



**MANAGEMENT AND ORGANIZATIONAL STUDIES 4489A 550**  
**STRATEGIC FORESIGHT AND FUTURING**  
Fall 2020

Course Meets: Tuesdays 1:30p.m. to 4:20p.m. / Classroom: Online Synchronous via Zoom

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Instructor:	Jan Klakurka
E-Mail:	<a href="mailto:ijklakurk@huron.uwo.ca">ijklakurk@huron.uwo.ca</a>
Webpage:	<a href="http://owl.uwo.ca">http://owl.uwo.ca</a> (you need to use your UWO login id and password)
Phone:	(519) 438-7224 ext. 263 / 289-644-4199 (Dell Voice)
Fax:	416-978-5433
Office Hours:	Tuesday at 4:30pm-5:30pm online via Zoom or by appointment

### **Course Scope and Mission**

This course examines the future and how organizations, institutions, society and individuals can prepare for it. In this course, students will explore the discipline of strategic foresight, being introduced to the tools and techniques of understanding, conceptualizing, and communicating alternative viewpoints of the future. Acting as “student-futurists”, students will undertake scanning activities to accumulate cross-disciplinary data and assess trends. They will learn about scenario planning and ways to articulate various alternative views of the future. Students will take a systems-wide approach, applying critical thinking, to help them better understand the points of integration across their future organizations and broader parts of society. Finally, students will integrate their evolving understanding of the future to holistically plan how organizations – and their employees, stakeholders and the societies in which they operate – succeed in reaching their goals through anticipation, design and implementation of novel approaches and techniques that generate sustainable advantages. Students will apply an ambidextrous mindset that can be later taken to their organizations and personal lives to understand the context of emerging trends, effect on personal and corporate aspirations, and impact on societal norms.

### **Course Prerequisites**

1) Business 2257; and ; 2) Enrolment in 3rd or 4th Year of BMOS Degree programme, or; permission of the Chair of MOS.

(Please Note: Unless you have the prerequisites for this course, 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).

### **Required Readings and Materials**

*The Future: A Very Short Introduction*, Gidley, J. Oxford University Press, 2017, 978-0198735281

Each week, a PowerPoint presentation will be delivered to students covering the material required and testable on the assignments. Strategic models will be discussed as part of these materials. Case learning points will be summarized weekly, as key “take-aways” from the class discussion. Various foresight games will be played over the course of term, including The Thing From the Future. Other materials the instructor wishes to hand-out will be distributed on an as-needed basis.

### 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.

20%	Class Participation	-	Daily
10%	Futures Studies Literature -		October 6, 2020
20%	Trend-spotting Assignment	-	October 20, 2020
5%	Horizon Scanning Log	-	December 8, 2020
25%	Scenario Planning Project -		November 17, 2020
20%	Group Aspirational Foresight Report	-	December 8, 2020

All assignments must be submitted within the Assignment section of OWL and receive a grade in order for students to pass this course.

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

### **Summary of Important Dates (Other than project deadlines)**

September 15, 2020 -	First Day of Classes for MOS 4489A
November 12, 2020 -	Last day to DROP MOS 4489A without academic penalty
December 8, 2020 -	Last Day of Classes for MOS 4489A

**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
- Draw similarities to previous learnings and demonstrates their relation to the current case scenario being discussed

Not coming to class equates to a zero for that class. Only coming to class and not speaking is considered very weak participation. Best practice participation includes reading materials in advance, making insightful contributions, and completing any required analysis and/or homework, among other aspects.

**Grade review:** The instructor does not discuss grades without a substantive reason. Substantive reasons include errors made during grading. If you would like a re-evaluation of your grade in any component of the course, you should follow the proscribed procedures as set out in the document available through your Academic Counselor. The suggested procedure is as follows:

- (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 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.
- (d) Individuals cannot request a re-evaluation of group work. Such a request should come in writing from the group jointly.

