

Course Outline

MOS 4488A - Management and Organizational Consulting

Fall 2022

Course Meets: Wednesdays, 6:30am to 9:20pm, Room: H111

Instructors: Prof. Jan Klakurka
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Course Scope and Mission:

This course examines the role of the management consultant and how the consulting industry serves to enhance the effectiveness of the organizations it serves. From an internal perspective, the course examines what it means to act as an external advisor, what skills are necessary to develop a successful consulting business model, and how to professionally engage clients to assist them in successfully reaching their goals through design and implementation of novel approaches and techniques that generate competitive advantage.

Emulating the skills necessary to be a successful consultant, this course will aid in development of problem-identification and solving abilities, communication and influencing skills, and introduce a project-based management mindset. These components lead to success in the consulting marketplace by balancing formal processes, methodologies, and models with the spontaneous creativity of a high-performance team, which manifest in the form of true innovation for clients and firm alike.

By following the consulting lifecycle, course participants will learn the nuances of the consulting business from uncovering issues, to framing problems, analyzing issues, presenting recommendations, and planning for the ever-important “Phase 2”. Students will see the industry from both perspectives, both as future consultants on a career-path to partner and as future industry managers looking to get the most from their use of external resources. The course’s 50:50 mix of lecture and in-depth case analysis will put to practice traditional strategic, process, and functional analyses together with taking on the role of “futurist” for each case organization to address business issues, to implement solutions, and to be at the forefront of knowledge development.

Course Prerequisites:

Enrolled in 3rd or 4th year BMOS at Huron University College.

Required Readings:

Required Text:

Required Texts for Book Review – Available Free from Archive.org (Wayback Machine: Free Registration is necessary for online book access) (Select one of three)

Required Text #1: The McKinsey Mind

https://archive.org/details/mckinseymindunde00rasi_0

Required Text #2: The McKinsey Way

<https://archive.org/details/mckinseywavusing0000rasi/page/n9/mode/2up>

Required Text #3: The McKinsey Engagement

<https://archive.org/details/mckinseyengageme00frig>

Recommended Text: Management Consulting: Delivering an Effective Project, 4/E, Louise Wickham & Jeremy Wilcock, Pearson Canada, 2012, ISBN: 9780273768746

Supplementary Text 1: Advice Business, The: Essential Tools and Models for Management Consulting, Prentice Hall, 2004, ISBN: 9780130303738

- Available as an e-book (.epub file) from UofT Libraries/Robarts

Supplementary Text 2: The Experiential Student Team Consulting Process: A Problem-Based Model for Consulting and Service-Learning, 3rd Edition, Wiley Canada, Dr. Ronald G. Cook | Paul Belliveau | Diane K. Campbell, ISBN-13: 9781285115429

Case Package: A package of ten cases is needed for the case analysis portion of the course and cases can be obtained on-line. There are additionally two (2) online simulations that we will work through. Cases and simulations must be ordered directly from the two primary suppliers of business cases, Ivey Business School and Harvard Business School, respectively. Ordering instructions for each institution are found in the appendix to this course outline. Make reference to the case list in the Weekly Schedule below to identify the publisher of individual cases. All cases should be order directly from Ivey to receive the best price. The two (2) simulations should be ordered through Harvard. Ordering instructions for both vendors are found in the appendix to this course outline.

Other Materials:

Each week, a PowerPoint presentation will be delivered to students covering material relevant to the theory and practice of consulting. The PPT decks will not simply repeat what is in the text, but will be complementary. Case learning points will be summarized weekly, as key “take-aways” from the class discussion. Other materials the instructor wishes to hand-out will be distributed on an as-needed basis.

Students will receive an information package from the Canadian Association of Management Consultants during the first class. A student membership, including receipt of the Association’s Methodologies text and 2013 Industry Study, is entirely optional for students who choose to join the Association and the choice to join or not will in no way impact a student’s course grade.

Evaluation and Grades:

Grades are a measure of the performance of a student in individual courses. Each student shall be judged on the basis of how well he or she has command of the course materials.

Assignment/Exams/Cases	Dues Date	Weight (%)
Class Participation	On-Going	20

Case or Simulation Assignment	Either simulation or any case can be chosen	15
Required Reading Book Summary	Oct. 19 th , 2022	15
Consultant Interview	Nov. 30 th , 2022	10
Real-Life Consulting Project (RLCP) Deliverable & Presentation	Last day of Class	40
TOTAL		100

A proposal and project work plan are due to the Professor, submitted to the appropriate assignment on OWL, by the Wednesday of Reading Week, November 2nd, 2022. A status report example and deliverable template are similarly due November 25th, 2022. Each is worth 5% of the overall grade. The remaining 30% of the RLCP grade is awarded based on the final client and professor deliverables described below at the end of term.

