recognition and entrepreneurial thinking
- Familiarize students with the Business Model Canvas as an organizing tool for turning good ideas into viable businesses
- Expose students to the broad experiences and tacit knowledge of a variety of entrepreneurs
- Introduce the principals of value proposition formation and detailed development
- Enhance persuasive communication and presentation skills
- Foster students' critical thinking, analytic, and synthesis skills in general, and as specifically applied to entrepreneurship
- Integrate students' personal, education and career goals into coursework to build relevance and impact
- Increase awareness of the resources available to help nascent entrepreneurs start new ventures.

Course Format:

Course material will be delivered through a variety of modes, including:

- Lectures
- Mini in-class workshops
- Class discussions
- Case studies
- Panel discussions with entrepreneurs
- Panel discussions with topic experts

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take

place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology

I may use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

Currently, we will not be using any educational technologies which store or access your personal information outside Canada. I will let you know if this changes during the duration of our course. Should the situation change and you are not comfortable with your personal information being stored outside of Canada, please speak to me about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

A variety of new AI tools are available to help learners and educators. These tools are here to stay. We will need to learn how best to use them. There are a series of ways in which AI tools could be effectively employed in this course and these will be discussed in class. However, work generated by AI needs to be transparently cited as work that you did not do. For this course, if you use AI tools to help complete an assignment, you will need to clearly indicate under sources/references in our assignment what AI-generated material you used either directly or indirectly. Failure to clearly indicate how and where you used/applied AI tools will put your assignments in breach of university ethical and plagiarism guidelines that could result in failure of the assignment or course. Please see page 5 of this outline for further AI-related guidelines. Also, please keep in mind the following:

- If you provide minimum-effort prompts, you will get low-quality results. You will need to refine your prompts in order to get good outcomes. This will take work.
- Don't trust anything AI tools deliver. If you are looking at AI-generated numbers or facts, assume they're wrong unless you either know the answer or can check with another source. You will be responsible for any errors or omissions in your assignments. AI-generated materials work best to augment topics you understand.
- ChatGPT and other AI tools can 'hallucinate' and manufacture fictitious citations. For example, they use real journal names and real scholar names, and creates **fake** article titles with **fake** publication dates and **fake** page numbers. You should double-check/triangulate whatever citations and scholars ChatGPT and other AI tools mention.

Evaluation Elements:

The majority of assignments for ENT 100 are due later in the term, when you have learned key concepts and can apply them. This means that you will want to be sure to plan your schedule wisely. The term typically gets busier and busier for most students across all courses. Keep this in mind. You can start ANY of the assignments in ENT 100 early and develop them over time as you progress in the course. Start early and iterate during the term on drafts of your assignments. This is a secret to success. You are unlikely to be successful trying to pull off completing an assignment in one day or one weekend. Others have tried, my advice is that it usually does not end well.

PLAN AHEAD to successfully complete your assignments on time to avoid penalties. Students will be evaluated according to the following schedule:

ENT 100	Individual or Group	Type	Due Date	Weight	Description
Assignment 1: Interview	Individual	Class Hand-in Assignment	Sept 27, 2023 Beginning of class	10%	500wordLIMIT
Assignment2:Class Exercise	Group	Class Hand-in Assignment	Oct 16, 2023 Beginning of class	10%	Details TBA
Assignment 3: Idea Journal	Partners	Class Hand-in Assignment	Nov 1, 2023 Beginning of class	20%	8page LIMIT
Assignment 4:Pitch-it Video	Individual	Submit to Brightspace	Video due: Nov 20, 2023 beginning of class And Assessments due: Nov 22, 2023 beginning of class	15%	90second video 2peer assessments
Assignment 5: Connections and Reflections Portfolio or Business Model Canvas	Individual	Hand-in Assignment unless otherwise approved by Claudia in advance	Dec 4th, 2023 Beginning of class	35%	Document-10 page LIMIT Other formats to be pre-approved by Claudia
Participation	Individual	In-class	ongoing	10%	Note that your participation grade is EARNED through thoughtful contributions to class discussions and activities
Total				100%	

Note: You will find detailed assignment descriptions and evaluation criteria posted to Brightspace in three places: in the week it is assigned, in the week it is due, and under the “assignments” tab within Course Tools.

Please do not ask for a review of your graded assignment for 4 business days after receipt of your grade. If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to describe why you think that your assignment deserves a different grade based on your work, relevant course materials, and the assignment’s grading rubric. Note that I will review your assignment in its entirety, not just the portion in question, and that the review may lead to a higher, lower, or unchanged grade.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Description of evaluation standards for evaluation elements:

Assignments: You will find a detailed grading rubric for each assignment at the end of each assignment description posted to Brightspace. Additional questions should be brought to my attention either during class time, by email, or during scheduled meetings.

Group Work:

Given the difficulties that many students encounter trying to coordinate schedules, group work has intentionally been kept to a minimum to improve your course experience. There is, however, one larger group assignment (Assignment 2), and a partner assignment (Assignment 3). For these assignments, students are expected to work together safely respecting health guidelines, to participate equally, and to share equitably in the workload. There will be no tolerance of social loafing behaviour. As your instructor, I reserve the right to lower a student's grade by one or more letter grades should the student not contribute equally or equitably to all the team's tasks related to an assignment. If I become aware that a student's contribution to a shared assignment has been minimal (less than their reasonable share), I reserve the right to assign a percentage grade of 0% on that assignment, and to drop the student's participation grade to 0%. This reflects my expectation that all students in ENT 100 will work together effectively and contribute in an equal or equitable way to their joint assignments. If problems arise in your group with respect to group dynamics or social loafing, please notify me sooner rather than later, either in person or by email.

At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#).

Failure to meet these expectations may result in being removed from the program or other academic penalty."

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss the problem with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with Dr. Smith.
3. If still unresolved, then escalate to the BCOM Program Director for an initial meeting and further investigation, as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of a minimum of 5% for each day an assignment is late. If you will be handing an assignment in late, please let Dr. Smith know in advance, when possible.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, are permitted in this course for students who wish to use them. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should also indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI. If you are not sure how to correctly reference your use of AI tools for any ENT 100 assignment, ASK! Transparency in your process is critical to ensure that you do not breach academic standards.

Attendance and Participation: The University of Victoria Calendar states: "Students are expected to attend all classes in which they are enrolled." Attending class is a critical part of the learning process in ENT 100. This cannot be overstated for this course! Being present in class will ensure exposure to course concepts that will prove invaluable for your success in this course. Your positive participation will contribute to your own and classmates' learning, and enhance our learning environment. Being present in class exposes you to core material not found in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning experience. Being an effective team

member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Core components of this course are panel discussions, and guest speakers. You cannot benefit from the insights entrepreneurs and source experts share with us, or ask pertinent questions of them unless you are present. In addition, you are asked to work together with your peers during class time to effectively discuss key concepts, challenge assumptions, and further understanding. Most key learning outcomes for this course are tied directly to in-class experiences. Your class participation grade will be EARNED by actively and thoughtfully participating in class discussions, by engaging with guest speakers, and by contributing to workshops.

Students with unexcused absences for more than **2 class sessions** will have their grade reduced by at least 5% for every 2 classes (or part thereof) missed. Unexcused absences are absences without appropriate documentation (documentation to be completed on the self-declaration form and provided to the course instructor). Due to the ongoing Covid-19 situation, no medical documentation is required. Self-declaration forms can be found on the BCOM BrightSpace site. Students with unexcused absences from more than **5 class sessions** may not be permitted to submit their final assignment, Assignment 5. Successful completion of Assignment 5 is required to successfully complete this course.

Missed Coursework or Assessments: Students have a responsibility to proactively seek advice from their instructor when facing unexpected circumstances (eg. illness) which interfere with their academic obligations. "Proactively" here means that, when possible, it is your responsibility to reach out to Dr. Smith (in person or by email) if you will or have missed class, and BEFORE you miss an assignment deadline.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that "A" grades are normally achieved by a minority of students.**

Percentage Range	Grade s	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

"N" (incomplete) grades: **All graded components must be completed in this course** or you will receive an incomplete grade of N (grade point value of 0).

It is required that you must submit and pass the final assignment (**Assignment 5**) to pass this course. In the case that you do not attain a passing grade in this component, it will result in a final course grade of (F) fail or (N) incomplete, with the maximum possible percentage grade of 49.

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

In Bachelor of Commerce courses like ENT 100, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words
- paraphrasing a published or unpublished author without referencing the source
- duplicating a table, graph or diagram, in whole or in part, without referencing the source
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source
- copying the answers of another student in any test, examination, or take-home assignment
- providing answers to another student in any test, examination, or take-home assignment
- taking any unauthorized materials (crib notes) into an examination or term test
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination
- stealing or mutilating library materials
- accessing a test prior to the time and date of the sitting
- changing the name or answer(s) on a test after that test has been graded and returned
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

Recognizing the need to build in flexibility to course delivery and given the many ENT 100 guest speakers, it is possible that our schedule may encounter changes as we work together and adjust to feedback. Our Ent 100 Brightspace site will be kept current. If in doubt about an updated schedule, check there.

ENTREPRENEURSHIP 100 A= Monday B= Wednesday	Type	Date	Description
ENT 100Week 1 Welcome to ENT 100	See Brightspace	Wednesday, Sept 6	Session Plan: Course overview & Entrepreneurship introduction Introduction to Assignment #1 –Interview Introduction to Assignment #5–Connections & Reflections Portfolio/ Business Model Canvas
ENT 100Week 2A	See Brightspace	Monday, Sept 11	Session Plan: How to find Ideas Introduction to Assignment #3 –Idea Journal
ENT 100Week 2B	See Brightspace	Wednesday, Sept 13	Session Plan: How to use creativity to help find ideas
ENT 100Week 3A	See Brightspace	Monday, Sept 18	Session Plan: Entrepreneur Guest Speaker
ENT 100Week 3B	See Brightspace	Wednesday, Sept 20	Session Plan: How to use Design Thinking to build ideas
ENT 100Week 4A	See Brightspace	Monday, Sept 25	Session Plan: How to develop Value Propositions and Product Concepts Introduction to Assignment #4 – Pitch-it Video
ENT 100Week 4B	See Brightspace	Wednesday, Sept 27	Session Plan: How to build an Entrepreneurial Mindset & Transaction Thinking - Part 1 Introduction to Assignment #2–Transaction Thinking Assignment #1 – Interview – DUE
ENT 100Week 5A	See Brightspace	Monday, Oct 2	NO CLASS – University Closed(National Day for Truth and Reconciliation, September 30th)
ENT 100Week 5B	See Brightspace	Wednesday, Oct 4	Session Plan: Entrepreneur Panel Discussion –Where do ideas come from and how do they evolve?
ENT 100Week 6A	See Brightspace	Monday, Oct 9	NO CLASS – THANKSGIVINGHOLIDAY
ENT 100Week 6B	See Brightspace	Wednesday, Oct 11	Session Plan: Workshop–Transaction Thinking, Assignment 2
ENT 100Week 7A	See Brightspace	Monday, Oct 16	Session Plan: How to build an Entrepreneurial Mindset & Transaction Thinking – Part 2 Assignment #2 –Transaction Thinking– DUE
ENT 100Week 7B	See Brightspace	Wednesday, Oct 18	Session Plan: Entrepreneur Guest Speaker ~Social innovation and social enterprise - context and considerations

