

Huron

AT WESTERN



Course Outline

MANAGEMENT AND ORGANIZATIONAL STUDIES 3330A OPERATIONS MANAGEMENT

Fall 2018

Course Meets: Wednesdays 8:30a.m. - 11:30a.m. / Classroom W12

Instructors:	Jan Klakurka & Bill Irwin
E-Mail:	ijklakurk@huron.uwo.ca & birwin6@huron.uwo.ca
Webpage:	http://owl.uwo.ca (you need to use your UWO login id and password)
Phone:	(519) 438-7224 ext. 263 (JK-office) / ext. 614 (BI-office) / (289) 644-4199 (JK-voip) / (519) 520-8710 (BI-cell)
Fax:	416-978-5433
Office Hours:	by appointment or Wednesdays 11:30a.m.-12:30p.m.

Course Scope and Mission

Operations is the term that refers to the process by which an organization converts inputs (e.g., labor, material, knowledge, equipment) into outputs (goods and/or services) for both internal and external markets. In this course, we will study how to manage this process. MOS 3330 is an introductory course providing an overview of the operations management concept used as a framework for analyzing operations management situations and as a basis for general management situations. We will study strategic issues related to how firms determine the way in which they will compete as well as tactical and operational decision making. Topics include: scheduling, forecasting and planning, inventory policy, queueing theory, and aggregate planning.

The objectives of this course are:

- to develop your decision-making skills by applying operations management concepts to business situations.
- to expose you to the main concepts of operations management in manufacturing, service, and other organizations that model the expectations of future employers.
- to provide you with useful tools for problem solving in business and government environments.
- to provide you with opportunities to hone and demonstrate effective written & oral communication skills, and strengthen team work abilities.

Course Prerequisites

Prerequisites: 1) the successful completion of Business 2257 and 2) enrolment in the four-year BMOS program.

Required Readings and Materials

1. Heizer, J., Render, B., & Griffin, P., (2016), Operations Management: Sustainability and supply chain management (2nd Cdn. Ed.), Pearson: Toronto, ON

2. IVEY CASE PACKAGE, available for download (see Appendix A)

Course Site: OWL.uwo.ca

Course Method:

Each week, a PowerPoint presentation will be delivered to students covering the material required and testable on the mid-term and final exams. Presentations will be uploaded to OWL prior to class, excluding any solutions to exercise/problems/case analyses. These solutions will be updated following class and the final presentation (for study purposes) will be uploaded to OWL. Following the presentation, class will discuss their pre-prepared solutions to a variety of operations management problems/exercises and business cases to be assigned weekly. Cases from Ivey will also be utilized to facilitate enhanced class participation. Operations management models will be discussed as part of these materials. 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. Class attendance is essential.

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.

		<u>Date</u>
Mid-Term Exam	20%	Oct 31 st , 2018 (Time = 2 hours, in class)
Class Participation	20%	Daily
Site Visit Reflection (2 x 10%)	20%	Class Following Each Site Visit
Group Assignment	20%	December 5 th , 2018 (8:30a.m.)
Take-Home Assessment	20%	Released Dec. 5 th , 2018 & Due Dec. 17 th , 2018

Please submit all work in .pdf, .doc and/or .ppt, as the case may be, to save trees and facilitate use of TTS (text-to-speech) by instructor.

Summary of Important Dates (Other than project deadlines)

September 12, 2018	First Day of Classes for MOS 3330A
October 10, 2018	Reading Week Day Off – No Class
November 12, 2018	Last day to DROP MOS 3330A without academic penalty
December 5, 2018	Last Day of Classes for MOS 3330A
December 17, 2018	Take-Home Assessment Due

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 discussion
- 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 and 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.

The instructor is responsible for your grade in MOS 3330A but not responsible for any administrative decisions that may make use of your grade in MOS 3330A. If you believe that your grade requires review, please follow the procedure above.

Final Take-Home Assessment

The end-of-term take-home case assessment will consist of one brand new operations case and 2-4 short answer/mini scenario/multiple choice-type questions, designed to test your knowledge of the material that is discussed in class sessions and found in the PowerPoints, readings, simulation, plant tours, and case learnings. It will be an assessment you can complete within 4 hours, but you can take more time should you wish. Students will be given access to the Take-Home Case Assessment on the final day of class, December 5th, 2018. There is no final exam in this class. You will be expected to deliver the complete case analysis and accompanying questions by December 17th, 2018 at 11:55pm.