Participation: To maximize your participation grades – and overall learning – students should attend all classes to maximize opportunities to speak to their colleagues and concentrate on providing class comments which:

- Move the analysis along and/or take it to a “higher” level
- Provide insight that others may not have seen
- Are relevant to the class discussion
- Leverage prior learnings and other references, of your choice, in the context of the case
- Add clarity to course PowerPoint slides (required reading) in the context of the case
- Challenge colleagues in a professional and logical manner
- Drawn similarities to previous learnings
- Demonstrates their relation to the current case scenario being discussed

Grade review: The instructor does not discuss grades without a substantive reason. Substantive reasons include errors made during grading. If you would like me to re-evaluate your grade in any component of the course, you should follow this procedure:

- (a) Write a memo explaining why you need me to re-evaluate your grade. The memo should contain substantive arguments only, and not humanitarian (e.g., “I *really* need an A,” “I worked so hard”), or social justice (e.g. “he got an A for saying the same thing”) appeals. If you do feel that a social justice appeal is justified, you should get the cooperation of the person who you are comparing with, and have them also submit their paper. You may submit this memo to the commerce office.
- (b) You will normally get a response from me within a week.
- (c) The entire exam or paper will be re evaluated, and you should be aware that any grade changes are possible (i.e. decrease, increase or none). The only exception to the “entire paper gets re evaluated” policy is a case where there is a mathematical error in determining a grade.

Requirements and Criteria:

Performance in the course will be evaluated using a variety of methods that support the objectives identified above. A combination of exams, individual participation, group presentation, and case summary assignments will be used to evaluate participants on a number of different levels.

The criteria for success, in no particular order, are:

- Comprehension of the material
- Demonstration of an ability to think cross-functionally
- A willingness to participate for the benefit of oneself and fellow participants
- Strong work ethic to “pull your weight” in group assignments

These criteria will be applied to written and verbal work throughout the term.

Students will be evaluated on the following activities, as listed in the table below:

<i>Activity</i>	<i>Percent age of Grade</i>	<i>Description</i>
Consultant Interview	10%	Students should conduct an interview of no more than one hour with a consultant from practice and reflect on what this means for their own career, what it means for client service, how the information could be used for the RLCP®, lessons and tips for future practice and success, nuances for competitive positioning of firms, nature of competencies required, etc. Interviewees can come from firms, personal contacts, alumni of Huron, consulting clubs, fellow students, etc. A report of 4-5 pages should be handed-in on OWL. Interview questions can be included as an appendix. Working in a group of max. 5 students, in a focus group format, is also permitted. Due Date: November 30 th , 2022.
Participation	20%	Preparation for class case discussion, as demonstrated by; <ul style="list-style-type: none"> • willingness to lead and actively participate class discussions in a professional manner • providing valuable insights and analysis • responding to “cold-calls” • Using blackboard / PowerPoint / Excel spreadsheets to present analyses and findings
Required Reading Book Review Report	15%	A book review report of 5 pages maximum that discuss the key features of any of the required book readings. These should not be simply summaries, but critical and reflective reviews. For older books, students should consider what would be different in an “updated 2022 edition”. Reflections on how the material is and will be applied the RLCP® should be included. Students may provide a 5 minute overview of the report in class in PPT format to enhance their grade. Additional details will be presented on OWL. Due Date: October 19 th , 2022.
Simulation Analysis Write-Up	15%	Prepare either a professional report of a chosen case study or one of the two simulations (e-cases). Students may select any of the cases on the schedule and either of the two simulations on the schedule. Your assignment is simple: Prepare the Case. Use whatever tools and methodologies you deem appropriate. Hand the case in on the day we do it in class. You may choose to do additional research on the company(ies) in the case, at your discretion, but this is not necessary. Questions to help guide your analysis will be provided by the professor before each class.

Real-Life Consulting Project[®]

45%

These are not a composite set of questions, but rather to assist in framing your analyses. Students may also elect to hand in both a case and a simulation, two cases, or two simulations, in which case the two assignments would be graded out of 7.5%.

Taking on the role of external consultants, a limited number of groups of ~2 to 4 students (or as determined by the professor in conjunction with the client requirements) will propose (estimated to be 9-10 real-life projects available), project manage, and execute a “real-life”, pro-bono (non-paid) consulting project with a *company of their choosing or who has expressed interest in utilizing the skills of students as a client of a RLCP[®] team*. Students will be responsible for understanding the need, engaging the client representative, scoping the requirements, conducting analyses, providing client status updates, preparing their recommendations and developing an implementation plan.