ENT 100Week 8A	See Brightspace	Monday, Oct 23	Session Plan: How to make Strategic Customer Decisions
ENT 100Week 8B	See Brightspace	Wednesday, Oct 25	Session Plan: How to evaluate Value Propositions and Opportunities READcase BEFORE class
ENT 100Week 9A	See Brightspace	Monday, Oct 30	Session Plan: How to finance your venture
ENT 100Week 9B	See Brightspace	Wednesday, Nov 1	Session Plan: Where to find internal University resources Where to find external resources Assignment #3 –Idea Journal – DUE
ENT 100Week 10A	See Brightspace	Monday, Nov 6	Session Plan: How to create a Business Model Canvas –the rest of the elements – PART 1
ENT 100Week 10B	See Brightspace	Wednesday, Nov 8	Session Plan: How to create a Business Model Canvas –the rest of the elements – PART 2 Assignment #5– Option 2– Optional hand-in of BMC draft1- pager for feedback from Claudia (not graded).
ENT 100Week 11A	See Brightspace	Monday, Nov 13	NO CLASS - READINGBREAK
ENT 100Week 11B	See Brightspace	Wednesday, Nov 15	NO CLASS - READINGBREAK
ENT 100Week 12A	See Brightspace	Monday, Nov 20	Session Plan: How to build your founding team & lead and motivate first employees Assignment #4 –Pitch video – DUE
ENT 100Week 12B	See Brightspace	Wednesday, Nov 22	Session Plan: How to form your venture How to set up your venture How to protect your ideas Assignment #4 – Pitch video assessments (2) – DUE
ENT 100Week 13A	See Brightspace	Monday, Nov 27	Session Plan: What matters to you as an entrepreneur?
ENT 100Week 13B	See Brightspace	Wednesday, Nov 29	Session Plan: Entrepreneur Panel Discussion –Lessons learned through founding a venture that scaled
ENT 100Week 14A	See Brightspace	Monday, Dec 4	Session Plan: Let's reflect & wrap-up Assignment #5–Connections & Reflections Portfolio or Business Model Canvas - DUE

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

Important Course Add/Drop Dates:

- *Last day for 100%refund of tuition fees for standard courses dropped*
September 19th, 2023

- *Last day for 50%refund of tuition fees for standard courses dropped*
October 10th, 2023

- *Last day for withdrawing from first term courses without penalty of failure*
October 31st, 2023

ENT 402 (A01)

Entrepreneurship & Small Business for the Non-specialist

Fall, 2023 Course Outline

Note: please check the Brightspace course site frequently for updates and course changes.

Course hours (PST):	6:30pm – 9:20pm Pacific
Location:	David Strong Building C112 BlackInk Room
Zoom Online Classroom/Office Link:	Meeting ID: 816 9409 3364/ Password: 202309
Instructor:	Dr. Leslie McGeough
Office hours:	Before or after class, or by appointment. Please email me for confirmation of an appointment via Zoom.
Telephone/Text:	(250) 415 3234
Email:	lmcgeough@uvic.ca

We acknowledge with respect the Lekwungen-speaking peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environments for all its members.

Introduction:

Hello everyone! Welcome to Entrepreneurship & Small Business for the Non-Specialist. Looking forward to meeting you soon, and thanks for choosing this course. Entrepreneurship is such a fun subject to teach and to learn. To me, the best way to learn entrepreneurship is to try it, so you'll get to experience the thrill of several effective start-up processes and tools, customer development research, iterative product (or service) design and testing, and business and financial modelling. Whether you're an entrepreneur at heart, or looking to work in an innovative organization, this is a great course to develop an entrepreneurial mindset. Having been a two-time technology entrepreneur in my other life, I have lots of real-world experiences to share, many of which have shaped the design of this course.

Required Text:

Title: 100 Essential Small Business Skills
Author: McGeough & Garner
Publisher/Year: Go Forth Institute/ 2021

Reference Materials:

Provided free of charge for UVic students, and available for download from the Brightspace course site

Additional Readings:

Additional readings, videos and cases will be assigned throughout the course. Please refer to the Course Schedule for detail, and to the Brightspace course site for information about and access to these additional resources and materials.

Course Objectives and Description:

"A person who never made a mistake never tried anything new." - Albert Einstein, physicist.

At the end of this course, you will be able to:

- Evaluate entrepreneurial situations to identify good opportunities from good ideas using a variety of decision techniques
- Apply customer development research techniques to better understand potential customers and their needs and wants
- Construct minimum viable products (MVPs) to test conceptual solutions with potential customers
- Assess, critique and create business models for new ventures from a variety of industries
- Evaluate and recommend resources and sources of funding that are available for new venture start-ups
- Articulate options for protecting intellectual property from both the entrepreneur's and investor's perspective

ENT402 is an exciting course designed to change the way you think about entrepreneurship and the way you look at yourself and the opportunities around you. You will explore entrepreneurial opportunities and human-centred problem-solving techniques, develop and test business ideas and models, and build a matrix of skills and attributes that will provide a framework for entrepreneurial success – either as an independent business owner, or as a member of an intrapreneurial team within organization. You will understand the role entrepreneurs play in society, and the economic importance of supporting entrepreneurs. You will also walk away with an understanding of your own willingness to venture, the skills you have that enable you to venture, and the experience you need to gain to be successful.

This course is not limited to those who are interested to start their own business one day. Intrapreneurship takes entrepreneurship into the corporate world. It creates a marriage between entrepreneurial creativity and corporate discipline – it allows you to accomplish more with fewer resources, cultivate relationships, and build your expertise. This course is founded on the belief that entrepreneurship is a way of thinking rather than something one does, in either an independent small business or inside a corporation.

Once you achieve a solid theoretical understanding, specific venturing skills of planning for and launching a new venture become the focus. In this course we will spend several sessions discussing ways to identify, screen and evaluate new business ideas. One of the major dilemmas facing any entrepreneur is the abundance of "good" ideas. The tougher part is deciding which of them is the "good" opportunity that warrants pursuit!

Of course, evaluating "good" ideas means talking to potential customers to gain their feedback on your great idea. You will be researching the market, learning more about the customers for your idea, and gaining valuable insight into what it would take for these people to become real customers. Learning to conduct consumer development research is an important part of this dynamic course.

Whether you find yourself with a new venture opportunity that requires venture capital or plan to fund a start-up with your own resources, one thing appears to be certain: creating a realistic, comprehensive Business Model can significantly increase your chances of success. Throughout the course we will use a shared and clear understanding of how a start-up creates, delivers and captures value by using the Business Model Canvas (Osterwalder, 2009) which represents any company in nine boxes, depicting the details of a company's product, customers, channels, demand creation, revenue models, partners, resources, activities and cost structure.

We will also explore additional relevant topics to an investigation of entrepreneurship – how to protect intellectual property, develop a formal written business plan for investors or lenders, estimate potential revenue, and operate a new business venture within the context of Canadian federal government and regulatory environments. We end the course with a review of many inspiring social entrepreneurs who are taking innovation and the entrepreneurial mindset and applying them to help solve some of the world's greatest challenges.

This course provides real world, hands-on learning on what it's like to start a company. This is a practical class—essentially a lab, not a theory or “book” class. The goal, within the constraints of an online classroom and a limited amount of time, is to create an entrepreneurial experience for you with all the pressures and demands of the real world in an early-stage startup.

This course will cover the above and other related topics with discussions, reading and writing assignments, instructor presentations, a series of stimulating entrepreneurial exercises, and a team project.

Course Format:

Section: A01/ CRN 11472	Days: Wednesdays	Time: 6:30pm –9:20pm	Location: DSBC112 or Zoom
* Please note * This class is scheduled to run W 6:30pm – 9:20pm Pacific Time. Classes are entirely on campus, however some classes may be held online via Zoom. It is your responsibility to know what is happening when, what you need to prepare on your own or with your team, and when to show up on campus or online. Please subscribe to Announcements in Brightspace.			

This course will be mostly on campus, however some classes may be held online. Please refer to the class schedule so you know what's happening when. During class sessions, you should be prepared to lead off the discussion of any question in a significant way as well as to discuss salient issues which are not addressed per se in the assignments. As in any class discussion, it is crucial that you are well-prepared, listen carefully to others, and build on/critique previous comments. Clearly, you must participate in class if you are going to share your ideas with others. There is, however, no need to participate in every class. It is the quality of comments, not the quantity, that is germane. Occasionally, students find that it is easier to participate effectively from the point of view of a particular person or functional area, or to take on the role of devil's advocate or expert (if expertise is possessed) on the topic being discussed.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain a diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology:

A variety of educational technology will be used in this online course including internet-based technologies or web-based applications, cloud services and/or social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted

by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: Zoom Online. You will be notified if this list changes. These technologies are used to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at <https://zoom.us/privacy>. You are encouraged to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Assignment #	Assignment Type	Individual or Group	Weight % of grade	Due Date
ENT402-1	Ideation Gallery –Idea 1	Individual	0%	09/20/2023
ENT402-2	Ideation Gallery –Idea 2	Individual	15%	09/27/2023
ENT402-3	Ideation Gallery –Idea 3	Individual	20%	10/04/2023
ENT402-4	CustomerDevelopment Research	Individual	30%	10/25/2023
ENT402-5	Design Sprint Presentation	Team	5%	10/25/2023
ENT402-6	Financial Feasibility Report	Team	10%	11/22/2023
ENT402-7	Team Project Presentation	Team	20%	11/29/2023
			100%	

If you disagree with any grade received on an assessment you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that your work may be reviewed in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade. The final grade obtained from the above marking scheme for the purpose of GPA calculation will be based on the percentage-to-grade point conversion table as listed in the current Undergraduate Calendar.

Course Lecture Notes:

Unless otherwise noted, all course materials supplied to students in this course have been prepared by the instructor and are intended for use in this course only. These materials are NOT to be re-circulated digitally, whether by email or by uploading or copying to websites, or to others not enrolled in this course. Violation of this policy may in some cases constitute a breach of academic integrity as defined in the UVic Calendar.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Description of evaluation standards for evaluation elements.

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. To receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step- by-step process:

1. Discuss with your whole group first and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of **5%** for each day an assignment is late.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, is not permitted in this course.

