

GBUS 874 – Cases in Leadership
Summer Session 2018: July 8-12
Course Syllabus

“The function of the University is to enable you to shed details in favor of principles.”
Alfred North Whitehead, *Principius Mathematica*

Class Time: - M-Fri 08:30 to 16:30 - ED 514.
Instructor: Ron Camp II, Ph.D.
Office: Education Building, Room ED 540.2
Phone: 337-2387
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Office Hours:

I will be available to discuss readings and assignments starting Monday, June 18. Feel free to e-mail me to schedule an appointment at a mutually agreeable time. You can reach me by email at ronald.camp@uregina.ca with questions you have regarding the course prior to July 8.

Special Needs:

If there is any student in this course who, because of a disability, may have a need for accommodations, please come and discuss this with the professor, as well as contacting the Coordinator of Special Needs Services at 585-4631.

OVERVIEW:

This course is designed to provide a basic introduction to leadership by focusing on what it means to be a good leader. Emphasis in the course is on the practice of leadership. The course will examine topics such as: developing leadership skills, creating a vision, setting the tone, handling conflict, overcoming obstacles, and addressing ethics in leadership. Attention will be given to helping students to understand and improve their own leadership performance. This one week module is intended to provide you with different perspectives on leadership and the ways in which the concept of “Leadership” differs from that of “Management”. The emphasis of the course will be on case studies which will allow us to examine leadership through the conceptual lenses supplied by the assigned readings. The emphasis will be on looking at management (broadly defined) and organizations as complex socio-technical systems.

The main goal for this course is to provide students with an *understanding of the theory and concepts* underlying the practice of leadership. A secondary goal for this course is for students to develop the basic *decision-making skills* associated with leadership. In order to facilitate these goals, students will be exposed to a variety of information and experience through readings and business cases.

OUTCOMES OF THE COURSE:

- Students will gain *through self-assessment questionnaires* an awareness of their own leadership philosophy, traits, skills, and behaviors.
- Students will gain *through real-world observation exercises* an understanding of the fundamental ways leadership is practiced in on-going organizations.
- Students will gain *through reflection and action activities* an understanding and appreciation for the unique dimensions of their own leadership style, their strengths and weakness, and ways to improve what they do as leaders.

ABILITY AREAS:

1. Leadership Knowledge & Skills

- A. **Leadership vs Management:** Students will gain a basic understanding of some of the main roles, skills, and tasks associated with leadership and management and be able to differentiate between the two.
- B. Students will be familiar with the three main functions of leadership as defined by Kotter, Directing, Aligning, and Motivating. They will be able to define how these functions should be used in various organizational situations as demonstrated in case memos and discussions.
- C. Students will be able to demonstrate basic leadership skills in setting an organizational vision, providing alignment through feedback, and motivating improved performance for individuals and teams.
- D. **Organizational Environment and Leadership:** Students will gain a basic understanding of the effect of volatile, uncertain, complex and ambiguous (VUCA) environments on organizational performance, mental health of employees, and the effective approaches to the practice of leadership.

2. Communications:

- A. **Written:** Students will demonstrate an ability to create professional documents (professional memos and training materials).
- B. **Oral:** Students will demonstrate an ability to make short presentations.

3. Interpersonal/Leadership Skills:

Students, through a series of case-based role playing/simulation exercises, will develop skills in providing alignment and motivation through performance feedback. Furthermore, students will demonstrate an ability to exercise informal leadership through participation in class discussions and exercises.

4. Ethics:

Students will recognize the importance of ethics and ethical issues in leadership and the decision making process.

ASSIGNMENTS, READINGS, & EXERCISES:

You will be working primarily from the readings and cases listed below. Concepts and their application may appear simple on the surface, but typically are more subtle, complex and difficult to apply. To understand the material covered in this course, it is crucial that you **read the ARTICLES and the CASES BEFORE JULY 12** so that you can contribute thoughtfully to and learn from the class discussions and exercises. It is also essential that you note and prepare these assignments prior to class meetings in the manner indicated by the syllabus. It is also important that you re-read each case before the class date when it will be discussed.