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.

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

Tentative Schedule

<i>Activity</i>	<i>Percentage of Grade</i>	<i>Description</i>
Take-Home Assessment	20%	This open-book, take-home assessment will be equivalent to a 4-hour exam in length and will include a new case study, plus a combination of multiple-choice, true and false, short-answer, essay or computational questions. It may include material from the assigned readings, lectures (PowerPoint presentations), exercises/problems, case studies, videos, small group-work and student presentations. Aides allowed: Open-book, but cited references for additional research undertaken must be provided in an annotated bibliography. Non-case questions will be

Participation	20%	<p>sourced predominantly from post mid-term material, but students must be aware that the final is cumulative so questions from first-half of course are likely to appear as well</p> <p>Preparation for class case discussion, as demonstrated by;</p> <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
Mid-Term Exam	20%	<p>This closed-book exam will be 2-hours in length and may include multiple-choice, true and false, short-answer, essay or computational questions and may include material from the assigned readings, lectures (PowerPoint presentations), exercises/problems, case studies, videos, small group-work and student presentations. Aides allowed: Single Function calculator. Formula sheets will be provided to students for reference during the exam. It will be returned on or before November 5th, 2018.</p>
Field Trip Reflection Reports	20% (2 reports x 10% each)	<p>(2 Individually prepared Field Trip Reports prepared based on the individuals observations, Q&A, interactions, analyses, supplementary research and other relevant information. The Field Trip Reports should describe the purpose of the trip, relate observations and analyses back to course content and learnings, and provide any advice that you would provide to the organization. The Field Trip Reports should also make reference to the historical developments that characterize the company / region and make it unique in terms of its culture and the way it competes through effective & efficient operations in the market.</p> <p>The Field Trip Reports will be handed-in by the class following the field trip (8:30a.m.). The write-up should be no more than five pages (double-spaced, 12-point Arial font) in length, with a maximum of three exhibits. The student should write the Field Trip Reports from their own perspective and may wish to play the role of a consultant engaged externally (or internally) by the organization facing operational challenges whose business issue(s) requires a solution.</p>
Group Assignment	20% (2.5% Proposal, 15% Written Assignment/ Appendices, 2.5% Summary Class Presentation)	<p>A complete firm operations management analysis will be undertaken by groups of three-five (3-5) students from the same section, to be completed by December 5th, 2018. Groups will select an industry to study and described the use of various operations management approaches, tools & techniques for competitive advantage. Groups will work together on their own time and should allocate the work effort evenly to each of the team members. Groups are self-forming and group names should be provided to the professors by the start of session #3. The assignment details are as follows:</p> <p>Objective: Describe the operations management rationale, situation and need(s) giving rise to the competitiveness of a firm (real or imagined) <i>of your choice</i>, including, (1) a detailed and analytical</p>

description of one of the general topics in operations management as it affects your company of choice and its competitors, and; (2) a summary report to the Chief Operations Officer describing the key operations management challenges and opportunities, and reasons thereto, for your company across the broader range of general operations management topics, including actionable recommendations for the COO to better utilize operations management as a competitive advantage. Conduct your analysis from the perspective of where the company and industry have been and grown from (the current environment), where it is today (either at the basic stage of utilize operations techniques through to utilizing the “best-in-class” operations management approaches across all general topic areas, and where it will need to be with its operations for the future. Identify why operations has an impact on this company and what are its prospects for the future. Answer questions *such as, but not limited to*:

- Will this company and industry grow, shrink, and become extinct, as a result of the operational choices made now? How does it define innovation and how is this enabled through world-class operations?
- How is value created for shareholders/other stakeholders in this industry through operations management techniques? Are operations the same in each business unit or jurisdiction in which the company operates?
- What should be done by the company to leverage operations to stay competitive, drive growth, to “creatively destruct” itself? What does this mean for incumbents? For Upstarts?
- What’s the market size for opportunities in this industry over the next several years? Which ones are best? How should operations be designed to take advantage of such lucrative opportunities?
- Which operations processes are central and “core” to this business? Are there any actions that should be removed, outsourced?