Attendance and Participation:

Regular attendance is an expectation of the Gustavson School of Business. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

One missed class is fine, but more absences may result in downward adjustment of your grade. Students with unexcused absences from 3 or more on campus or online class sessions will have their final grade reduced by a minimum of 5%. The reasoning behind this apparently very stringent policy is that classes demand active participation and attendance.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description
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85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Final course grades are official only after they have been approved by the Program Director and may be subject to change up until that point.

Academic Integrity:

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- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.

- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- Accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

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Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Online Synchronous Session Access:

UVic Zoom online classroom access will be posted in Brightspace. Please enable Brightspace Announcement notifications by email to receive these posts by email, or please check the Brightspace course site regularly to view Announcements posted by your instructor.

Course Schedule Summary:

Module Title	Date	Type	Class Description, Required Readings and Activities
ENT402:Week 1 Course Introduction Entrepreneurship Overview	Wednesday, September 6 6:30pm–9:20pm UVic Campus – Required Attendance	Reading Video Complete exercise	Introduction to entrepreneurship What is entrepreneurship? Where do entrepreneurial ideas come from? Course overview, learning outcomes and expectations Class 01 pp. 1-20 10 myths of entrepreneurship Complete: Entrepreneurship self-assessment exercise, pp. 21-44
ENT402:Week 2 Opportunity Recognition	Wednesday, September 13 6:30pm–9:20pm UVic Campus – Required Attendance	Reading Reading Video Video	Opportunity Recognition – Distinguishing a good business opportunity from a good idea Class 02 pp. 45-69 What makes entrepreneurs, entrepreneurial? (Sarasvathy, 2010) Marshalling resources Ideation Gallery – Idea1 overview

Module Title	Date	Type	Class Description, Required Readings and Activities
ENT402:Week 3 Opportunity Evaluation and Quantification	Wednesday, September 20 6:30pm–9:20pm UVic Campus – Required Attendance	Reading Complete Assignment	Opportunity Evaluation and Quantification Class 03pp. 80-112 Ideation Gallery –Idea 1(0%) DUE
ENT402:Week 4 Finding Customers Developing Empathy Design Thinking Exercise	Wednesday, September 27 6:30pm–9:20pm UVic Campus – Required Attendance	Video Complete Assignment	Finding Customers and Developing Empathy Developing customers Ideation Gallery –Idea 2(15%) DUE
ENT402:Week 5 Creating Value	Wednesday, October 4 6:30pm–9:20pm UVic Campus – Required Attendance	Reading Prepare for class Complete assignment	Creating Value: Creating a value proposition Value proposition canvas explained MVP Design and Survey Testing Class 04pp. 127-159 Customer development research assignment overview Prepare: one value proposition canvas for one idea Ideation Gallery –Idea 3(20%) DUE
ENT402:Week 6 Business Model Canvas MVP Design Lab Survey Pre-testing	Wednesday, October 11 6:30pm–9:20pm UVic Campus – Required Attendance	Video Video Prepare for class	Business Model Canvas MVP/prototype testing MVP Experiment Canvas Prepare: one business model canvas for one idea Prepare: your MVP experiment canvas Prepare: your customer survey
ENT402:Week 7 Lean Start-up Principles	Wednesday, October 18 6:30pm–9:20pm UVic Campus – Required Attendance	Reading Video Video	Lean Start-up Movement Class 05 pp. 179 – 194 Lean start-up movement Overview of build-measure-learn cycle
ENT402:Week 8 Design Sprint	Wednesday, October 25 6:30pm–9:20pm UVic Campus – Required Attendance		Design Sprint Team project and presentation assignment overview

ModuleTitle	Date	Type	Class Description, Required Readings and Activities
		Complete assignment	Team design sprint to select team project and idea iteration and team presentation Customer Development Research (30%) DUE Design Sprint Presentation (5%) in class
ENT402:Week 9 Financial Feasibility Funding and Financing	Wednesday, November 1 6:30pm–8:00pm UVic Campus – Required Attendance	Reading Reading	Financial Feasibility Class 06 pp. 201 –230 Class 12 pp. 455 –476
ENT402:Week 10 Field Testing and Validation	Wednesday, November 8 6:30pm –9:30pm Zoom Online Classroom as per posted schedule	Video Video Video	Testing and Validation No assigned readings Forms of Business Organization Elements of a formal business plan Key elements of successful business plans
ENT402:Week 11	Wednesday, November 15 Reading Days	No class scheduled this week	Continue work on team project and presentation
ENT402:Week 12 Small Business Law Writing a Formal Business Plan Social Entrepreneurship, Innovation Collaboration and New Business Locations Course Wrap up and Reflections	Wednesday, November 22 6:30pm–9:20pm UVic Campus – Required Attendance	Reading Reading Reading Reading Video Video Video Video	Law, business plans, social entrepreneurship, innovation and collaboration, and new business locations. Class 09 – pp. 341 – 356 Class 11 – pp. 415 – 442 Class 15 – pp. 575 - 592 Appendices – pp. 599 –679 Legal side of small business: IP Protection Social Entrepreneurship and Innovation Collaboration –New Business Spaces and Places Financial Feasibility Report (10%) DUE
ENT402:Week 13 Presentations	Wednesday, November 29 6:30pm–9:20pm Zoom Online Classroom Presentation Schedule will be posted		 Team Project Presentations (20%) DUE

Students with diverse learning styles and needs are welcome in this course. If you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



IB 301 (A01)

International Environment of Business

Fall 2023 Course Outline

Note: please check your course and program sites frequently for updates and course changes.

Course hours:	Mondays and Thursdays, 1-2:20 pm
Location:	ELL 061
Instructor:	M. Carmen Galang
Office hours:	By appointment (email to set up meeting)
Email:	cgalang@uvic.ca

We acknowledge and respect thelək' wəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Introduction:

My full name is Maria Carmen Galang, but I go by Carmen as my first (given) name. I have been at UVic for 29 years now, and this is my first academic job since I obtained my PhD from the University of Illinois. My country of birth is the Philippines, and I am a dual Canadian-US citizen. I am married to an Irish, whose father came from Germany. We enjoy sharing stories from our cultural backgrounds and learning more about cultures: how it affects how we see the world and why we feel and behave the way we do.

Texts and Resources:

- THE GLOBAL BUSINESS ENVIRONMENT: SUSTAINABILITY IN THE BALANCE by Janet Morrison, 6th edition, 2023.
- A course pack available for purchase at the UVic bookstore, containing the case "Society's Voice Against Unilever Mercury Contamination in Kodaikanal"
- Other materials (such as other readings, additional cases, assignment instructions, powerpoints) will be posted on Brightspace as needed.

Course Objectives and Description:

This course focuses on the environment of business, namely the socio-cultural, political, legal, technological, ecological, and economic aspects that affect business decisions related to its strategy and operations, and ultimately performance. These aspects of the environment differ across countries, and pose opportunities and threats to both local and foreign businesses. Understanding how these aspects differ and how they affect business enables firms to make more appropriate decisions that lead to better organizational performance that matters to its various stakeholders such as investors, employees, customers, the public in general, and governments. Key current developments and issues in the business environment will also be examined. The course also provides opportunities to experience working in a group of diverse members much like what the workplace is, and to exchange views with other

variety of topics, and in the process, broaden one's perspectives that is of value in successfully managing the international business environment.

Course Format:

The course will use a combination of lectures, cases, in-class discussions, readings, assignments, in-class exercises/activities and videos to enhance student learning, through asynchronous and synchronous delivery. *Asynchronous* components include required readings accompanied by quizzes, videos and assignments, all accessible through Brightspace. These can be done at a time that is convenient to you; however, take note of the submission deadlines (see Requirements for Graded Work below). *Synchronous* components include meeting in-person twice a week, during which will be a combination of lectures, general class discussions, break-out group discussions and activities.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, let us create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.

Educational Technology:

I use a variety of educational technology in this course which may include internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Course Experience Survey:

The BCom Program and its instructors value your feedback. As with all of our courses, you will be expected to complete a confidential on-line course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the Program make improvements.

To complete the CES, you will need to use your UVic Netlink ID to access the survey, which can be done on your laptop, tablet or mobile device. As well, toward the end of the course, you will also receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey if you don't do so in the time provided in class.

Evaluation Elements:

Students will be evaluated according to the following elements and schedule:

EVALUATION ELEMENTS	Weight (%)	Due Dates/Times
Quizzes (7)	15	See Schedule below
Assignments (6)	25	See Schedule below
Class Participation	15	
Team Project <ul style="list-style-type: none"> • Team charter (deduction of 5% from team project grade if no submission) • Oral presentation (10%) • Written report (20%) 	30	<ul style="list-style-type: none"> • Team charter: 5 pm Oct. 16 (Mon.) • Oral presentations: Nov. 23, 27, 30, Dec. 4 • Written report: 5 pm Dec. 5 (Fri.)
Individual Final Paper	15	5 pm Dec. 12 (Fri.)
TOTAL	100 %	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Assessment:

The following are descriptions of evaluation standards for evaluation elements.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, **is not permitted** in this course for students who wish to use them.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

Quizzes (15%)

There are seven (7) quizzes. Unless indicated, all quizzes are based on the required reading(s) and videos. All quizzes are to be done on-line at a time convenient to you, but must be completed **no later than 1 pm** the day before the relevant class. In addition, completion of each quiz has a time limit of 15 minutes.

Class Preparation Assignments (25%)

To help you better engage during class, there are six (6) assignments that need to be submitted. All assignments are individual, independent work. Please note that collaboration on class assignments is only permitted with my permission and then only to the extent that I stipulate.

Specific instructions for each assignment will be posted on Brightspace as needed. Submit assignments through Brightspace **by 5 pm the day before the relevant class**.

Assignments that show care, thought, insight and effort in completion will be awarded more than one point (up to a maximum of 5 points). This means both content and presentation (such as grammar, spelling). Keep your submissions short: no more than 3 pages (excluding any cover page, references, graphs, diagrams, tables), single line spacing, at least 10 points font size – deductions may be made for not adhering to these format requirements.

Late Work: In the absence of a medical or family emergency, submissions after the deadline will have a 50% deduction from the awarded points; submissions after the class starts will not be accepted.

Class Participation (15%)

While attendance is a pre-requisite for participation, I understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, I encourage you to stay home when you are sick, taking care of yourself and protecting others. You may also choose to miss class for a job interview, home responsibilities, or a host of other reasons.

Although there is an accommodation for up to four (4) absences in the term, I want to emphasize that your presence in class positively affects your intrinsic learning, as well as that of your teammates, and contributes greatly to the overall learning environment. Therefore, your participation grade will be impacted if you have more than four (4) absences in the term. Students missing more than four (4) may request a make-up assignment from me for each additional absence. It is your responsibility to ask me for a make-up assignment within 4 calendar days of the missed class.

Exceptions to these attendance policies will only be considered for major extenuating circumstances, with permission from the Undergraduate Academic Director.