Leadership (change – volatility/uncertainty/ambig.)	Management (complexity)
Set direction	Plan & budget
Align people	Organize & staff
Motivate/inspire	Control, solve problems

REQUIRED READINGS:**TEXT:**

Peter G. Northouse (2018) *Introduction to Leadership: Concepts and Practice, Second Ed.* Thousand Oaks, CA: Sage

ARTICLES:

- Bernstein (2015) “Leadership and Teaming, Module Note.” Harvard Business School. HBS Note 414-033-PDF-ENG
- Carmeli, Brueller, and Dutton. (2009). “Learning Behaviours in the Workplace: The Role of High Quality Relationships and Learning in the Workplace” *Systems Research and Behavioral Science*, 26: 81-98. <https://onlinelibrary.wiley.com/doi/pdf/10.1002/sres.932>
- Collins, J. & Poras, J. (1991). “Organizational vision and visionary organizations.” *California Management Review*, 34(1): 30-52. <https://journals.sagepub.com/doi/pdf/10.2307/41166682>
- Duan, Krishnan, and Weddle. (2017) “The yin and yang of organizational health.” *McKinsey Quarterly*.
- Edmondson (2002). “Managing the risk of learning: Psychological safety in work teams.” Forthcoming in West, M. (Ed) *International Handbook of Organizational Teamwork*, London: Blackwell.
- Edmondson (1999) Psychological safety and learning behavior in work teams.” *Administrative Science Quarterly*, 44: 350-383. <https://journals.sagepub.com/doi/pdf/10.2307/2666999>
- Eichfeld, Golding, Hamilton, and Robinson (2017) “Continuous improvement: Make good management every leader’s daily habit.” *McKinsey & Company*.
- Fergus & Carleton (2016) Intolerance of uncertainty and attentional networks: Unique associations with alerting.” *Journal of Anxiety Disorders*, 41: 59-64. <https://doi.org/10.1016/j.janxdis.2016.03.010>
- Garvin & Margolis. (2014). “A Note on Seeking, Receiving, and Giving Advice.” *Harvard Business School*. HBS Note 9-314-071
- Hirak, Peng, Carmeli, & Schaubroeck. (2012) “Linking leader inclusiveness to work unit performance: The importance of psychological safety and learning from failures.” *The Leadership Quarterly*, 23: 107–117. <https://www.sciencedirect.com/science/article/pii/S104898431100172X>
- Kanter, Rakesh Khurana (2010) “Advanced Leadership Note- An Institutional Perspective and Framework for Managing and Leading.” *Harvard Business School*. 9-410-076-PDF-ENG
- Kotter (2001) “What Leaders Really Do.” *Harvard Business Review*. R0111F-PDF-ENG
- Nembhard and Edmondson. (2006) “Making it safe: The effects of leader inclusiveness and professional status on psychological safety and improvement efforts in health care teams.” *Journal of Organizational Behaviour*, 27, 941–966. <https://onlinelibrary.wiley.com/doi/pdf/10.1002/job.413>

Sutton. (2017). "Memo to the CEO: Are you the source of workplace dysfunction?" *McKinsey Quarterly*.

Tucker & Edmondson (1999) "Why hospitals don't learn from failures: Organizational and Psychological Dynamics that Inhibit System Change." *California Management Review*, 45(2): 55-72. https://journals.sagepub.com/doi/pdf/10.2307/41166165?casa_token=PLvzAk4lnZ8AAAAA:9U0XpMBslre4-B8yp5fHS7fULQPv2JYOOmYnbwypj9NXzDj9_aImlLv1THgF9QWWoOAcVnGfu8

Van Den Steen (2014) "Strategy and the Strategist." *Harvard Business School. HBS Note 713533-PDF-ENG*

CASES:

Beer & Vargas. (2011) "Celeritas, Inc- Leadership Challenges in a Fast-Growth Industry" Harvard Business School. HBS Case 4360-PDF-ENG.

Team leadership: sales decline, lost market share, consultant team building

Bernstein & Buell (2015) "Trouble at Tessei." Harvard Business School. HBS Case 615044-PDF-ENG

Leadership & motivation: capability & coordination, transparency strategy

MacMillan & Woodwark (2012) "House Hearth and Home- Managing Leadership Change." Ivey School of Business Case 9B12C048

L-T Manager still the right person? Maintain change while respecting loyalty

PERFORMANCE COACHING

Mayo & Margolis (2012) "Mary Griffin at Derby Foods." Harvard Business School. HBS Case 412040-PDF-ENG

Performance feedback: performance vs interpersonal skills

Mayo & Margolis. (2012) "Danielle Marcoux at AdNet2Win Technologies." Harvard Business School. HBS Case 412039-PDF-ENG.