Tools: Groups should utilize the textbook, PowerPoint slides Reid companion website, and any other operations management research to structure the written assignment and presentations. Students should be prepared to apply well-known operational frameworks, as deemed necessary, in depth during this group assignment. Analyses will be enhanced by making use of the tools presented during class. The structure of the analysis should include customized versions of several of the models and standardized calculations described in the class to show applicability of the models/approaches to this “real-life” company analysis. These tools will be complemented by an effective presentation and Excel fundamentals discussion, in class, early in the term.

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

- *Proposal:* Due November 7th, 2018 and worth 2.5% of group assignment mark. This proposal will be a 5 double-spaced, 12-point Arial font, page Word document that summarizes the two key

analyses to be undertaken; (1) The General Operations Management Topic Assessment, and; (2) The Detailed Chief Operations Officer (COO) Report on Operations Strategies. An accompanying PowerPoint can also be delivered, if desired additionally. It will include:

- Choice of industry and firm (real or imaginary) to be analyzed and why chosen within the context of operations management?
 - Table of contents of final written report
 - Research tools being utilized and description of project deliverables
 - Roles of each group team member and questions to be answered by analyses
 - Preliminary assessment of their operations and resulting questions to be researched in depth
- *Written Report – The Detailed Chief Operations Officer (COO) Report on Operations Strategies Today & Tomorrow: Due December 5th, 2018 and worth 15% of group assignment mark. This portion of the written report will be 12 double-spaced, 12-point Arial font, pages maximum in Word format providing an overview of each of the operations management issues (strengths & weaknesses) faced by the organization and recommended plans of action in the future to improve the company and align operations with broader corporate goals, using the course tools as required. It will describe and analyze, in a high level of detail, the nature of operations management within your chosen industry, how your selected competitor deals with the selected general operations management topic to enhance competitive positioning and prospects for the future, based on an application of the tools described above and learned during the course. Report to follow proposal Table of Contents.*
 - *Appendices and Exhibits: Due December 5th, 2018 and included in Written Report mark. Not more than ten pages of appendices and exhibits should be included to illustrate results of the analyses undertaken and should include any assumptions made.*
 - *15-Minute Summary Presentation: Completed by all/some members to the class during the final week of class, worth 2.5% of group assignment mark. Presentation should not exceed fifteen slides and should summarize all aspects of both components of the written report. (NB: To expedite presentations by numerous teams in three hours, all summary presentations are to be e-mailed to Jan Klakurka by 7am on December 5th, 2018)*

Total	100%
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Course Work & Academic Honesty

Attendance in Class – Physical presence in class and active engagement in daily discussions is expected of all students. Material presented in class may be testable as part of the evaluations noted above.

Each class will follow a three-part agenda focused on increasing understanding of course material, applying course material and analytical tools to the problems, exercises and/or case, and summarizing our key lessons learned, in a list, for later use (on exams, assignments, etc.). The three areas will be addressed according to the following timeline:

- Topical Discussion of general operational management issues on the PowerPoint slides (required readings), led by Professor with class participation
- Commence Problem, Exercise, and/or Case Discussion(s)
- 5 minute break and time to write on-going formal feedback about the class
- Complete Problem, Exercise, and/or Case Discussion(s)
- Commence Summary Learning Point List Creation
- Class Ends
- Office Hours Commence at 1:30pm for 1 hour (Wednesdays)

A variety of techniques will be used to encourage participation, including “cold-calls”, assigning specific sections of the case analyses at the start of class, and “numbering-off” of all participants to request answers.

NOTE: The consistency of your participation comments, knowledge of the previously-delivered material, and test/assignment results will be addressed holistically. Students should prepare all weekly cases and assignments individually to maximize their learning and demonstrate the required level of understanding of the material.