Class participation is an effective means of understanding the concepts, principles and processes covered in the course. There are many opportunities to actively participate, such as (1) contribution during general class and break-out group discussions; (2) oral report to the whole class of break-out group discussions, and (4) written submission of in-class activities.

Participation includes answering questions, raising points, sharing insights that contribute to a better understanding of the required readings or better awareness of the implications and issues involved; asking thought-provoking questions; sharing personal experiences to illustrate concepts and principles; sharing current news items from your reading of periodicals relevant to the topic being discussed. To actively participate requires coming to class prepared (having read all required reading assignments for the class, as well as exercise or case materials that need preparation, and having watched assigned videos). *Please note that you may be called upon during class to answer questions, share your thoughts and experiences, or report on your break-out group discussions.*

From time to time, there may be in-class exercises that will require submissions at the end of or during class. *Only submissions in class will be accepted as part of class participation, as they are a product of participating during the class.* Submissions in-class are normally done by e-mail; no submissions after the class has ended will be accepted.

Team Project: Assessing Country Attractiveness (30%)

At the Gustavson School of Business, team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.

What to do if there is a problem in your team:

Address the problem early in the process of working in your team. If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to BCom Program Director for initial meeting and further investigation as needed.

Please note Gustavson's standard of professional behavior when it comes to group activities ([Standards of Professional Behavior](#)):

- Credit work to all members of the group, especially when using the work for other purposes (e.g., when submitting a group report to a potential employer as a sample of your writing ability, you should cite the names of the other students who worked on the paper).
- It is unprofessional to let one or two members of the group do most of the work when the final grade or reward will be shared by the entire group as it circumvents the learning process. The group should attempt to resolve any misallocation of workload early in the process, and if difficulties persist, should seek advice from the professor or instructor as soon as possible.
- Collaboration on class assignments is only permitted with the instructor's permission and then only to the extent stipulated by the instructor. Be sure you understand the acceptable level of collaboration in each of your courses.
- We should each be a responsible and professional part of the group. This means delivering on work commitments, being prepared and on-time for meetings, and carrying an equitable workload share.
- We all deserve respect, consideration and common courtesy as members of the Gustavson School of Business. Deal with anger, tension and personality conflicts in constructive ways. Rude, insulting or disrespectful language or actions is neither professional nor appropriate.
- If group members reveal anything about themselves in confidence to other group members, and do not wish this information to be divulged outside the group, this should be respected. This would also apply to any confidential information about a third party or organization (e.g., a previous employer) that a member may divulge for group work purposes only.

Late Work: In the absence of a medical or family emergency, submission of the team's written report after the deadline will be given a 5% deduction from the assigned percentage grade; submissions 24 hours after the deadline will no longer be accepted, and your team will receive a grade of 0 for the written report. Appropriate documentation of the medical or family emergency must be submitted.

More detailed information about the IB 301 team project is posted as a separate document on Brightspace in the Course Outline & Instructor section. The focus of the team project is assessing the attractiveness of the general business environment of a country that your team has chosen. Country selection is on a first-come, first-served basis; a sign-up sheet will be posted on my office door starting at 5 pm on Oct. 16 (Mon.).

The team project is an opportunity to apply class concepts and to learn more about a country. As important, the team project is an opportunity to experience working in a group of diverse members much like what the workplace is, but also to develop skills in doing research (such as finding relevant and valid information or data; analyzing/interpreting the information or data according to the purpose or objective of the project), writing a succinct report, and doing an oral presentation.

You will be assigned to groups of 4-5 members, ensuring as much diversity as possible among group members. Groupings will be announced during the Oct. 12 class, so please be present at this class as groups will begin working then. Being present when the group first meets is an important ingredient to better group results. The purpose of group work is to enhance your skill in working collaboratively. When a group-based assignment forms part of your evaluation for a grade, all members of the group will receive the same grade. However, adjustments may be made for relative contribution through peer evaluation. Each team member must rate the participation of their teammates. Rate each teammate on the following statement: "This team member did their fair share of work in a timely and high quality manner." Use the

following rating scale: 1= *Strongly Disagree*; 2= *Disagree*; 3= *Neither Disagree nor Agree*; 4= *Agree*; 5 = *Strongly Agree*. Please **submit through Brightspace by 5 pm on Dec. 5 (Friday)** your assigned rating for *each* team member. Submission of this peer evaluation will be counted towards your participation mark.

There are three components to the team project: team charter, oral presentation and written report. Only the written report and oral presentation are graded. However, if your team does not submit your team charter by **5 pm on Oct. 16 (Monday)**, 5% will be deducted from the team project grade. Oral presentations will be recorded; the recordings will be seen only by me (or any designated marker for the course) for the purpose of helping to grade the oral presentation.

Oral presentations are scheduled over 4 classes: **Nov. 23, 27, 30 and Dec. 4**. Which date your team makes the oral presentation will be determined by me, on the basis primarily of ensuring a wider range of regions covered for each day. The oral presentation is worth 10%. Not all team members need to participate in the oral presentation; who and how many are to be decided by your team. However, participation in the oral presentation will be considered in your participation mark. The length of the oral presentation will be announced later, as it will depend on the actual number of teams; usually oral presentations are between 10-15 minutes with about 5 minutes for Q&A and transitions between groups. I will cut you off if you exceed the time allocated in order to give the same amount of time for all groups.

The team's written report is worth 20% and is due by **5 pm on Dec. 5 (Friday)** after the oral presentations. This allows your team to make adjustments to the written report if you wish.

Individual Final Paper (15%)

The individual final paper is based on the country report your team submitted, and is **due by 5 pm on Dec. 12 (Friday)**. This paper involves determining whether the country your team worked on is suitable for a specific firm to enter; you will be given a list of firms to choose from. The details of the 5-10 page Individual Final Paper requirement will be released 5 pm on Dec. 5 (Friday) via Brightspace.

Late Work: In the absence of a medical or family emergency, submissions after the deadline will be given a 5% deduction from the assigned percentage grade; submissions 24 hours after the deadline will no longer be accepted, and your grade for the final paper will 0. Appropriate documentation of the medical or family emergency must be submitted.

Attendance

Regular attendance is an expectation for Gustavson classes. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Let me know as soon as you can if you will be absent or have been absent due to illness, injury or family affliction; documentation may be required (within 24 hours after return to classes). These absences will be considered excused and will not count against your participation grade. For other reasons, it is also *highly appreciated* to inform me beforehand, if you will not be attending a class, will be late for class or will have to leave early.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	<u>Exceptional, outstanding and excellent performance.</u> Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	<u>Very good, good and solid performance.</u> Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	<u>Satisfactory, or minimally satisfactory.</u> These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	<u>Marginal Performance.</u> A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	<u>Unsatisfactory performance.</u> Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Please note: Students completing or planning to complete a Business minor require a minimum grade of C+ in each of the fundamental courses: Com 202, Com 220, Com 240, Com 250 and Com 317.

Final course grades are official only after they have been approved by the BCom Program Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

As our programs help to create business and government leaders, the Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- duplicating a table, graph or diagram, in whole or in part, without referencing the source.

- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Schedule: Please note that schedules are subject to change – any changes will be announced in class and through Brightspace.

DATE	TOPIC	REQUIRED All chapters refer to the textbook
Sept. 7 Thurs	Introduction	Read <ul style="list-style-type: none"> • Course Outline • Team Project Description
Sept. 11 Mon	Understanding Globalization	Read Chapter 1: The Business Enterprise in Focus Watch video: <ul style="list-style-type: none"> • Key Findings from the DHL Global Connectedness Index 2022 Report (NYU Stern, 19 min) https://www.youtube.com/watch?v=X0-mK9N4_vw Prepare for discussion: See <i>Brightspace</i> for discussion questions.
Sept. 14 Thurs	The Pandemic and the Global Business Environment	Read Chapter 12: Worldwide Pandemic: All in it together? Watch videos: <ul style="list-style-type: none"> • How humans are making pandemics more likely (Vox, 2020, 7 min.) https://www.youtube.com/watch?v=qp5CEclyk94 Prepare for discussion: See <i>Brightspace</i> for discussion questions.
Sept. 19 Sun	<ul style="list-style-type: none"> • Submit Quiz 1 by 1 pm. • Submit Assignment 1 by 5pm. 	
Sept. 18 Mon	Global Business Environment	Read Chapter 2: Globalization: Time for reassessment Assignment 1: Farmacias Similares case (<i>posted on Brightspace</i>)
Sept. 22 Wed	<ul style="list-style-type: none"> • Submit Quiz 2 by 1 pm. • Submit Assignment 2 by 5pm. 	

DATE	TOPIC	REQUIRED All chapters refer to the textbook
Sept. 21 Thurs	Corporate Social Responsibility	<p>Read Chapter 11: Ethics and Social Responsibility: What is the outlook for stakeholders?</p> <p>Watch videos:</p> <ul style="list-style-type: none"> Grameen Danone Food Project (2012, 12 min.) https://www.youtube.com/watch?v=ZDkTDcl53hg Grameen Danone – The business of social innovation (2014, 20 min.) https://www.youtube.com/watch?v=SDh2otLO1-k <p>Assignment 2: Grameen Danone case (<i>posted on Brightspace</i>)</p>
Sept. 24 Sun	<ul style="list-style-type: none"> Submit Quiz 3 by 1 pm. Submit Assignment 3 by 5 pm. 	
Sept. 25 Mon Sept. 28 Thurs	Sociocultural Environment	<p>Read Chapter 3: Culture and Societies: Identities matter</p> <p>Watch video: The surprising workforce crisis of 2030 – and how to start solving it now (TED Talks, 2014, 13 min.) https://www.ted.com/talks/rainer_strack_the_workforce_crisis_of_2030_and_how_to_start_solving_it_now?language=en</p> <p>Assignment 3: PIGAMU case (<i>posted on Brightspace</i>)</p>
Sept. 29 Fri	<ul style="list-style-type: none"> Submit your self-introduction on Brightspace <u>by 5 pm.</u> 	
Oct. 2 Mon	NO CLASS: National Day for Truth and Reconciliation	
Oct. 5 Thurs	Assessing Country Attractiveness	<p>Read The Process of Assessing Country Attractiveness (excerpt from Chapter 6, The International Business Environment by Hamilton & Webster, 2018) (<i>posted on Brightspace</i>)</p> <p>Watch videos:</p> <ul style="list-style-type: none"> Why Finland and Denmark are happier than the U.S. (CNBC, 2020, 25 min.) https://www.youtube.com/watch?v=6Pm0Mn0jYU What the Social Progress Index can reveal about your country (2014, 15 min.) https://www.ted.com/talks/michael_green_what_the_social_progress_index_can_reveal_about_your_country?language=en
Oct. 9 Mon	NO CLASS: Thanksgiving Day	
Oct. 12 Thurs	Group Effectiveness	<p>Read Forming The Team (Chapter 6, Creating Teams with An Edge, Harvard Business Essentials, 2004) http://ezproxy.library.uvic.ca/login?url=http://search.ebscohost.com/login.aspx?direct=true&db=e076mww&AN=674829&site=ehost-live&scope=site&ebv=EK&ppid=Page--23</p> <p>You will meet your assigned team for the team project group during class – Please make sure to attend!</p>
Oct 15 Sun	<ul style="list-style-type: none"> Submit Quiz 4 by 1 pm. Submit Assignment 4 by 5 pm. 	