Control on design process, not allow difficult issues / challenges

Mayo & Margolis. (2012) "Michael Lester at Lachlan Consulting." Harvard Business School. HBS Case 412041-PDF-ENG

Advice re managing client

Mayo & Margolis. (2012) "Ramesh Patel at Aragon Entertainment Limited" Harvard Business School. HBS Case 412042-PDF-ENG

Hi potential EE – confront colleague on behavior

Weick (1993) "The Collapse of Sensemaking in Organizations: The Mann Gulch Disaster." *Administrative Science Quarterly*, 38(4): 628-652.

https://www.jstor.org/stable/pdf/2393339.pdf?casa_token=xMeMHU0O6FAAAAAA:hRSfv3CHldejuMksn23NWZgA0iv5ZMaxGInv5G6iSudF7yhDkIFGI2ZTrwTBhZUFd27qZnszQKIXJRu3G6WC0ORjjhbgavtp0aYYNeYW4DAANCpKCA

GRADING

1. Case Analysis Write-Ups – (30% of course grade)

Students must complete three homework case assignments. For each of these three assigned cases you will be required to prepare a 2-page (maximum) written case analysis. The first draft write-up, regarding “Celeritas, Inc.,” is due at the **beginning of the class on July 8**. During class we will draft group memos for Celeritas. Completed group memos are due at the **beginning of class on Tuesday, July 9**. The second case memo, regarding “Trouble at Tessei,” is due at the beginning of the case discussion at **12:45 on Tuesday, July 9**. (Keep a copy of the write-ups for the class discussion.) During class we will draft group memos for Celeritas. Completed group memos are due at the beginning of class on Wednesday, July 10. The third case memo, for “House, Hearth & Home – Managing Leadership Change”, is due at **08:30 on Friday, July 12**.

Follow a traditional case format, for example:

To: Phillip Boyer, CEO, Celeritas
From: Student Name
Subject: Identifying and overcoming sources of resistance

Each memo should be typed, double-spaced, using 12-point Times-Roman font, and with 2.5 cm margins. Unless otherwise indicated in class, memos should consist of three parts. The first part (1/2 page) is a summary of one immediate issue in the case. In this section, briefly identify one main issue/point/problem raised in the case that is germane to the readings and the assigned case questions. In this section fully describe who was involved, doing what, in what sequence, with whom and the outcomes that chain of events resulted in. The second (1/2 page) part of the write-up is your analysis. In this section, briefly explain how the case issue described above relates to the specific course concepts. Explain how or why these issues are significant from a leadership perspective. The third part (1 page) consists of your recommendations. Based on the case questions and specific issues you addressed in the previous two sections, briefly outline one possible solution/action for this case. For each write-up assume that you are a consultant writing a memo to the key decision maker in the case. What should the decision maker in the case do? (Additional directions may be provided for each case write-up on UR Courses.)

For all other assigned cases, submit a one paragraph case summary at the start of the case discussion.

2. Reading Summaries (10% of course grade):

Each student is required to complete 20 summaries of the course readings (book chapters and articles). Each summary should be one page long. Each completed article summary is worth 1/2 point.

For each entry, the first section (The Idea in Brief) will summarize the content of the source, presenting its overarching thesis. What is the main content of the source? If this is a research article, what types of evidence does the author use? What is the author’s main viewpoint/argument? How does the source relate to other relevant sources?

The second section (Implications for Applying the Ideas) will provide practical advice for applying the main ideas. This assignment is due at the beginning of class on Monday, **July 8, 2019**.

Sample Summary:

Schein, E. H. (Fall 1996). “Three cultures of management: The key to organizational learning.” *Sloan Management Review*, 38(1)

The Idea in Brief

Every organization includes three key subcultures of management: Operator (front-line supervisors), Engineering (middle management, including managers & directors), and Executive (including vice presidents and chief officers). “The three communities of executives, engineers, and operators do not really understand each other very well. A lack of alignment among the three groups and their core assumptions can hinder learning in an organization,” and cause change to fail.

Operator Culture

The operator culture is an internal organizational culture based on operational success:

- Organizational success depends on people’s KSAs and commitment (especially at the level of line units).
- KSAs required for success are “local” and based on the organization’s core technologies.
- No system is perfect. Operators must be able to learn and deal with surprises.
- Complex operations are non-linear, involve complex interdependencies, and often defy simple, quantitative explanations. Operators must work as a collaborative team.