Students and professor at the end of the class will list summary learning points. These points will be important study notes for future

Respect for fellow students, the professor, and all field trip hosts is expected and mandatory (see Standard of Conduct section below) and required to encourage participation by all. Respect will further ensure that all relevant case concepts are raised, therefore increasing the depth of the analysis and discussion. Respect encompasses the following concepts:

- Attend all classes and arrive on time
- Allow and encourage others to participate
- Refrain from “cat-calls” or derogatory comments – if students disagree with an analysis or comment, it is fully expected that counter arguments will be presented in a clear, concise, and professional manner
- Coming to class prepared, including having read the case in detail and having prepared any relevant analysis yourself
- Inappropriate or immature conduct during an exam situation will automatically result in a grade of zero. An example will be slamming classroom door during exam.
- All field trips are mandatory. You will conduct yourself with complete professionalism and maturity at all times, acting as an ambassador for Huron, Western, and your class. Any inappropriate or immature behavior will result in an automatic grade of zero on your Field Trip Summary and negatively affect your participation mark.

Notwithstanding that each class will include both lecture and assignments, the breakdown of sessions by week will generally follow the approach noted below:

- Most weeks, a new chapter will be presented during the first one-and-a-half to two hours of class. The second hour-plus, will consist of working through a business case from the case package as a class and/or in small groups. You are expected to prepare in advance for the class, including reading the entire chapter as well as the Solved Problems and Discussion Questions. I will review key information using PowerPoint slides as well as pertinent examples, videos and anecdotes. You are expected to participate in the discussion to maximize your learning and earn participation marks.

Group Involvement: For the group assignment, groups should allocate the work evenly among each team member. All team members should be familiar with all aspects of the materials developed and presented. A single mark will be awarded to each member of a group. Groups should meet after hours to complete their group assignment, discuss findings, determine applicable textbook and resource guide approaches to use, analyze results, develop the written report and appendices, and rehearse their final group presentation. Groups can determine if each member will speak during the final presentation or if a single spokesperson will present or some derivation thereof. Groups will self-select and self-manage. All students must have a group by the time of the presentation, or they receive a mark of zero for the project. Students unable to join a group on their own should immediately inform the Professor of the need for assistance in procuring a group. The Professor may arbitrarily assign additional group members as needed to balance group weights and ensure students do not remain without a group allowing for maximum student group contribution.

Feedback to Instructors: Please send any written or oral feedback to the instructor whenever you feel it is necessary. After session #2, I will ask for your written feedback (just use a blank piece of paper) on any issues you have or things you want to see addressed in the class. This feedback should be confidential, so there is no need to provide your name unless you feel you would like to do so. This type of feedback will then be welcomed at any point during the term. The feedback will be addressed and used to improve the course and your learning experience. During the mid-point of term, a formal feedback survey will be conducted on Zoomerang seeking your feedback on the course to-date with a view to implementing suggestions for improvement for the second part of term.

Submission of Assignments - Late submissions of any assignment may be considered; however, a resolution may be determined at the Professor's sole discretion and may include an academic penalty.

Standard of Conduct in this Course

Since this course is part of a degree designed to give you a broad understanding of the world of business, we aim to run the course in a way which will be consistent with the world of business - where many of you will spend your working lives. We strive to provide accurate information, quality materials and good service, consistent with our obligations to maintain the high academic standards of Huron University College and Western University.

In return we expect that you will conduct yourself in a way that prepares you for the world of work. Papers are due when originally assigned as due. Cases & homework answers are to be prepared fully in advance.

- 1 We start on time, so please do not arrive late and disrupt others.
- 2 Leaving class early is also disruptive to your colleagues and will not be permitted unless you have made prior arrangements with the instructor.
- 3 Turn off your cell phone, pager, and watch alarm.
- 4 Keep up to date. Make sure that you know the class schedule. Check on the course web page for updates and posted materials.
- 5 During the class, respect the learning opportunities of others. Don't distract others by chatting to your neighbour. Our expectation is that you will not only contribute in class to your own learning, but also to that of others.

Given that there are multiple sections across campus, please understand that with limited seats in the assigned classroom, those students registered in the section always maintain first right to a seat and priority in classroom space. You are allowed to move between sections provided that you are not taking a seat of a peer already registered in the section. Also, slight variations may be expected between the lecture and/or problem/exercise/case discussion(s), depending on the nature of participation, class discussion, and/or Professors' choice.