DATE	TOPIC	REQUIRED All chapters refer to the textbook
Oct. 16 Mon		<ul style="list-style-type: none"> Submit team charter by 5 pm. Post your team's selected country, first come-first served; sign-up sheet on my office door will be available starting 5 pm.
Oct. 16 Mon Oct. 19 Thurs	Political Environment	<p>Read Chapter 5: The Political Environment: Democracy under threat</p> <p>Watch videos:</p> <ul style="list-style-type: none"> How bad is the crisis in democracy? (The Economist, 2020, 28 min.) https://www.youtube.com/watch?v=PWt7naYTiik War in Ukraine: how has the world changed? (The Economist, 2022, 8 min.) https://www.youtube.com/watch?v=XXcXVt3zaVwhpps://www.youtube.com/watch?v=XXcXVt3zaVw <p>Assignment 4: Society's Voice Against Unilever Mercury Contamination in Kodaikanal (<i>case in course pack</i>)</p>
Oct. 22 Sun		<ul style="list-style-type: none"> Submit Quiz 5 by 1 pm.
Oct. 23 Mon Oct. 26 Thurs	Legal Environment	<p>Read Chapter 6: The Legal Environment: International law gains strength</p> <p>Prepare for discussion: See <i>Brightspace</i> for the discussion questions.</p>
Oct. 29 Sun		<ul style="list-style-type: none"> Submit Quiz 6 by 1 pm. Submit Assignment 5 by 5 pm.
Oct. 30 Mon Nov. 2 Thurs	Technological Environment	<p>Read Chapter 9: Technology and Innovation: Creating sustainable solutions?</p> <p>Watch videos:</p> <ul style="list-style-type: none"> What will future jobs look like? (TED Talks, 2013, 15 min.) https://www.youtube.com/watch?v=cXQrbxD9_Ng Robots will steal your job, but that's ok (TEDx Talks, 2012, 18 min.) https://www.youtube.com/watch?v=kYlfeZcXA9U The future of work: is your job safe (The Economist, 2019, 19 min.) https://www.youtube.com/watch?v=gUc5oN_ffRo <p>Highly recommended video: The rise of AI (Bloomberg, 2018, 52 min.) https://www.youtube.com/watch?v=Dk7h22mRYHQ</p> <p>Assignment 5: See <i>Brightspace</i> for discussion questions.</p>
Nov. 5 Sun		<ul style="list-style-type: none"> Submit Quiz 7 by 1 pm. Submit Assignment 6 by 5 pm.
Nov. 6 Mon Nov. 9 Thurs	Ecological Environment	<p>Read</p> <ul style="list-style-type: none"> Chapter 10: Ecology and Climate Change: The clock is ticking Chapter 13: Sustainability in the Balance: The prospects

DATE	TOPIC	REQUIRED All chapters refer to the textbook
		<p>Watch videos, in this order</p> <ul style="list-style-type: none"> Let the environment guide our development (TED Talks, 2010, 19 min.) https://www.youtube.com/watch?v=RgqtrlixYR4 Doughnut economics (RSA, 2013, 18 min.) https://www.youtube.com/watch?v=CqJL-cM8gb4 The economics of kindness (Creatively United for the Planet, 2020, the first 34 min.) https://www.youtube.com/watch?v=eqRif4e6ORs <p>Assignment 6: How did we get here and what is the way forward? See <i>Brightspace</i> for questions to answer.</p>
Nov. 13-15	READING BREAK (Monday –Wednesday)	
Nov. 16 Thurs	Sustainable Development	Prepare for discussion: Revisit the Grameen Danone case. See <i>Brightspace</i> for discussion questions
Nov. 20 Mon	NO CLASS: Freeday to prepare for group presentations	
Nov. 23, 27, 30, Dec. 4	<ul style="list-style-type: none"> Group oral presentations: date/order to be assigned Course Experience Survey (CES) 	
Dec. 5 Fri	<p>Submit <u>by 5 pm</u>:</p> <ul style="list-style-type: none"> written report for the team project your peer evaluation <p>Release of the detailed requirements for the Individual Final Paper at 5 pm.</p>	
Dec. 12 Fri	<ul style="list-style-type: none"> Submit Individual Final Paper <u>by 5 pm</u>. 	

IB 415 (A01)

Cross-National Management Fall 2023 Course Outline

Note: please check your course and program sites frequently for updates and course changes.

Course hours:	Wednesdays, 8:30-11:20 am
Location:	MAC D103
Instructor:	M. Carmen Galang
Office:	BEC 218
Office hours:	By appointment (email to set up meeting)
Email:	cgalang@uvic.ca

We acknowledge and respect the lək' wəjən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Introduction:

My full name is Maria Carmen Galang, but I go by Carmen as my first (given) name. I have been at UVic for 29 years now, and this is my first academic job since I obtained my PhD from the University of Illinois. My country of birth is the Philippines, and I am a dual Canadian-US citizen. I am married to an Irish, whose father came from Germany. We enjoy sharing stories from our cultural backgrounds and learning more about cultures: how it affects how we see the world and why we feel and behave the way we do.

Texts and Resources:

Intercultural Management: Concepts, Practices, Critical Reflection by Dirk Holtbrügge, SAGE Publications Ltd., 2022.

A Course pack is also available for purchase at the UVic Bookstore. Other materials (readings, additional cases, exercise instructions, powerpoints) will be posted on Brightspace as needed, or are available on-line through UVic libraries <http://www.uvic.ca/library/>.

Course Objectives and Description:

The decades after World War II have witnessed an enormous increase in the movement of goods, services, ideas, information, and expertise across national boundaries, and a tremendous growth of transnational organizations, including multinational corporations (MNCs) and other forms of international alliances. The world has begun to resemble a global village. At the same time, dramatic demographic changes in the workforce are occurring in Canada and many other countries, both developed and developing. Tomorrow's managers, in domestic or overseas assignments, will increasingly work with people from different countries, cultures, and ethnic groups.

This course is intended to build on your journey in international business with theoretical perspectives, particularly focused on strengthening your knowledge and skills in managing and

interacting with people from different cultural backgrounds and countries of origin, and thus enabling you to operate effectively in our globalized environment.

Course Format:

There will be a combination of different learning activities: readings, short lectures, class exercises, case discussions, assignments, and group work, through asynchronous and synchronous delivery. *Asynchronous* components include required readings accompanied by videos and assignments. These can be done at a time that is convenient to you; however, take note of the submission deadlines. *Synchronous* components include in-person classes once a week, during which will be a combination of lectures, general class discussions and sharing, break-out group discussions and activities.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, let us create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs, the quicker we can assist you in achieving your learning goals in this course.

Educational Technology:

I use a variety of educational technology in this course. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Evaluation Elements:

Students will be evaluated according to the following elements and schedule:

ELEMENTS	Weight (%)	Due Dates
Assignments (6)	20%	Varies(see Course Schedule below)
Class participation	10%	In class
Team project <ul style="list-style-type: none"> • Team charter (5%) • Culture assimilators (15%) 	20%	<ul style="list-style-type: none"> • Team charter: 5 pm Oct 8 (Mon.) • Culture assimilators: 5pm Nov. 24(Fri.)
Midterm exam	20%	Oct. 11 (Wed.)
Final exam	30%	TBA(during exam period: Dec. 7-10)
TOTAL	100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Assessment:

Evaluation standards for each evaluation element are described below.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, **is not permitted** in this course for students who wish to use them.

Missed Coursework or Assessments: Students have the responsibility to proactively seek advice from their instructor when facing unexpected circumstances (e.g., illness) which interfere with their academic obligations. In cases of missing an exam or course assessment deadline etc., you are expected to reach out to your instructor in a timely manner (preferably before the exam or course assessment deadline or soon after).

Class Preparation Assignments (20%): These are written submissions in preparation for class. There are six (6) assignments. All assignments are individual, independent work. Please note that collaboration on class assignments is only permitted with my permission and then only to the extent that I stipulate.

Specific instructions for each assignment will be posted on Brightspace as needed. Submissions are to be done by **12 noon the day before the relevant class** through Brightspace.

Assignments that show care, thought, insight and effort in completion will be awarded more than one point (up to a maximum of 5 points). Keep your submissions short (no more than 3 pages, single line spacing, at least 10 points font size), no cover page.

Late Work: In the absence of a medical or family emergency, submissions of assignments after the deadline will have a 50% deduction from the awarded points; submissions after the class starts will not be accepted.

Class Participation (10%): While attendance is a pre-requisite for participation, I understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, I encourage you to stay home when you are sick, taking care of yourself and protecting others. You may also choose to miss class for a job interview, home responsibilities, or a host of other reasons.

Although there is an accommodation for up to two (2) absences in the term, I want to emphasize that your presence in class positively affects your intrinsic learning, as well as that of your teammates, and contributes greatly to the overall learning environment. Therefore, your participation grade will be impacted if you have more than two (2) absences in the term. Students missing more than two (2) may request a make-up assignment from me for each additional absence. It is your responsibility to ask me for a make-up assignment within 4 calendar days of the missed class.

Exceptions to these attendance policies will only be considered for major extenuating circumstances, with permission from the Undergraduate Academic Director.

Class participation is an effective means of understanding the concepts, principles and processes covered in the course. There are two components: (1) contribution during general class discussion, and (2) submission of in-class exercises.

1. Contribution during general class discussion includes answering questions, raising points, sharing insights that contribute to a better understanding of the required readings or better awareness of the implications and issues involved; asking thought-provoking questions; sharing personal experiences to illustrate concepts and principles; sharing current news items from your reading of business periodicals relevant to the topic being discussed; volunteering for class activities. Needless to say, to actively participate requires coming to class prepared (having read all required reading assignments for the class, as well as exercise or case materials that need preparation). *Please note that you may be called upon during class to answer questions or share your thoughts and experiences.*
2. From time to time, there will be in-class exercises that will require submissions at the end of class. *Only written submission in class will be accepted as part of class participation, as they are a product of participating during the class.* Submissions in-class can be done by e- mail; no submissions will be accepted after class has ended.

Team Project (20%): At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency, submissions of the team project requirements after the deadline will be given a 5% deduction from the assigned percentage grade; submissions 24 hours after the deadline will no longer be accepted, and your team will receive a

grade of 0 for the written report. Appropriate documentation of the medical or family emergency must be submitted.