The final student output (deliverable) for the RLCP[®] is the client report. This will include both detailed written report and presentation to client senior management. A summary presentation is also to be made in class on the last day.

As ***the client does not mark the student***, students must provide their working papers at the conclusion of the project. Working papers should be securely held in an applicable cloud service (e.g. Asana, Dropbox) and the Professor should be provided access. No Facebook sharing of document is allowed, although students may use it for planning meetings.

There are two (2) types of deliverables in the RLCP[®]; (1) the Final Report and Presentation to the Client, called “Client Deliverables”, and; (2) the other materials that are required to be submitted to your Professor, listed below under the section “Components of Assignment”, and referred to a “Professor Deliverables”.

To simulate a real consulting engagement, students must provide several other hand-ins, some signed by the client sponsor, as identified below;

- (1) A Client Proposal, including scope and approach (signed-back by client at project kick-off)
- (2) A Project Work Plan
- (3) A Data Gathering Approach, including Research Plan, and/or Interviewee Listing, Approach & Interview Guide, and/or Template samples, and/or focus group approach
- (4) A Weekly Status Report
- (5) A Deliverable Listing (signed-back by client at project completion)
- (6) A complete Client Deliverable in hard-copy format, complemented with a ten (10) minute group presentation of key findings.

Groups will be selected by the Professor. Students will be encouraged to provide resume & cover letter, plus other relevant materials, in mid-December before the course starts to showcase their skills. Teams will work together on their own time, allocating the work effort evenly to each of the team members. The time commitment for the RLCP[®] is approximately 7-8 (min.) hours/week per student.

By taking on this Real-Life Consulting Project[®] Assignment, all team members are giving their express implicit agreement to contribute effectively and evenly in the best interest of the client, and to respect each other, the client, and the reputation of the University of Toronto, Rotman, your Instructor, and the broader consulting profession.

N.B. The Real-Life Consulting Project[®] (RLCP[®]) is the core of the course. It is not a field project where the scope is purely self-defined by students. Some project scopes will be well-defined by the client, while others will require more validation shortly after the project begins.

The assignment details are as follows:

Objective: To provide the client organization with the most beneficial analyses, recommendations and modes of operationalization, based on the agreed client-organization requirements (could be strategy, operations, IT, etc.)

Tools: Groups should utilize learnings from the text, related PowerPoint slides, and any additional books on consulting, project management and/or strategy to structure the written assignment parts and presentation. Students should be prepared to apply a variety of models learned both in this and other classes.

Components of Assignment: Each group will be responsible for submitting several components of the overall assignment as follows:

- Proposal (guideline: 10 pages), worth 5%
- Project Plan, worth 5%
- Weekly Status Report example, worth 2.5%
- Deliverable Listing, worth 2.5%
- Data Gathering Approach/Results, worth 5%
- Project Deliverable Report (guideline: 25 pages), worth 25%
- Presentation (guideline: 10 slides, 10 minutes), worth 5% (at client site and/or in-class – may be duplicated for client staff and class)
- Non-Disclosure Agreement (professor, students, and client sign) should be an appendix to the Proposal

Working papers (various models, spreadsheets, analyses, research results, transcripts of interviews/meetings, etc. given to client; should be an appendix to Deliverable Write-Up)

COURSE FORMAT AND EXPECTATIONS

Course Objectives

This is a 50-50, lecture & case-based course that will draw upon real-world applied learnings highlighted in the text and PowerPoint slides each week, shared insights from students, instructor-led facilitation, and active individual/group participation each week to achieve the following measurable learning objectives:

1. Demonstrate understanding of management consulting concepts, as articulated in the weekly slides, text, through a final exam, two quizzes, and group & individual assignments that mimic those activities performed daily by real-world professionals
2. Provide valuable insights to business case discussions in class, on a regular basis, through active class participation and attendance at each class session
3. Exhibit an ability to plan and execute a long-term, group assignment, including development of a proposal, analyses, spreadsheet modeling, report, and group presentation
4. Highlight personal analytical, deduction, presentation and writing skills through a single, individual case interview guide assignment selected by the student from among those in the course timetable below

Grades will be a function of student's success on the activities noted above (and described below in more detail) to ensure a fair and objective assessment of performance.