Email

At times, the course instructor may decide to communicate important course information by email. As such, all Huron University College students are required to have a valid huron.uwo.ca or UWO email address. You are responsible for ensuring that your university email address is set up.

Forwarding your huron.uwo.ca email to a Hotmail, Gmail, Yahoo or other type of email account is not advisable. In some cases, messages from huron.uwo.ca addresses sent to Hotmail, Gmail or Yahoo, etc. accounts are filtered as junk mail, which means that important messages from your course instructor may end up in your spam or junk mail folder.

MOS 3330A Tentative Course Schedule (Note: Additional required and/or supplementary readings may be assigned weekly on OWL to be prepared before class for in-class discussion)

NB:

- All questions are found in the text at the back of each chapter and all cases are to be downloaded from the Ivey website; both are to be prepared in advance of class
- Text chapters refer to the chapter ordering presented in the Western University customized version of the Heizer et al. textbook used in this course. Figure and question/answer references in the customized textbook reflect numbering in original non-customized version.
- Text contains solutions to many odd-numbered problems which will be utilized for self-study, therefore each week students should complete all even-numbered problems, in advance of class, which will be discussed in class (please note that for later chapters, certain even numbered questions will require you to complete the odd-numbered problem in order to proceed)
- The Internet case is a term-long case that progresses with each general topic covered in the text and lectures. Students should consider preparing the online question responses and we will make occasional use of the cases as basis of illustrating various concepts
- Questions designated as student hand-in questions are identified in *bold/italics* in the list below.

Tentative Schedule

Session	Date	Topic	Chapter(s) & Exercise/Problems/Case
1	Sep 12, 2018	<ul style="list-style-type: none"> • <i>Course Overview & Intros</i> • <i>Introduction to Operations Management</i> • Supply Chain Management (SCM) and e-Business • Changing SCM landscapes 	<ul style="list-style-type: none"> • Text: Ch. 1-2 • Questions/Problems: 1.5, 1.9, 1.13, 2.1, 2.5 • Case: SUPPLY CHAIN MANAGEMENT AT WAL-MART (Ivey casepack) • Exercise: Lego Tower Building
2	Sep 19, 2018	<ul style="list-style-type: none"> • Inventory Management 	<ul style="list-style-type: none"> • Text: Ch. 12 • Questions/Problems: 12.3, 12.9, 12.15, 12.25 • Case: QUANTICO COMPUTERWARE LTD. (Ivey casepack)
3	Sep 26, 2018	<ul style="list-style-type: none"> • Forecasting • Capacity • <i>Group Assignments Due (3-5 students)</i> 	<ul style="list-style-type: none"> • Text: Ch. 4 & Supplement 7 • Questions/Problems: 4.1, 4.9, 4.33, S7.7, S7.13 • Case: GREAVES BREWERY: BOTTLE REPLENISHMENT (Ivey casepack)
4	Oct 3, 2018	<ul style="list-style-type: none"> • Aggregate Planning 	<ul style="list-style-type: none"> • Text: Ch. 13 • Questions/Problems: Even Numbers 13.3, 13.7, 13.15, 13.7 • Case: AGGREGATE PLANNING AT GREENMILLS (Ivey casepack)
	Oct 10, 2018	<ul style="list-style-type: none"> • READING WEEK 	<ul style="list-style-type: none"> • NO CLASSES
5	Oct 17, 2018	<ul style="list-style-type: none"> • Plant Tours (Field Trips in London) 	<ul style="list-style-type: none"> • 3M London –TOUR
6	Oct 24, 2018	<ul style="list-style-type: none"> • Resource Planning (Materials Requirements Planning (MRP) & Enterprise Resource Planning (ERP)) 	<ul style="list-style-type: none"> • Text: Ch. 14 • Questions/Problems: 14.3, 14.5, 14.13, 14.25 • Game: Beer Game
7	Oct 31, 2018	<ul style="list-style-type: none"> • <i>Mid-Term Exam (2 hours)</i> 	<ul style="list-style-type: none"> • All course textbook, PowerPoint, exercise/problem/case material covered to date will be testable on the mid-term exam
8	Nov 7, 2018	<ul style="list-style-type: none"> • <i>Group Proposal Due</i> • Scheduling & Sequencing 	<ul style="list-style-type: none"> • Group Proposal Presentations • Text: Ch. 15 • Questions/Problems: 15.5, 15.11, 15.15, 15.17 • Simulation: Benihana (HBS)