You will be assigned to groups of 4-5, ensuring as much diversity as possible among the members. Groupings will be announced during the Oct. 4 class. The team project requirement is described in a separate document. The team charter is to be submitted **by 5 pm on Oct. 8 (Monday)** via Brightspace. The culture assimilators (written team project) is to be submitted **by 5pm on Nov. 24 (Friday)** via Brightspace.

You will have the opportunity to work on the culture assimilators created by the teams during the Nov. 29 class. I will select the culture assimilators ensuring a good range of different situations that will illustrate the cultural concepts covered in the course. Each team should assign the team member to explain and address questions about the assimilator and about the countries involved that may arise at that time.

The purpose of group work is to enhance your skill in working collaboratively. When a group-based assignment forms part of your evaluation for a grade, all members of the group will receive the same grade. However, adjustments may be made for relative contribution through peer evaluation. Each team member must rate the participation of their teammates. Rate each teammate on the following statement: "This team member did their fair share of work in a timely and high quality manner." Use the following rating scale: *1= Strongly Disagree; 2 = Disagree; 3= Neither Disagree nor Agree; 4= Agree; 5= Strongly Agree*. Please **submit through Brightspace by 5 pm Dec. 1 (Friday)** your assigned rating for each of your team members. The ratings you assign will not be disclosed to your team members, but team members may ask for their average rating.

Please note Gustavson's standard of professional behavior when it comes to group activities: [Standards of Professional Behavior](#).

- Credit work to all members of the group, especially when using the work for other purposes (e.g. when submitting a group report to a potential employer as a sample of your writing ability, you should cite the names of the other students who worked on the paper).
- It is unprofessional to let one or two members of the group do most of the work when the final grade or reward will be shared by the entire group as it circumvents the learning process. The group should attempt to resolve any misallocation of workload early in the process, and if difficulties persist, should seek advice from the professor or instructor as soon as possible.
- Collaboration on class assignments is only permitted with the instructor's permission and then only to the extent stipulated by the instructor. Be sure you understand the acceptable level of collaboration in each of your courses.
- We should each be a responsible and professional part of the group. This means delivering on work commitments, being prepared and on-time for meetings, and carrying an equitable workload share.
- We all deserve respect, consideration and common courtesy as members of the Gustavson School of Business. Deal with anger, tension and personality conflicts in constructive ways. Rude, insulting or disrespectful language or actions is neither professional nor appropriate.
- If group members reveal anything about themselves in confidence to other group members, and do not wish this information to be divulged outside the group, this should be respected. This would also apply to any confidential information about a third party or organization (e.g. a previous employer) that a member may divulge for group work purposes only.

Examinations (50%): There will be two exams, both closed-book and in-class. The midterm exam worth 20% is administered during regular class time (Oct.11, Wed.). The final exam is cumulative, worth 30% and is 2 hours long. Exams will utilize different formats, such as multiple choice, fill-in-the-blanks, true-or-false, and short essay questions.

Attendance: Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your learning

experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

Students with unexcused absences for more than two (2) classes may be penalized with a course grade reduction of 5%. Excused absences are those that are due to illness, accident or family affliction; documentation may be required.

It is also *highly appreciated* to inform me beforehand, if for any reason, you will not be attending a class, will be late for class or will have to leave early.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades:

Percentage Range	Grades	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	<i>Exceptional, outstanding and excellent performance.</i> Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	<i>Very good, good and solid performance.</i> Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	<i>Satisfactory, or minimally satisfactory.</i> These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	<i>Marginal performance.</i> A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	<i>Unsatisfactory performance.</i> Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

Final course grades are official only after they have been approved by the BCom Program Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School.

Acts of academic dishonesty include, but are not limited to, the following:

- Using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule:

Please note that this is subject to change – any changes will be announced in class and through Brightspace.

DATE	TOPIC	REQUIRED READINGS/CASES/ASSIGNMENTS (Chapters refer to the Holtbrügge textbook)
Sept. 6	Introduction	READ: <ul style="list-style-type: none"> • Chapter 1 –Relevance of Intercultural Management • Course Outline • Team Project Description
Sept. 13	Intercultural Competence	READ: <ul style="list-style-type: none"> • Chapter 8 –Intercultural Competence • Global Competencies: An Introduction by Bird & Osland, in <u>The Blackwell Handbook of Global Management</u> by Lane, Maznevski, Mendenhall & McNett, 2004, Ch. 3, pp. 57-80 (Brightspace) <p>PREPARE FOR DISCUSSION: Questions posted on Brightspace.</p> <ul style="list-style-type: none"> • CASE (on-line): From Regional Star to Global Leader by Nitin Nohria, <u>Harvard Business Review</u>, January 2009, 87:1, pp. 33-36 only
Sept. 20	Culture – Definitions, Manifestations, Delineations & Functions	READ: <ul style="list-style-type: none"> • Chapter 2– Definitions, Manifestations, Delineations & Functions of Culture

DATE	TOPIC	REQUIRED READINGS/CASES/ASSIGNMENTS (Chapters refer to the Holtbrügge textbook)
		<ul style="list-style-type: none"> Beyond Sophisticated Stereotyping: Cultural Sensemaking in Context by Osland & Bird, <u>Academy of Management Executive</u>, 2000, 14:1, pp. 65-77(on-line)
Sept. 27	Cultural Frameworks	<p>READ:</p> <ul style="list-style-type: none"> Chapter 4– Concepts of Culture Chapter 5– Cultural Differences and Cultural Similarities <p>PREPAREFOR DISCUSSION:</p> <ul style="list-style-type: none"> CASE (Brightspace): Why is it difficult to make friends in Denmark
Oct. 4	<p>Multicultural Teams</p> <p>Note: Assigned teams will start working on the team project</p>	<p>READ:</p> <ul style="list-style-type: none"> Chapter 9–Intercultural Training Multicultural Work Groups and Teams (Chapter 8, <u>Cross-Cultural Management</u> by D.C. Thomas & K. Inkson, 2022) (Brightspace) Creating Value with Diverse Teams in Global Management by Distefano & Maznevski, <u>OrganizationalDynamics</u>, 2000, 29:1, pp. 45-63 (on-line) Dry-run Exercise on Culture Assimilators (Brightspace)
Oct 8 (Mon)	Submit team charter by 5pm.	
Oct11 (Wed)	MIDTERM EXAM (8:30-10:00 am)	
Oct17 (Tues)	Submit Assignment 1bynoon.	
Oct. 18	Intercultural Communications and Negotiation	<p>READ:</p> <ul style="list-style-type: none"> Chapter 6–Intercultural Communications and Negotiation <p>Assignment 1 (Brightspace): Cross-cultural Negotiation: Americans negotiating a contract in China (Course pack)</p>
Oct24 (Tues)	Submit Assignments 2 & 3bynoon.	
Oct. 25	Intercultural Management of Individuals and Organizations	<p>READ:</p> <ul style="list-style-type: none"> Chapter 7–Intercultural Management of Individuals, Teams, and Organizations <p>Assignment 2 (Brightspace): International M&A –A German-Bulgarian-Romanian Case Study</p> <p>Assignment 3(Brightspace): Alfa i Omega</p>
Oct 31 (Tues)	Submit Assignment 4bynoon.	
Nov. 1	The Challenge of International Assignments (Part 1)	<p>Assignment 4CASE (Brightspace): Bosch in Kazakhstan</p> <p>PREPAREFOR DISCUSSION:</p> <ul style="list-style-type: none"> CASE (Brightspace): Yutaka Nakamura –A Foreigner in His Native Land
Nov. 8 (Tues)	Submit Assignment 5bynoon.	
Nov. 8	The Challenge of International Assignments	Assignment 5 (Brightspace): Recruitment, selection and compensation for Bosch-

	(Part 2)	Kazakhstan
DATE	TOPIC	REQUIRED READINGS/CASES/ASSIGNMENTS (Chapters refer to the Holtbrügge textbook)
Nov. 13-15(READING BREAK: Mon to Wed)		
Nov. 21 (Tues)	Submit Assignment 6 by noon	
Nov. 22	Ethics and Social Responsibility	<p>READ:</p> <ul style="list-style-type: none"> • When Ethics Collide: Managing Conflicts Across Cultures by Buller, Kohls & Anderson, <i>Organizational Dynamics</i>, 2000, 28:4, pp. 52-66 (on-line) <p>WATCH: "Business Meets The Doughnut" https://www.youtube.com/watch?v=J_WPzDVpKvw</p> <p>Assignment 6 CASE (Coursepack): Gap Inc's Ethical Procurement Practices</p>
Nov. 24 (Fri)	Submit team project (culture assimilators) by 5pm.	
Nov. 29	Team Presentation of Culture Assimilators WRAP-UP/REVIEW: Bring your questions for the review. Course Experience Survey	
Dec. 1 (Fri)	Submit evaluation of teammates by 5pm.	
FINAL EXAM (Date, time, place to be announced – Do not finalize travel plans until the date has been finalized and confirmed.)		



IB 416 (A01) International Marketing Fall 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.	
Course hours (PST)	8:30AM – 11:20AM every Monday
Location	MAC D110
Instructor:	Dr. Huachao Gao
Office:	BEC 204
Office hours:	In-person or through zoom; by appointment only (making an appointment through email, LinkedIn Message, or Microsoft Teams) https://uvic.zoom.us/j/6138153264?pwd=QmFXR3RtQm9VWmxCd0NyOE9SZmdUUT09
Telephone:	(250) 472 5503
Email:	hcgao@uvic.ca

We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

*UVic is committed to promoting, providing and protecting
A supportive and safe learning and working environment for all its members.*

Introduction:

Hello, I am your instructor Huachao Gao. Please feel free to call me H.C. or Prof. Gao. I have a Ph.D. degree in Marketing. My research focuses on international marketing and cross-cultural consumer behavior. I am teaching Marketing Principles and Management (Com 351), International Marketing (IB 416), and Digital Marketing (COM 450) at the undergraduate level at UVIC. I would like to welcome you to the IB Specialization Module, specifically the International Marketing class. This summer, we will go through the process of international marketing together. I hope we will have a fun, safe, and fruitful summer term together with all of you.

Texts and Resources:

Required Coursepack: IB 416 International Marketing –2023 Summer (IMPORTANT)

- Available through: _____
<https://www.iveypublishing.ca/s/ivey-coursepack/a1R5c0000FvbjSEAR>

Recommended (NOT required) Textbooks:

- Global Marketing Strategy, by Bodo B. Schlegelmilch (this ebook is available for FREE at UVic library: <https://link.springer.com/book/10.1007%2F978-3-319-26279-6>)
- Global Marketing 10th edition, by Mark C. Green and Warren J. Keegan (this ebook is available at <https://www.vitalsource.com/en-ca/products/global-marketing-mark-c-green-warren-j-v9780134899763>)

Course Objectives and Description:

This class is designed to teach you not only the basic concepts involved in international marketing, but also how to apply the knowledge in practice and your career. Specifically, the course objectives are to help students:

- Understand the basic global marketing process;
- Appreciate the differences and similarities of consumers from different parts of the world;
- Develop a clear picture on how global and local forces jointly shape marketing activities;
- Apply basic marketing mix into global context;
- Enhance analytical skills for case studying and learning;
- Have fun together.