Engineering Culture

The engineering culture is world-wide, composed of the designers and technocrats who drive an organization’s core technologies. Its key assumptions include the following:

- “Engineers” are proactively optimistic that they can and should master nature.
- “Engineers” are pragmatic perfectionists who prefer “people free” solutions.
- The ideal world is one of elegant machines and processes without human intervention.
- “Engineers” over-design for safety.
- “Engineers” prefer linear, simple, cause-and-effect, quantitative thinking.

Executive Culture

The executive culture is a world-wide occupational community focused on capital markets:

- **Financial Focus -**
 - Financial survival and growth to ensure returns to “shareholders” and to society.
- **Self-Image: The Embattled Lone Hero**
 - Hostile, competitive environment where the CEO is isolated, yet in total control.
 - Executives must trust their own judgment.
- **Hierarchical and Individual Focus**
 - Organization hierarchy is the primary means of maintaining control.
 - The organization must be a team, but accountability must be individual.
 - Experimenting and risk taking only to permit the executive to stay in control.
- **Task and Control Focus**
 - Large organizations must be run by rules, routines (systems), and rituals
 - Ideal world is one in which the organization performs like a well-oiled machine.
 - People are a necessary evil, not an intrinsic value.

Implications for Applying the Ideas

Organizations will not learn effectively until they recognize and confront the implications of these three cultures and their differences: stimulate communication that fosters a greater level of mutual understanding. In communicating change to each of these audiences, recognize and communicate to deeply embedded (tacit), shared assumptions of executives, engineers, and operators.

Leadership Case with Teaching Note (40%): Using the Case Writing Worksheet found in the URCourses page for GBUS 874, develop your own 8-10 page leadership case plus teaching note (additional tips and advice for writing a case are found in the additional documents in **Topic 2: Original Case Assignment**, *How to Write a Case Study*, *Case Writing Checklist* and *Case Sample*). Follow the *Case Sample* for the Teaching Note format. Take a topic and, based on your observations and experience, analyze a leadership situation at work or a situation you are otherwise familiar with, using concepts, tools, etc. identified in your annotated bibliography and through course presentations and discussions. The case should lead the reader to apply these concepts, tools, etc. to make a leadership decision or a set of recommendations (e.g. this could be a case on how a leader creates stress for his/her staff and what he/she can do through the application of appropriate leadership principles to alleviate this stress). If interviewing or distributing a questionnaire to gain information for writing the case be sure to follow ethical guidelines for conducting research with human subjects. This includes getting informed consent for using the information they provide to you (see *Sample Consent Form*). See information in *How to Write a Case Study* for options on anonymizing the names of the people in your case. Cases are due via e-mail by **17:00 (5:00 pm) on Friday, August 16**.

3. Class Participation – (20% of course grade)

Students are expected to prepare for each class and to participate fully. Participation, defined broadly, includes attendance both in class and group meetings. High levels of participation would include active participation in class discussions (especially when that involves drawing others into the discussion) and might also include bringing information from outside sources (work/life experience, journal/magazine/newspaper articles, books, etc.) that enrich the learning experience of the class.

Marks for classroom contribution will be allocated in the following manner:

Exceeds Expectations

17-20 Students in this category **provide leadership** in the classroom and work toward enhancing the interpersonal dynamics of the class. Rather than dominating the setting, they act as facilitators, bringing others into the discussion, drawing out participation of fellow students and challenging thinking.

Input into conversations about cases, concepts, tools, techniques, etc. demonstrates exemplary knowledge and understanding of the subject material, relevant issues, literature, and techniques. Input demonstrates integrative and synthetic insight, understanding and independent application or extension of course content. Case discussion demonstrates a superior to exceptional level of analytical and critical ability demonstrating independent application of unique and multi-perspective solutions to complex problems related to the subject material. This means demonstrating an ability to cope with different, though interdependent, issues in an integrative way.

Meets Expectations

14-16 For showing an active interest in class activities and participating in classroom discussions; for regularly making insightful comments which help others to understand the course material; for being a positive group member, etc.

Input into conversations about cases, concepts, tools, techniques, etc. demonstrates good to very good knowledge and understanding of the subject material, relevant issues, literature, and techniques. Input demonstrates insight, understanding and an ability to apply course content to leadership issues raised in course discussions. Case discussion demonstrates a good to very good level of analytical and critical ability demonstrating independent application of appropriate solutions to individual problems related to the subject material.