9	Nov 14, 2018	<ul style="list-style-type: none"> Product Design & Process Selection Just-in-Time (JIT) and Lean Systems 	<ul style="list-style-type: none"> Text: Ch. 5, 7, 11 & 16 Questions/Problems: 5.9, 7.11, 11.11, 16.3, 16.9 Case: BELLE INC. (Ivey casepack)
10	Nov 21, 2018	<ul style="list-style-type: none"> Plant Tours (Field Trips in London) 	Diamond Aircraft / Forked River Brewery –TOURS
11	Nov 28, 2018	<ul style="list-style-type: none"> Total Quality Management (TQM) Statistical Quality Control (SPC) 	<ul style="list-style-type: none"> Text: Ch. 3, 6, & 6 Supplement Questions/Problems: 3.3, 3.7, 3.13, 3.21, S6.7, S6.19, S6.29 Case: LONGXI MACHINERY WORKS - QUALITY IMPROVEMENT (A) (Ivey casepack)
12	Dec 6, 2017	<ul style="list-style-type: none"> Take-Home Assessment Released (Due: Dec. 17th, 2018) Project Management Six Sigma <i>Group Assignment Due</i> <i>Group Presentations, Q&A</i> 	<ul style="list-style-type: none"> Reading: Meredith, J. & Mantel, S. (2012), Ch.'s 2 & 5 Questions/Problems: 6.3, 6.9, 6.13 Review text and/or case questions/problems <i>sent in advance to Professors</i> Group Final Presentations All course textbook, PowerPoint, exercise/problem/case material will be testable on the final exam with emphasis on second-half of course (since mid-term)

About Your Lecturers

Jan Klakurka is Director and tenure-track Assistant Professor in Management and Organizational Studies at Huron University College, Western University and long-standing Instructor within the strategy department at the Rotman School of Management, University of Toronto. Jan's professional designations include: C. Dir., CPA, CA, APF and CMC, the latter where Jan was past Canadian Association of Management Consultant's Gold Medalist for Canada. He 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 six more in academia. 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: 2012-2018), Huron (2014-2018), and Laurier (2013-2015). Jan's other core teaching courses are *International Business* (2012-2018, including MBA in 2014) and *Management Consulting* at Rotman School of Management (2011-2019) He also regularly teaches *Introduction to Management* at Rotman Commerce (2011-2018). In 2014, he began teaching a Summer Abroad course for Rotman/UofT at Masaryk University In Brno, Czech Republic called *Strategy in*

the European Context that is going into its six year. 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.

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 twelve and ten years-old. In 2006, he was awarded the AIWS designation, joining 3,500 others worldwide 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, and on the finance committee of the Mansfield Ski Club.

Bill Irwin is an Assistant Professor, tenure track, at Huron University College in the Department of Management and Organizational Studies. He also instructs Program and Policy Evaluation at Western University in the Department of Political Science in the Masters in Public Administration Program, and Educational Evaluation in the MEd program at the Faculty of Education. He has published eight peer review articles to date and has two more articles under review. In February 2017 he published a co-edited book on program evaluation and is currently working on a new book on strategic planning. He has two chapters published in peer reviewed books and is working on a third. Prior to returning to the academy in 2007, he spent the previous 20 years in a variety of leadership positions in community and public sector organizations. Irwin's future research interests centre

on issues of policy, leadership, community engagement, and organizational effectiveness. He is interested as well in exploring models of program and policy evaluation focused on qualitative evaluation, outcome and impact analysis, and administrative management. Of principal interest to him is the interplay between institutions and community. Irwin regularly speaks on the topic of evaluation and metrics, policy development, and administration and management at a variety of Canadian and International professional and academic conferences and workshops. His current research is supported by: a \$45,000 grant from the Ontario Library Association, a \$21,000 grant from the Rural Ontario Institute, a \$20,000 grant from the Association of Municipalities of Ontario, and a \$2500 grant from Huron University College.