It is expected that successful participants will have also achieved the following learning milestones by completion of this course:

- Applied cross-functional skills to make real-world-type decisions as they set and plan for the execution of engagements for several well-known organizations highlighted in the cases
- Learned a number of new analytical techniques utilized by professionals in the practice of strategy consulting and business advisory services
- Analyzed and evaluated various aspects of several case organizations, their competition, their business issues, their context, and related tactical options
- Developed client issue responses, decide among alternatives, and created implementation plans to ensure project success, client satisfaction, and firm profitability
- Created innovative "visions for the future" of each industry space in which case organizations play, including how the marketplace might evolve, what products/services will be like, what the consultant can do to assist to prepare for that future, and what can they do to "shape their destiny", drive thoughtware development, and gain market eminence
- Presented the results of their analyses and decision-making to their peers in a executive-style client summary
- Understand the use of these techniques in real-life settings, as demonstrated by consulting guest speaker(s)
- Enhanced communication skills by clearly and concisely sharing of complex information with their peers

Achieving the additional learning milestones will be evaluated as part of the participation grade and the overall quality of case analyses and recommendations made during class cases, quizzes, final exam, and the assignments.

To Use Turnitin.com:

Normally students will be required to submit their course essays to Turnitin.com for a review of textual similarity and detection of possible plagiarism. In doing so, students will allow their essays to be included as source documents in the Turnitin.com reference database, where they will be used solely for the purpose of detecting plagiarism. The terms that apply to the university's use of the Turnitin.com service are described on the Turnitin.com website.

For Written Assignments:

Please note that spelling and grammar will be considered in the evaluation of all assignments. That is, you may lose points for spelling mistakes and grammatical errors. Students who require additional support and/or tutoring with respect to their writing skills are encouraged.

For Group Work:

Learning to work together in teams is an important aspect of your education and preparation for your future careers. That said, project-based teamwork is often new to students; to work well in teams, it helps to follow a set of core expectations to best succeed at your team projects.

1. When working in a team, BMOS students are expected to:

- Treat other members with courtesy and respect;
- Honour the ground rules established by the team;
- Contribute substantially and proportionally to the final project;
- Ensure enough familiarity with the entire contents of the group project/assignment so as to be able to sign off on it as original work;
- Meet the project timeline as established by the team.

2. Resolving conflicts:

Conflicts are part of the team's process of learning how to work together. When handled well, it can generate creativity and bring-multiple perspectives to the solution.

Student teams are expected to work through their misunderstandings as soon as they arise (and prior to submission of the final project). When teams are unable to arrive at a solution that works for all members, the team must meet with the Course Instructor. The Instructor will listen to the team and help develop options for improving the team process. All members of the project team must commit to, and, utilize their action plans.

Weekly Schedule

Session	Date	Topic	Case / Simulation
1	Sep 14, 2022	<ul style="list-style-type: none"> • The Consulting Perspective & Process 	<p>Reading: Consulting at the Cusp, Clayton Christensen, HBS, Available on Quercus and from Robarts</p> <p>Case: International Profit Associates (9-801-397), HBS, Authors: Ashish Nanda et al</p>
2	Sep 21, 2022	<ul style="list-style-type: none"> • Proposal Development • Pitching & Orals Presentations 	<p>Reading: How to Lead Consultants to Exceed Expectations, (9B10TE07), Ivey, Authors: Gordon Perchthold, Jenny Sutton, 2010</p> <p>Case: <u>IBM's Knowledge Management Proposal for the Ontario Ministry of Education</u>, (9B05E007), Ivey, Author: Ken Mark, 2004</p>
3	Sep 28, 2022	<ul style="list-style-type: none"> • `Diagnostics & Problem Solving in the Client Context • Conceptual Models • Simulations Overview 	<p>Case: <u>Ford Motor Company and Cruji Management Consulting (A) & (B)</u>, (9A99E013 & 9A99E014), Ivey, Author: Peter C. Bell, 1999</p> <p>NB: Professor will hand-out Part B in class</p>
4	Oct 5, 2022	<ul style="list-style-type: none"> • Engagement Management & Status Reporting • Simulation Discussion & Results 	<p>Simulation: <u>Project Management: Scope, Resources, Schedule V2</u>, (K4700-HTM-ENG), HBS, Author: Robert D. Austin, 2013</p>
5	Oct 12, 2022	<ul style="list-style-type: none"> • Consulting in a Multi-Stakeholder Environment 	<p>Case: <u>Bon Star Hotel</u>, (9B09M072), Ivey, Author: Jim Kayalar</p>
6	Oct 19, 2022	<ul style="list-style-type: none"> • Drawing Insights from Data • Book Summary Assignment Due 	<p>Case: <u>Deloitte Recommends Client Selection to Regency Bank</u>, (9B11E005), Ivey, Author: Begen et al, 2011</p> <ul style="list-style-type: none"> • Spreadsheet will be provided by Professor on Quercus.
7	Oct 26, 2022	<ul style="list-style-type: none"> • Executing the Project • RLCP[®] Proposal and Work Plan Due 	<p>Case: <u>Deloitte & Touche Consulting</u>, (9-696-096-PDF-ENG), HBS, Authors: David Upton et al, 1996</p>
	Nov 2, 2022	<ul style="list-style-type: none"> • FALL READING WEEK 	NO CLASSES
8	Nov 9, 2022	<ul style="list-style-type: none"> • Communications: Firm, Team, & Client • Change Leadership 	<p>Simulation: <u>Change Management Simulation: Power and Influence V2</u> (4345-HTM-ENG), HBS, Authors: William Q. Judge, Linda A. Hill, 2013)</p>
9	Nov 16, 2022	<ul style="list-style-type: none"> • Navigating the Client • Dealing with Uncomfortable Situations 	<p>Case: <u>Sherif Mityas at A.T. Kearney (A), (B), (C), & (D)</u>, (9-904-031/035/037/074-PDF-ENG), HBS, Authors: Ashish Nanda & Kelley Morrell, 2004</p> <p>NB: Professor will hand-out Parts B-D in class</p>
10	Nov 23, 2022	<ul style="list-style-type: none"> • Guest Speaker: Andrew Matheou, MD, BMO Capital Mkts and former Deloitte strategy consultant • Project Performance Management • Meeting Firm, Personal & Client Objectives 	<p>Case: <u>Miles Everson at PricewaterhouseCoopers</u>, (410062), HBS, Authors: Robert G. Eccles, David Lane, 2010</p>