Course Format:

This class is designed to teach you not only the basic concepts involved in international marketing, but also how to apply the knowledge in your life or career. Lectures, case studies, in-class group discussions and exercises, out-class student self-readings, and out-class group projects are designed to lead you to a better understanding of the applicability of the discipline.

To prepare for the class, please check the course outline and the Brightspace page of the course regularly. Reading the assigned material, completing the assigned case summary, and preparing some questions to ask are some excellent ways to improve your learning outcome.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title	Individual or Group	Type	Due Date	Weight / %of grade	Description
Participation	Individual	Attendance & Contribution	Continuous	15%	
Case Analysis	Team		See Schedule	15%	
Group Project	Team	Presentation + Report	07/19/2023 - 7/29/2023	30%	
Final Exam	Individual	Exam	TBD	40%	
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Description of evaluation standards for evaluation elements.

Participation (15%): Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. In addition, working in teams is a key component of your Gustavson experience. Being an effective team member requires you to be present and engaged in the classroom environment. Attendance is a critical component of everyone's academic success.

In this class, we will only consider participation grade, which could not be earned without attendance. Specifically, this part of your grade is determined by the following:

- In-class discussion and contribution: attending the synchronous class sessions; actively participating in our class sessions by asking and answering questions as well as discussing with fellow students.
- Online discussion forum: by completing some online tasks posted on Brightspace, you can earn extra contribution points.

Students with unexcused absences* from more than 3 class sessions will receive a grade of zero in class participation. Students with unexcused absences* from more than 5 class sessions will not be permitted to write a final examination (*unexcused absences = absences without appropriate documentation as per the University Calendar)

Case Analysis (15%): Throughout the semester, we will analyze four different cases from the Coursepack. We will use the four cases to demonstrate how to use the knowledge in making real-life marketing decisions. Your grade on the case analysis includes two component:

- **Team case presentation (5points):** each team will choose one case to present in the corresponding case discussion class. The team will have 15 minutes to present the recommendations from the case analysis to the rest of the class.
- **Team case summary report (10points):** your team is responsible for submitting a 2-page report for each case analysis.

IB-Module Group Project –International Marketing Part (30%):

- **Marketing Project Presentation (10 points):** Each team will have 30-minutes to present their key analyses and recommendations to the rest of the class. You will be graded on both the presentation style and content;
- **Marketing Project Report (20 points):** Each team will have to submit a 12-page maximum report through Brightspace before July-29.
- Tips for the group project:
 - Start working on the project early and get it finished gradually throughout the semester
 - Read the guidelines and grading rubric carefully (posted on Brightspace)
 - I am happy to offer my help in as many ways as possible. Please do not hesitate to contact me if you have any questions. For all groups, I will help you

collect and analyze International Marketing Research data. I can also read your report and give you advices before your it is finished, so that you can be sure you are on the right route.

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Final Exam (40%): The final exam (**TBD**) will be a case analysis at the individual level. Students will receive the questions one-day before the exam and receive the case during the exam. Per the requirement of Gustavson, the final exam will be a 3-hour in person one. The date will be scheduled by the university.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of 10% for each day an assignment is late. In the absence of a medical or family emergency, late submissions of the final exam will not be accepted.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty. Use of AI tools, including ChatGPT, is permitted in this course for students who wish to use them. But the usage should be restricted in the following areas: gathering information for the final group project, seek additional insights which will be ultimately modified by the students, check for language issues for all assignments. Using AI to assist Final Exam or write any assignments are prohibited. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that “A” grades are normally achieved by a minority of students.**

Percentage Range	Grade s	Grade Point Value	Description
90 – 100 85 – 89 80 – 84	A+ A A-	9 8 7	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
77 – 79 73 – 76 70 – 72	B+ B B-	6 5 4	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of The subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
65 – 69 60 – 64	C+ C	3 2	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0). Final course grades are official only after they have been approved by the Academic Director and may be subject to change up until that point.

In Bachelor of Commerce courses, we generally anticipate final grades that are distributed in line with the following:

For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

Students are expected to carefully review the following points discussing academic integrity and group projects that have been adopted by our School. Acts of academic dishonesty include, but are not limited to, the following:

- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.

- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
- Copying the answers of another student in any test, examination, or take-home assignment.
- Providing answers to another student in any test, examination, or take-home assignment.
- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
- stealing or mutilating library materials.
- Accessing a test prior to the time and date of the sitting.
- Changing the name or answer(s) on a test after that test has been graded and returned.
- submitting the same paper or portions thereof for more than one assignment, without prior discussions with the instructor(s) involved.

Students should be aware that all instructors reserve the right to use any plagiarism detection software program(s) to detect plagiarism for essays, term papers and other assignments.

The course materials used in this course (electronic and paper) are the intellectual property of the instructor and students cannot share the materials without the instructor's consent and cannot sell or profit from the instructor's intellectual property.

Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Schedule Summary:

Title	Type	Due Date	Description
Global Marketing: Class Introduction and Overview	Lecture; Discussion	09/11/2023 8:30 AM	Syllabus; Brightspace posted materials Global Marketing Process Model; Most basic decision in global marketing
Market Selection	Lecture; Discussion	09/18/2023 8:30 AM	PESTCLE Analysis; CAGE Analysis and GE Matrix; Entry Modes
Market Selection Case	Case Discussion	09/25/2023 8:30 AM	Case #1: The Espresso Lane to Global Markets
		10/02/2023 8:30 AM	National Day for Truth and Reconciliation
		10/09/2023 8:30 AM	Thanksgiving Day
Global STP	Lecture; Discussion	10/16/2023 8:30 AM	Cross-Cultural Consumer Behavior International Marketing Research Segmentation, Targeting, and Positioning in International Market
STP Case	Case Discussion	10/23/2023 8:30 AM	Case #2: Sony Targets Laptop Consumers in China Segment Global or Local
Global Product, Price, and Place Strategy	Lecture; Discussion	10/30/2023 8:30 AM	Global Product & Branding Strategies Setting Prices on the Global Market Global Distribution & Retailing Decisions
Product, Pricing, and place Case	Case Discussion	11/06/2023 8:30 AM	Case #3: Pacific Western Brewing Company – Going Organic
		11/13/2023 8:30 AM	Remembrance Day

Global Communication Strategy	Lecture; Discussion	11/20/2023 8:30 AM	Global Communication Strategy Marketing Budget Allocation
Communication Case	Case Discussion	11/27/2023 8:30 AM	Case#5: Five Guys Developing a Promotional Strategy for the Future
Group Project Presentation & Wrap up	Group Presentation	12/04/2023 8:30 AM	
Final Exam	Exam	TBD	FinalExam – CaseAnalysis

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.



IB 417 (A01)

International Finance

Fall 2023 Course Outline

Note: please check your course and program sites frequently for new updates and course changes.	
Course hours (PST)	Tuesday and Thursday, 8:30am-9.50am
Location	DSB C112
Instructor:	Dr Stuart Snaith
Office:	BEC 238
Office hours:	Thursday 10am-11am or by appointment
Email:	ssnaith@uvic.ca

We acknowledge and respect the lək̓ʷəŋən peoples on whose traditional territory the university stands and the Songhees, Esquimalt and WSÁNEĆ peoples whose historical relationships with the land continue to this day.

UVic is committed to promoting, providing and protecting a supportive and safe learning and working environment for all its members.

Introduction:

I have been at the University of Victoria since 2015, and prior to that taught in the UK, where I am originally from. Over the years I taught a lot of international finance courses and I am looking forward to teaching you this term.

For those of you who I have taught in the 3rd year, you will know I try to foster a relaxed learning environment, and my hope is that you will all feel comfortable to visit me in office hours if you have a query on the content. The last thing I want is for students to struggle in silence. I am here to help.

Texts and Resources:

Cheol Eun, Bruce Resnick and Tuugi Chuluun, *International Financial Management*, 10th edition
ISBN10: 1264413092 | ISBN13: 9781264413096 (McGraw Hill)
e-text only: <https://www.mheducation.ca/international-financial-management-ise-9781266224058-can-group>

Note—you do not need access to McGrawHill's "Connect" service.

Course Objectives and Description:

This course provides an introduction to international finance. It has four major objectives:

1. Provide an introduction to international financial markets.
2. Demonstrate how basic hedging tools can mitigate risk and show how their application can benefit firms engaging in international business activities.

3. Introduce approaches multinational corporations can adopt to mitigate operational risk.
4. Introduce the broad range of financing options available internationally to multinational corporations.

Topics covered in this course include but are not limited to: spot and forward exchange transactions; arbitrage in foreign exchange markets; international theoretical relationship between exchange rates, prices and interest rates; international financial derivatives; economic exposure, transaction exposure; raising of funds internationally.

As a 4th year finance course, concepts covered in previous finance courses will be incorporated. Students are expected to have a good working knowledge of these concepts, and good quantitative and analytical skills.

Course Format:

This course will be taught face-to-face. Most classes are in lecture format and will be accompanied by a slide deck which will be available for you on our course delivery site, Brightspace. Some classes include time for the instructor and/or students to solve financial problems.

Equity, Diversity and Inclusion:

Equity, diversity and inclusion are core values at UVic. At Gustavson, we know that diversity underpins excellence and is the foundation on which we build our work and interact with others. In this class, I intend to create a learning environment of mutual respect; an environment in which students from diverse backgrounds can thrive and in which different perspectives will be appreciated. Learning materials, in-class activities and in-person and online discussions will take place in a manner that respects diversity in terms of gender and sexual orientation, abilities, age, socioeconomic status, ethnicity, race, and culture. We each have a shared responsibility, to each other and ourselves, to create and maintain an equitable, diverse and inclusive community. Please let me know if I can do better to support your rights in our classroom. I will also do my best to listen and respond compassionately if you want to share with me how I can be a better ally.

Educational Technology

I use a variety of educational technology in this course including internet-based technologies or web-based applications, cloud services and social media. The use of technology is part of your engagement at the University. Some of these learning tools may collect, use and/or disclose your personal information and store or access that information outside of Canada.

UVic cannot require students to disclose personal information to technologies or organizations, which may store information on servers located outside of Canada because disclosure of personal information to vendors, systems or services storing or accessing that personal information outside of Canada is restricted by section 30.1 of BC's Freedom of Information and Protection of Privacy Act (FIPPA). Personal information is information about an identifiable individual; for example, your name or your email address.

The following educational technologies, which stores or accesses your personal information outside Canada, is required for this course: Youtube. I will make you aware if this list changes. I use these technologies to enhance your educational experience at UVic. The personal information is required by the service. The privacy policy and the terms of use list the personal information stored outside of Canada and are available at <https://www.youtube.com/yt/about/policies/#community-guidelines>. I encourage you to read these documents.