APPENDIX A: Ivey Casepack Ordering Instructions

Dear Student,

You have registered for:
Course: Operations Management
Professor(s): Jan Klakurka
Starting: Aug 10, 2018
Ending: Dec 31, 2018

This message explains how to purchase the course materials needed for your class which are available on Ivey Publishing's website.

Go to the Coursepack link: <https://www.iveycases.com/CoursepackView.aspx?id=19815>

You will need to [log in](#) or [create an account](#). Once you have done so, you can choose to purchase a print or digital copy of the coursepack. Coursepacks are PDF documents that can be opened using Adobe Reader. Digital coursepacks may be opened and printed for a period of 30 days from the time you complete your purchase; once downloaded to your computer, you will have digital access until the course end date. If you want to keep these materials beyond this time frame, you will need to print the coursepack. **This coursepack is for your personal use only and is not to be shared or distributed in any form.**

I hope you find this a convenient way to get your required course materials. If you have any questions, please contact me at jkklakurk@huron.uwo.ca.

Thank you,
Jan Klakurka

For technical assistance, please contact Ivey Publishing during business hours.

Ivey Publishing
Ivey Business School
Western University
(e) cases@ivey.ca | (f) 519-661-3882
(t) 519-661-3208 | (tf) 800-649-6355

<https://www.iveycases.com/>

Digital Download Support:
[Instructions for opening your first PDF](#)
[Instructions for Mac users](#)

Hours of Operation:
Monday to Thursday: 8:00am-4:30pm (EST)
Friday: 8:00am-4:00pm (EST)

Instructions for Ordering Harvard Business School Publishing Simulation:

Click the link to order the simulation: <https://hbsp.harvard.edu/import/557709>



Appendix to Course Outlines

Prerequisite Information

Students are responsible for ensuring that they have successfully completed all course prerequisites. Unless you have either the requisites for this course or written special permission from your Dean to enrol 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.

Conduct of Students in Classes, Lectures, and Seminars

Membership in the community of Huron University College and the University of Western Ontario 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. The academic and social privileges granted to each student are conditional upon the fulfillment of these responsibilities.

In the classroom, students are expected to behave in a manner that supports the learning environment of others. Students can avoid any unnecessary disruption of the class by arriving in sufficient time to be seated and ready for the start of the class, by remaining silent while the professor is speaking or another student has the floor, and by taking care of personal needs prior to the start of class. If a student is late, or knows that he/she will have to leave class early, be courteous: sit in an aisle seat and enter and leave quietly.

Please see the *Code of Student Rights and Responsibilities* at:

<http://www.huronuc.ca/CurrentStudents/StudentLifeandSupportServices/StudentDiscipline>

Technology

It is not appropriate to use technology (such as, but not limited to, laptops, cell phones) in the classroom for non-classroom activities. Such activity is disruptive and is 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.

Academic Accommodation for Medical/Non-Medical Grounds

Students who require special accommodation for tests and/or other course components must make the appropriate arrangements with the Student Development Centre (SDC). Further details concerning policies and procedures may be found at:

http://www.sdc.uwo.ca/ssd/?requesting_acc

- (a) **Medical Grounds for assignments worth 10% or more of final grade: Go Directly to Academic Advising**

University Senate policy, which can be found at

http://www.uwo.ca/univsec/pdf/academic_policies/appeals/accommodation_medical.pdf,

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:

http://www.uwo.ca/univsec/pdf/academic_policies/appeals/medicalform_15JUN.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.

**(b) Accommodation on Medical Grounds for assignments worth less than 10% of final grade:
Consult Instructor Directly**

When seeking accommodation 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. 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. 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) Non-medical Grounds: Consult Instructor Directly

Where the grounds for seeking accommodation are not medical, the student should contact the instructor directly. Late penalties may apply at the discretion of the instructor. Apart from the exception noted below, academic advisors will not be involved in the process of accommodation for non-medical reasons.

Where a student seeks accommodation on non-medical grounds where confidentiality is a concern, the student should approach an academic advisor with any documentation available. The advisors will contact the instructor after the student's request is received, and will outline the severity and duration of the challenge without breaching confidence. The student will be informed that the instructor has been notified that significant circumstances are affecting or have affected the student's ability to complete work, and the student will be instructed to work as quickly as possible with the instructor on an agreement for accommodation. Before denying a request for accommodation where documentation has been submitted to an academic advisor, the instructor will consult with the Dean. The instructor's decision is appealable to the Dean.