		<ul style="list-style-type: none"> • RLCP[®] Status Report & Deliverable Template Due 	
11	Nov 30, 2022	<ul style="list-style-type: none"> • Learning and Knowledge Management • Thoughtware & Innovation • Internal Consulting • Consultant Interview Due 	Case: <u>Innogy Consulting GmbH: Competing Away From Home</u> , (9B18M159), Ivey, Author: Jonathan Chen et al, 2019
12	Dec 7, 2022	<ul style="list-style-type: none"> • Final Group RLCP[®] Project Report (at least draft) Due • Values and culture in consulting 	Consulting Project: Final Presentations Case: <u>Centric Consulting Cleveland: Staying True to Core Values</u> , (9B18C033), Ivey, Authors: Gullett et al, 2018

Please note that the last day to drop this course without academic penalty is November 12th, 2022.

Appendix



Richard Ivey School of Business
The University of Western Ontario

Ivey
Publishing

MOS 4488A– Management & Organizational Consulting How to Order Cases

Instructor: Prof. Jan Klakurka

1. Please go to the Ivey Publishing website located at:
<http://www.iveycases.com>
2. Click on “Register”, and choose the “Student User” role. Complete the registration. (Please be sure to remember your username and password.)
3. Click on this link or copy into your browser: <https://www.iveypublishing.ca/s/ivey-coursepack/a1R5c00000E8riJEAR>
4. Select “Digital Download” – then click on Add to Cart.
5. Go to “My Cart” (located at the top of the page), and click “Checkout”.
6. Enter course information and verify your contact information.
7. Enter your credit card information and then click “submit order”
8. Once you have completed your order, go to “My Orders” to download a copy of the case.

9. You will receive an order confirmation and receipt by email immediately after placing your order.

IMPORTANT - Please Note the Following:

To open your cases you will need to enter (within the PDF document) the username and password you created upon registering.

Access to your case files will expire 30 days from date of purchase.

CASE FILES ARE NOT TO BE TRANSMITTED OR REPRODUCED WITHOUT PERMISSION

If you have any questions or problems, please email cases@ivey.uwo.ca or telephone 1-800-649-6355 during our regular office hours Monday to Friday 8am to 4pm EST.

Purchasing Simulations through Harvard Business Online for MOS 4488A Management Consulting, Instructor, Prof. Jan Klakurka.

Please purchase HBS cases by clicking on: <https://hbsp.harvard.edu/import/967177>

If you have any technical difficulties please contact HBS directly at: 1-800-810-8858 or techhelp@hbsp.harvard.edu

This is copyrighted material. Do not distribute or post. Please keep in mind we are giving you an academic rate for these cases.