If you are not comfortable with your personal information being stored outside of Canada, please speak to me within the first week of class about using an alternative (such as using an alias or

nickname). Otherwise, by continuing in this course, you agree to the use of the educational technology in the course and the storage of personal information outside of Canada.

Evaluation Elements:

Students will be evaluated according to the following schedule:

Title (begin with Course Code)	Individual or Group	Type (Exam, Hand- in Assignment, Presentation, Quiz, Other)	Due Date (m/d/yyyy hh:mm AM/PM)PST	Weight / %of grade	Description
IB417: Participation	Individual	Other		10%	
IB417: Quizzes	Individual	Quiz	See schedule	30%	
IB417: Research Presentation	Group	Presentation	See schedule	20%	
IB417: Final Exam	Individual	Exam	TBC	40%	
Total				100%	

If you disagree with the assessment received on a grade component, you may request, in writing, that the work be reviewed. You need to cite why you think that it deserves a different grade, based on your work, relevant course materials and the assignment's grading rubric. Note that I may choose to review the work in its entirety, not just the portion in question and that the review may lead to a higher, lower or unchanged grade.

Note the following regarding evaluation for this course:

Quizzes

Quizzes are in person during class time using Brightspace.

Quizzes will consist of qualitative and quantitative questions. A question may be multiple choice, match the answer, or some other BrightSpace format that can be graded automatically. For some quantitative questions, you will be asked to enter the numerical answer based on the inputs given. You will not be able to show your work. You are expected to use a calculator or Excel to get the correct answer. If you make a mistake in your calculations and submit the wrong number on BrightSpace, you will get the question wrong. It is your responsibility to learn how to use these tools effectively.

Research Presentation

Details of this group presentation will be provided by your instructor.

Final Exam

The final exam covers all material covered in the course. This will be an open book exam.

The final exam will be in person using Brightspace. In addition to the Brightspace quiz question types (e.g. multiple choice, match the answer) that can be graded automatically you may also have to answer questions that require a written response.

Course Experience Survey:

The Gustavson School of Business and its instructors value your feedback. As with all of our courses, you will be asked to complete a confidential course experience survey (CES) about your learning experience in this class. The survey is vital to providing feedback to me regarding the course and my teaching, as well as to help the School make improvements for students in the future.

Given the importance of your feedback, class time will be dedicated to completing the online survey. When accessing the survey, you will need to use your UVic Netlink ID, which can be done on your laptop, tablet or mobile device. As well, toward the end of the term, you will receive an email inviting you to complete all of your course surveys. If you do not receive an email invitation, you can go directly to <http://ces.uvic.ca> to complete the survey.

Course Assessment:

Group Work: At the Gustavson School of Business team projects and assignments are an integral component to student learning. It is an expectation that students contribute equitably to all team assignments. In order to receive individual grades, individuals must participate in their team process to produce a team assignment. Individuals are expected to contribute to a team by being prepared for team meetings, having respectful discussions based on curiosity and inquiry, put diligent effort into team deliverables, and address team conflict in a timely manner and with civility. To read more about student expectations while at Gustavson, please see the [Gustavson Professional Standards](#). Failure to meet these expectations may result in being removed from the program or other academic penalty.”

What to do if there is a problem in your group:

If you feel there is a problem with the way your group is functioning, it is your responsibility to follow this step-by-step process:

1. Discuss with your whole group first, and refer to your program-specific team documents and guides as a basis for conversation and feedback.
2. If still unresolved, then discuss with your instructor/supervisor.
3. If still unresolved, then escalate to Program Director for initial meeting and further investigation as needed.

Late Work: In the absence of a medical or family emergency there will normally be a grade penalty of **5%** for each day an assignment is late.

Use of Artificial Intelligence (AI):

In all academic work, the ideas and contributions of others must be appropriately acknowledged and work that is presented as original must be, in fact, original. Using an AI-content generator (such as ChatGPT) to complete coursework without proper attribution or authorization is a form of academic dishonesty.

Use of AI tools, including ChatGPT is permitted for research purposes for the group presentation for students who wish to use them. To be consistent with our scholarly values, students must cite any AI-generated material that informed their work and use quotation marks or other appropriate indicators of quoted material when appropriate. Students should indicate how AI tools informed their process and the final product, including how you validated any AI-generated citations, which may be invented by the AI.

Use of AI tools, including ChatGPT, is forbidden for quizzes and the final exam.

Attendance and Participation:

Regular attendance is an expectation of the Bachelor of Commerce Program. Being present in class will ensure exposure to course concepts that will prove invaluable for your future personal and

professional success. Your positive participation will contribute to your classmates' learning and enhance our learning environment. Being present in class exposes you to material not in the readings, to your classmates' insights and helps clarify material, leading to better performance in the course. Attendance is a critical component of everyone's academic success.

In this course, participation will form **10%** of your course grade.

While attendance is a pre-requisite for participation, I understand that there may occasionally be reasons you are unable to attend class, for example: illness, injury or family affliction. In particular, I encourage you to stay home when you are sick, taking care of yourself and protecting others. You may also choose to miss class for a job interview, home responsibilities, or a host of other reasons.

In this course there is an accommodation for up to 4 absences in the term, I want to emphasize that your presence in class positively affects your intrinsic learning and contributes greatly to the overall learning environment. Therefore, your participation grade will be impacted if you have more than 4 absences in the term. Students missing more than 4 may request a make-up assignment from me for each additional absence. It is your responsibility to ask me for a make-up assignment within 4 calendar days of the missed class. In addition, you will be denied permission to write the final exam if you miss more than 8 classes.

Exceptions to these attendance policies will only be considered for major extenuating circumstances, with permission from the Undergraduate Academic Director.

Missed Coursework or Assessments: If you are absent for a graded component of this course you must submit the “Self-Declaration for Absence from an Assessment” form to your instructor for their consideration. A copy of this form is on your course Brightspace site. You should familiarize yourself with this form and the declarations contained therein.

Grading Scale:

Graded material in this course will be marked and reported to the Registrar using percentages. The percentage grade, the corresponding letter grade and comparative grading information will be displayed on student transcripts (official and administrative). The following table demonstrates the equivalent letter grades. **Please note that “A” grades are normally achieved by a minority of students.**

Percentage Range	Grade s	Grade Point Value	Description
90 – 100	A+	9	Exceptional, outstanding and excellent performance. Normally achieved by a minority of students. These grades indicate a student who is self-initiating, exceeds expectation and has an insightful grasp of the subject matter.
85 – 89	A	8	
80 – 84	A-	7	
77 – 79	B+	6	Very good, good and solid performance. Normally achieved by the largest number of students. These grades indicate a good grasp of the subject matter or excellent grasp in one area balanced with satisfactory grasp in the other area.
73 – 76	B	5	
70 – 72	B-	4	
65 – 69	C+	3	Satisfactory, or minimally satisfactory. These grades indicate a satisfactory performance and knowledge of the subject matter.
60 – 64	C	2	
50 – 59	D	1	Marginal Performance. A student receiving this grade demonstrated a superficial grasp of the subject matter.
0-49	E		Conditional supplemental
0-49	F	0	Unsatisfactory performance. Wrote final examination and completed course requirements; no supplemental.

“N” (incomplete) grades: All graded components must be completed or you will receive a failing grade of N (grade point value of 0).

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For 100-, 200- and 300-level courses:

Grade Range	Proportion Of Class
A's	25-40%
B's	30-50%
C	10-25%
D, F	0-15%

For 400-level courses:

Grade Range	Proportion Of Class
A's	30-50%
B's	25-45%
C	2-20%
D, F	0-10%

Academic Integrity:

As our programs help to create business and government leaders, the Peter B. Gustavson School of Business has an obligation to ensure academic integrity is of the highest standards. All cases of cheating or plagiarism, and any variations thereof, will be immediately referred to the Associate Dean, Programs. A student who violates academic integrity standards will fail the assignment and potentially fail the course, with a letter of reprimand placed in the student's record in the Registrar's office.

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- using work prepared by any form of artificial intelligence service, such as ChatGPT, without proper citation
- using the exact words of a published or unpublished author without quotation marks and without referencing the source of these words.
- paraphrasing a published or unpublished author without referencing the source.
- Duplicating a table, graph or diagram, in whole or in part, without referencing the source.
- paraphrasing the conceptual framework, research design, interpretation, or any other ideas of another person, whether written or verbal (e.g. personal communication, ideas from a verbal presentation) without referencing the source.
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- Taking any unauthorized materials (crib notes) into an examination or term test.
- impersonating another student or allowing another person to impersonate oneself for the purpose of submitting academic work or writing any test or examination.
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- Accessing a test prior to the time and date of the sitting.
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Students should be aware of the expectations surrounding their professionalism. Please refer to the [Standards of Professional Behavior](#) on the Gustavson website for details.

Provisional Schedule Summary:

Please note this schedule is subject to change.

Title (begin with Course Code)	Date	Chapters
IB417: Introduction	07-Sep-23	-
IB417: International Monetary System	12-Sep-23	Chapter 2
IB417: FXMarket 1	14-Sep-23	Chapter 5
IB417: FXMarket 2	19-Sep-23	Chapter 5
IB417: Quiz 1	21-Sep-23	
IB417: International Parity Conditions 1	26-Sep-23	Chapter 6
IB417: International Parity Conditions 2	28-Sep-23	Chapter 6
IB417: Foreign currency derivatives: futures and options.	03-Oct-23	Chapter 7
IB417: Problem solving class	05-Oct-23	
IB417: Quiz 2	10-Oct-23	
IB417: International banking and money markets	12-Oct-23	Chapter 11
IB417: Interestrateswaps and Currency Swaps	17-Oct-23	Chapter 14
IB417: Quiz 3	19-Oct-23	
IB417: Transaction Exposure	24-Oct-23	Chapter 8
IB417: Operating Exposure	26-Oct-23	Chapter 9
IB417: Problem solving class	31-Oct-23	
IB417: Quiz 4	02-Nov-23	
IB417: Raising debt and equity globally	07-Nov-23	Chapters 12 and 13
IB417: Exchange rate determination	09-Nov-23	Slides
IB417: NO CLASS	14-Nov-23	
IB417: Project Finance	16-Nov-23	Slides
IB417: Quiz 5	21-Nov-23	-
IB417: Presentations	23-Nov-23	-
IB417: Presentations	28-Nov-23	-
IB417: Review Class	30-Nov-23	-

Students with diverse learning styles and needs are welcome in this course. In particular, if you have a disability/health consideration that may require accommodations, please feel free to approach me and/or the Centre for Accessible Learning (CAL) as soon as possible. CAL staff are available by appointment to assess specific needs, provide referrals and arrange appropriate accommodations. The sooner you let us know your needs the quicker we can assist you in achieving your learning goals in this course.