Does not Meet Expectations

10-13 For attending class on a regular basis and only occasionally contributing to the classroom experience.

< 10 For failing on all of the previously identified ways of contributing.

Participation Quality. To facilitate active participation by everyone, it is important that class members have a shared vision of what constitutes a contribution.

Contribution can be and is:

- Making observations that integrate concepts and discussions.
- Citing relevant personal examples.
- Asking key questions that lead to revealing discussions.
- Engaging in devil's advocacy: Disagreeing with the instructor when the difference of opinion serves as both counterpoint and a way of exploring all sides of a concept, issue, or practice.
- Working with others to come to a common understanding of the topics – in and out of the classroom.
- Pulling your own weight in group work and participating enthusiastically in classroom group activities: Being an active participant in group discussions.

By extension, contribution is not continuously dominating class and group discussions. It also means listening to what others say – they have a right to contribute (and you may even learn something!).

ACADEMIC ISSUES**LATE ASSIGNMENTS**

Points will be deducted from late assignments.

MISCONDUCT

As per the university's handbook for students, each student is expected to do his/her own work and to refrain from engaging in any dishonest activity. This includes both giving and receiving assistance on exams and/or plagiarism on assignments. Any instance of academic misconduct, which includes using unauthorized materials for assistance during quizzes or exams or any testing period (this includes electronic translators – paper versions of dictionaries may be used), or misrepresenting another person's work to be your own, may result in immediate expulsion from the class, with a permanent grade of **XF** being placed on your transcript: the definition of XF on the transcript shows you were failed as a result of academic misconduct, and the course will count as a grade of zero toward your GPA. There is no discretion in this matter for the instructor. The Associate Dean for Graduate Studies handles these cases.

	Monday, July 8	Tuesday, July 9	Wednesday, July 10	Thursday, July 11	Friday, July 12
8:30	Leadership Framework Duan et al (2017) Kanter et al (2010) Kotter (2001) VUCA	<i>Celeritas</i> group case memo due Set Direction: Strategy Van den Steen (2014)	<i>Tessei</i> group case memo due Align: Leading Teams Ch 9: Diversity & Inclusion Ch 10: Out-Group Members Bernstein (2015) Team Roles Chapter Cases: <i>What's in a Name?</i> <i>Next Step</i>	Ch 11: Managing Conflict Yost – Breakthrough Thinking Chapter Case: <i>Office Space</i>	House, Hearth... case memo due Leadership & Uncertainty Edmondson (1999) Fergus & Carleton(2016) Sutton (2017) Tucker & Edmondson (1999) Case: Mann Gulch
9:45	Break	Break	Break	Break	Break
10:00	Leadership Framework Ch 4: Philosophy & Styles, Ch 5: Tasks & Relationships Ch 6: Leadership Skills Ch Case: <i>Sweet Caroline's</i>	Align: Continuous Improv Carmelli et al (2009) Eichfeld et al (2017) Yost – Continuous Improvement Framework	Motivate: Psych Safety Ch 8: Constructive Climate Edmondson (2002) Hirak et al (2012) Nembhard Edmondson 2006	Case: <i>Wendy Peterson</i>	Case: Collapse of Sensemaking in Organizations: The Mann Gulch Disaster
11:45	Lunch	Lunch	Lunch	Lunch	Lunch
12:45	Set Direction: Vision Ch 7: Creating a Vision Collins & Poras (1991)	Case: <i>Trouble at Tessei</i> <i>Tessei</i> draft case memo due	Align: Feedback Coaching Roadmap Garvin Margolis (2014)	Ch 12: Ethics in Leadership Case: <i>House, Hearth & Home – Managing Leadership Change</i>	Ch 13: Overcoming Obstacles Case: <i>Jamie Turner at MLI</i>
2:15	Break	Break	Break	Break	Break
2:30	Case: <i>Celeritas Inc. – Leadership Challenges in a Fast-Growth Industry</i> <i>Celeritas</i> draft case memo due	Case: <i>Trouble at Tessei</i>	Cases – Giving Feedback <i>Mary Griffin</i> <i>Danielle Marcoux</i> <i>Michael Lester</i> <i>Ramesh Patel:</i>	Discussion: Synthesis and integration of key leadership concepts	Discussion: Synthesis and integration of key leadership concepts
4:30	End	End	End	End	End

DRAFT

Reading Summaries: Due July 8, 2019

Own Case: Due 17:00 (5:00 pm) on Friday, August 16, 2019