Your Instructor

Prof. Jan Klakurka is a tenured Associate Professor and past Chair (2014-2021) of the Management and Organizational Studies Department at Huron University College, Western University and long-standing Instructor within the strategy department at the Rotman School of Management, University of Toronto. Management Consulting (RSM 495F/S was designed and developed exclusively by Jan who has successfully delivered it at Rotman since its inception twelve years ago – this is Jan’s course of which he is proud to share with you. Jan is a graduate of University of Toronto (B.Comm), the Richard Ivey School of Business (MBA), and Director’s College, McMaster University. Jan’s professional background spans nineteen years in industry and professional services, and ten more in academia where he consults to this day. Prior to the Academy, Jan was Director, Corporate Planning & Business Development, leading and delivering strategy for a mid-tier firm. He has led finance as corporate controller and streamlined operations as Director, Process Improvement, advised C-suite leaders a senior strategy consulting manager, and worked in Canadian treasury operations. With experience across multiple industries, Jan has served organizations across private and public sectors and now teaches senior year courses in strategy, international business, advanced taxation, among others. Jan’s research is directed toward the intersection of strategic planning, lucid foresight and governance, with recent keynotes covering consulting academics and conference presentations in global management. As such, Jan is a designated (APF) member of the Association of Professional Futurists.

Jan has taught *Strategic Management* at University of Toronto since 2005 (UTM: 2005-2009, Rotman: 2012-2022), Huron (2014-2022), and Laurier (2013-2015). Jan's other core teaching courses are *International Strategy* (formerly *International Business*) (2012-2021, including MBA in 2014) and *Management Consulting* at Rotman School of Management (2011-2022) where he introduced his proprietary Real-Life Consulting Project[®] that has now delivered over 135 actual consulting projects for RC students with billion-dollar companies, SME's, charities, and even Monitor Deloitte. He also regularly teaches *Introduction to Management* at Rotman Commerce each summer (2011-2019). In 2014, he designed, developed and began teaching a Summer Abroad (SA) course for Rotman/UofT at Masaryk University In Brno, Czech Republic called *Strategy in the European Context* that is going into its seventh year (2014-2019, all SA's cancelled 2020-22, returning 2023). At Huron @ Western, Jan has introduced *Organizational Governance* (2017-2020, 2022) with a Real-Life Board Audit (of not-for-profit Boards in SW Ontario) and *Strategic Foresight & Furturing* (2018-2020, 2022), Canada's only undergraduate course in future studies. He has also taught the general management Ivey LEADER (Leading Education in Emerging Regions) program in Dnepropetrovsk, Ukraine and Minsk, Belarus, has spoken on strategic foresight at University of Toronto, leadership, consulting, and finance at Brock University and the Ivey Business School, taught on the topic of wines at the Independent Wine Education Guild, and has developed and delivered training programs to Deloitte Consulting staff on a range of topics.

Jan has recently published in leading journal, *Foresight*, on scenarios for the future of the academy and has conducted a peer-review for a UNESCO chair in anticipatory systems. This past summer, Jan co-authored a chapter called Values-infused Foresight for Governance: A Practical Guide for Director's in the book *Leadership for the Future*. Together with two distinguished colleagues, he hosted the FutureProof conference (2020), is presenting at the International Leadership Association conference (2021) and is a planning committee member for the upcoming APF global conference to be hosted in Toronto. He presented at academic conferences globally, most recently at the European Academy of Management (2020 and 2021), British Academy of Management (2021), Institute of Competitiveness (Spring 2020), Scenario 2018 held at Warwick University (2018) on the future of the academy and at Constructing Social Futures hosted by the University of Turku's (Finland) Institute for Future Studies (2019) on leadership values as they inform foresight tendency and strategy. Jan is one of three co-developers for Huron's highly successful new interdisciplinary major in Governance, Leadership & Ethics (GLE).

A graduate of UTM's Commerce program, Jan went on to complete several designations – CPA, CA, C.Dir., APF and CMC, the latter where he was Gold Medalist for the Canadian Association of Management Consultants (2003). His favourite business book is still Competing for the Future, by Hamel and Prahalad, and he enjoys skiing, golf, scuba-diving, white-water kayaking, and strategic investments. His greatest project is having fun with his two daughters who are sixteen and fourteen years-old. In 2006, he was awarded the AIWS designation, joining a worldwide professional group that have completed the Diploma in Wines & Spirits (Dipl.WSET) from the Wine & Spirit Education Trust based in London (U.K.) and is currently on the long road in pursuit of the Master of Wine designation. In 2014, Jan received his Chartered Director's designation offered by the Director's College, Degroote School of Business, McMaster University. Jan serves as Board member and CFO of Corporations for Community Connections, a private foundation of Siemens.

Appendix to Course Outlines: Academic Policies & Regulations Fall/Winter 2022

Pandemic Contingency

Huron will continue to follow the guidance of public health and government officials. It is anticipated that there will be no further disruptions to in-person instruction. This is subject to change.