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 Web site:

http://www.uwo.ca/univsec/pdf/academic_policies/appeals/scholastic_discipline_undergrad.pdf

Statement on Academic Integrity

The International Centre for Academic Integrity defines academic integrity as "a commitment, even in the face of adversity, to five fundamental values: honesty, trust, fairness, respect, and responsibility. From these values flow principles of behaviour that enable academic communities to translate ideals to action." (CAI Fundamental Values Project, 1999).

A lack of academic integrity is indicated by such behaviours as the following:

- Cheating on tests;
- Fraudulent submissions online;
- Plagiarism in papers submitted (including failure to cite and piecing together unattributed sources);
- Unauthorized resubmission of course work to a different course;
- Helping someone else cheat;
- Unauthorized collaboration;
- Fabrication of results or sources;
- Purchasing work and representing it as one's own.

Academic Integrity: Importance and Impact

Being at university means engaging with a variety of communities in the pursuit and sharing of knowledge and understanding in ways that are clear, respectful, efficient, and productive. University communities have established norms of academic integrity to ensure responsible, honest, and ethical behavior in the academic work of the university, which is best done when sources of ideas are properly and fully acknowledged and when responsibility for ideas is fully and accurately represented.

In the academic sphere, unacknowledged use of another's work or ideas is not only an offence against the community of scholars and an obstacle to academic productivity. It may also be understood as fraud and may constitute an infringement of legal copyright.

A university is a place for fulfilling one's potential and challenging oneself, and this means rising to challenges rather than finding ways around them. The achievements in an individual's university studies can only be fairly evaluated quantitatively through true and honest representation of the actual learning done by the student. Equity in assessment for all students is ensured through fair representation of the efforts by each.

Acting with integrity at university constitutes a good set of practices for maintaining integrity in later life. Offences against academic integrity are therefore taken very seriously as part of the university's work in preparing students to serve, lead, and innovate in the world at large.

A university degree is a significant investment of an individual's, and the public's, time, energies, and resources in the future, and habits of academic integrity protect that investment by preserving the university's reputation and ensuring public confidence in higher education.

Students found guilty of plagiarism will suffer consequences ranging from a grade reduction to failure in the course to expulsion from the university. In addition, a formal letter documenting the offence will be filed in the Dean's Office, and this record of the offence will be retained in the Dean's Office for the duration of the student's academic career at Huron University College.

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.

Computer-marked multiple-choice tests and/or exams may be subject to submission for similarity review by software that will check for unusual coincidences in answer patterns that may indicate cheating.

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:

- ³⁵/₁₇ the use of somebody else’s clicker in class constitutes a scholastic offence,
- ³⁵/₁₇ the possession of a clicker belonging to another student will be interpreted as an attempt to commit a scholastic offence.

Policy on Special Needs

Students who require special accommodation for tests and/or other course components must make the appropriate arrangements with the Student Development Centre (SDC). Further details concerning

policies and procedures may be found at:

http://www.sdc.uwo.ca/ssd/?requesting_acc

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.

Class Cancellations

In the event of a cancellation of class, every effort will be made to post that information on the Huron website, <http://www.huronuc.ca/AccessibilityInfo> (“Class Cancellations”).

Mental Health @ Western

Students who are in emotional/mental distress should refer to Mental Health @ Western <http://www.uwo.ca/uwocom/mentalhealth/> for a complete list of options about how to obtain help.

Academic Advising

For advice on course selections, degree requirements, and for assistance with requests for medical

accommodation [see above], students should contact an Academic Advisor in Huron's Student Support Services (huronsss@uwo.ca). An outline of the range of services offered is found on the Huron website at: <http://www.huronuc.ca/CurrentStudents/AcademicAdvisorsandServices>

Department Chairs and Program Directors and Coordinators are also able to answer questions about their individual programs. Their contact information can be found on the Huron website at: <http://www.huronuc.ca/Academics/FacultyofArtsandSocialScience>