Student Code of Conduct

Membership in the community of Huron University College and Western University implies acceptance by every student of the principle of respect for the rights, responsibilities, dignity and well-being of others and a readiness to support an environment conducive to the intellectual and personal growth of all who study, work and live within it. Upon registration, students assume the responsibilities that such registration entails. While in the physical or online classroom, students are expected to behave in a manner that supports the learning environment of others. Please review the Student Code of Conduct at:

<https://huronatwestern.ca/sites/default/files/Res%20Life/Student%20Code%20of%20Conduct%20-%20Revised%20September%202019.pdf>.

Prerequisite and Antirequisite Information

Students are responsible for ensuring that they have successfully completed all course prerequisites and that they have not completed any course antirequisites. Unless you have either the requisites for this course or written special permission from your Dean to enroll in it, you may be removed from this course and it will be deleted from your record. This decision may not be appealed. You will receive no adjustment to your fees in the event that you are dropped from a course for failing to have the necessary prerequisites.

Attendance Regulations for Examinations

A student is entitled to be examined in courses in which registration is maintained, subject to the following limitations:

- 1) A student may be debarred from writing the final examination for failure to maintain satisfactory academic standing throughout the year.
- 2) Any student who, in the opinion of the instructor, is absent too frequently from class or laboratory periods in any course will be reported to the Dean of the Faculty offering the course (after due warning has been given). On the recommendation of the Department concerned, and with the permission of the Dean of that Faculty, the student will be debarred from taking the regular examination in the course. The Dean of the Faculty offering the course will communicate that decision to the Dean of the Faculty of registration.

Review the policy on Attendance Regulations for Examinations here: [Academic Calendar - Western University \(uwo.ca\)](#)

Statement on Academic Offences

Scholastic offences are taken seriously and students are directed to read the appropriate policy, specifically, the definition of what constitutes a Scholastic Offence, at the following website: [Academic Calendar - Western University \(uwo.ca\)](#). The appeals process is also outlined in this policy as well as more generally at the following website:

https://www.uwo.ca/univsec/pdf/academic_policies/appeals/appealsundergrad.pdf.

Turnitin.com

All required papers may be subject to submission for textual similarity review to the commercial plagiarism detection software under license to the University for the detection of plagiarism. All papers submitted for such checking will be included as source documents in the reference database for the purpose of detecting plagiarism of papers subsequently submitted to the system. Use of the service is subject to the licensing agreement, currently between The University of Western Ontario and Turnitin.com (<http://www.turnitin.com>).

Statement on Use of Electronic Devices

It is not appropriate to use electronic devices (such as, but not limited to, laptops, tablets, cell phones) in the classroom for non-classroom activities. Such activity is disruptive and distracting to other students and to the instructor, and can inhibit learning. Students are expected to respect the classroom environment and to refrain from inappropriate use of technology and other electronic devices in class.

Statement on Use of Personal Response Systems (“Clickers”)

Personal Response Systems (“clickers”) may be used in some classes. If clickers are to be used in a class, it is the responsibility of the student to ensure that the device is activated and functional. Students must see their instructor if they have any concerns about whether the clicker is malfunctioning. Students must use only their own clicker. If clicker records are used to compute a portion of the course grade:

- the use of somebody else’s clicker in class constitutes a scholastic offence
- the possession of a clicker belonging to another student will be interpreted as an attempt to commit a scholastic offence.

Academic Consideration for Missed Work

All students pursuing academic consideration, regardless of type, must contact their instructors no less than 24 hours following the end of the period of absence to clarify how they will be expected to fulfill the academic responsibilities missed during their absence. **Students are reminded that they should consider carefully the implications of postponing tests or midterm exams or delaying submission of work, and are encouraged to make appropriate decisions based on their specific circumstances.**

Students who have conditions for which academic accommodation is appropriate, such as disabilities or ongoing or chronic health conditions, should work with Accessible Education Services to determine appropriate forms of accommodation. Further details concerning policies and procedures may be found at: <http://academicsupport.uwo.ca/>.

Policy on Academic Consideration for a Medical/ Non-Medical Absence

- (a) **Consideration on Medical Grounds for assignments worth *less than 10%* of final grade:
Consult Instructor Directly and Contact Academic Advising**

When seeking consideration on **medical grounds** for assignments worth *less than 10%* of the final course grade, the student should contact the instructor directly. The student need only share broad outlines of the medical situation. The instructor **may** require the student to submit documentation to the academic advisors, in which case she or he will advise the student and inform the academic advisors to expect documentation. If documentation is requested, the student will need to complete and submit the [Student Medical Certificate](#). The instructor may not collect medical documentation. The advisors will contact the instructor when the medical documentation is received, and will outline the severity and duration of the medical challenge as expressed on the Student Medical Certificate and in any other supporting documentation. The student will be informed that the instructor has been notified of the presence of

medical documentation, and will be instructed to work as quickly as possible with the instructor on an agreement for accommodation.

b) Medical Grounds for assignments worth 10% or more of final grade: Go Directly to Academic Advising

University Senate policy, which can be found at [Academic Calendar - Western University \(uwo.ca\)](https://www.uwo.ca/academic_calendar/) requires that all student requests for accommodation on medical grounds for assignments worth 10% or more of the final grade be made directly to the academic advising office of the home faculty (for Huron students, the “home faculty” is Huron), with supporting documentation in the form (minimally) of the Senate-approved Student Medical Certificate found at:

https://www.uwo.ca/univsec/pdf/academic_policies/appeals/medicalform.pdf.

The documentation is submitted in confidence and will not be shown to instructors. The advisors will contact the instructor when the medical documentation is received, and will outline the severity and duration of the medical challenge as expressed on the Student Medical Certificate and in any other supporting documentation. The student will be informed that the instructor has been notified of the presence of medical documentation, and will be instructed to work as quickly as possible with the instructor on an agreement for accommodation. The instructor will not normally deny accommodation where appropriate medical documentation is in place and where the duration it describes aligns with the due date(s) of assignment(s). Before denying a request for accommodation on medical grounds, the instructor will consult with the Dean. The instructor’s decision is appealable to the Dean.

c) Consideration on Non-Medical Grounds: Consult Huron Support Services/Academic Advising, or email huronsss@uwo.ca.

Students seeking academic consideration for a **non-medical** absence (e.g. varsity sports, religious, compassionate, or bereavement) will be required to provide appropriate documentation. All consideration requests must include a completed [Consideration Request Form](#). Late penalties may apply at the discretion of the instructor.

Please review the full policy on Academic Consideration for medical and non-medical absence at: [accommodation_medical.pdf \(uwo.ca\)](#). Consult [Huron Academic Advising](#) at huronsss@uwo.ca for any further questions or information.

Support Services

For advice on course selections, degree requirements, and for assistance with requests for medical accommodation, students should email an Academic Advisor in Huron’s Student Support Services at huronsss@uwo.ca. An outline of the range of services offered is found on the Huron website at: <https://huronatwestern.ca/student-life/student-services/>.

Department Chairs, Program Directors and Coordinators are also able to answer questions about individual programs. Contact information can be found on the Huron website at: <https://huronatwestern.ca/contact/faculty-staff-directory/>.

If you think that you are too far behind to catch up or that your workload is not manageable, you should consult your Academic Advisor. If you are considering reducing your workload by dropping one or more courses, this must be done by the appropriate deadlines. Please refer to the Advising website, <https://huronatwestern.ca/student-life/student-services/academic-advising/> or review the list of official Sessional Dates on the Academic Calendar, available here: <http://www.westerncalendar.uwo.ca/SessionalDates.cfm>.

You should consult with the course instructor and the Academic Advisor who can help you consider alternatives to dropping one or more courses. Note that dropping a course may affect OSAP and/or Scholarship/Bursary eligibility.

Huron Student Support Services: <https://huronatwestern.ca/student-life/student-services/>

Office of the Registrar: <https://registrar.uwo.ca/>

Student Quick Reference Guide: <https://huronatwestern.ca/student-life/student-services/#1>

Academic Support & Engagement: <http://academicssupport.uwo.ca/>

Huron University College Student Council: <https://huronatwestern.ca/student-life/beyond-classroom/hucsc/>

Western USC: <http://westernusc.ca/your-services/#studentservices>

Wellness and Health Supports at Huron and Western

University students may encounter setbacks from time to time that can impact academic performance. Huron offers a variety of services that are here to support your success and wellbeing. All Huron staff and faculty have received training on responding to disclosures of Gender-Based Sexual Violence (GBSV); students should know that the Community Safety Office is a resource for survivors, providing support and, if desired, guidance while referring them to the further supports that they may require. Please visit <https://huronatwestern.ca/student-life-campus/student-services/wellness-safety> for more information or contact staff directly:

Wellness Services: huronwellness@huron.uwo.ca

Community Safety Office: safety@huron.uwo.ca

Additional supports for Health and Wellness may be found and accessed at Western through, <https://www.uwo.ca/health/>.

Western Calendar - Policy Pages -

[Academic Calendar - Western University \(uwo.ca\)](#)