The instructor is responsible for your grade in MOS 4489A but not responsible for any administrative decisions that may make use of your grade in MOS 4489A. If you believe that your grade requires review, please follow the procedure above.

### Requirements and Criteria

Performance in the course will be evaluated using a variety of methods that support the objectives identified above. A combination of assignments, individual participation, group presentation, **active** critical dialogue, involvement and decision-making within seminar-style discussions, and in-class 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 with due dates shown above and within the course schedule below:

<i>Activity</i>	<i>Percentage of Grade</i>	<i>Description</i>
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<b>Futures Studies Literature Review</b>	10%	Students should conduct a review of a futures-studies or strategic foresight-focused academic paper published in the past three years. Students should conduct a search for academic papers that resonate with their particular interest areas. A full review of the paper should be conducted and assessment prepared of 3-5 pages in length. An accompanying summary of the paper attributes (e.g. abstract, key words, themes, etc.) should be prepared in prescribed format (.xls template to be provided by Prof. Klakurka). Each student should select a unique paper. Paper selection will be done on a first-come, first-served basis. To avoid duplication, as soon as students have chosen a paper to review, they should notify Prof. Klakurka by e-mail and their fellow classmates via OWL.
<b>Participation</b>	20%	Preparation for class case discussion, as demonstrated by; <ul style="list-style-type: none"> <li>• willingness to lead and actively participate class discussions in a professional manner verbally and within Zoom chat room</li> <li>• providing valuable insights and analysis</li> <li>• responding to “cold-calls”</li> <li>• Using Zoom to share personal PowerPoint / Excel spreadsheets to present analyses and findings</li> <li>• Verbal participation is worth more than chat participation, while chat is worth more than simply giving “thumbs up” emoji’s / participation in online polls</li> <li>• Attending synchronous sessions is very important for participation; only when substantial hurdles exist (such as very unreliable bandwidth in a remote location) should students not attend; students must let the professor know if they will not be attending</li> </ul> In addition, each week 1-2 students will be asked to give an impromptu 1-2 minute presentation on a random topic provided by the Professor. Students will have 5 minutes to prepare their speech. Each student will be called upon once during term. Occasionally, students will be given exercises to prepare in advance of class. A random number of students may be called upon to present such analyses.
<b>Trend Spotting Assignment</b>	20%	Students should use the tools discussed in class, augmented with the own research skills and personal interest areas, to conduct a comprehensive trend-spotting exercise culminating in an approximately 8-10 page report highlighting an emerging trend. In conducting this research paper, students will attempt to make sense of the future direction of events and circumstances, including defining unknowns and “Black Swans”. Students must go beyond definition of the trend to effectively articulate its potential impacts of this trend across various stakeholders.
<b>Horizon Scanning Log</b>	5%	During the term, students are expected to be actively scanning the environment. Students should keep a log, of their own design and structure, to catalogue the trends they have identified during the term.

<b>Scenario Planning Project</b>	25%	Students should select an organizational unit (e.g. company, non-profit, institution, society-at-large, etc.) on which to develop four (4) scenarios for 2050. Students will be expected to develop unique alternative possible states of the future based on trends and scanning activities, research, assumptions, wild cards, etc. Each scenario must be articulated in a robust narrative scenario designed to inform / communicate to stakeholders the characteristics of each scenario. For each scenario, students should highlight how stakeholders would measure in the future to understand whether any of these four, or other, scenarios are in fact evolving into existence.
<b>Group Aspirational Foresight Project</b>	20%	Working in small groups of 2-3 individuals, students will conduct a strategic foresight analysis of a company (or other organization) within a broader industry. Imagining they are employees of this real organization, students will select the company on their own and utilize a variety of foresight and futuring techniques of their choice to outline a plan for the organization's and their personal aspirational futures. Students should design their aspirational future based on anticipated information, but with a normative lens to creating an organizational-employee-society state of "win-win-win". While students may decide to utilize an utopian lens, a more realistic lens that balances various constituencies is encouraged. Students will write a report of approximately 15-20 pages and make a presentation in class of 10-15 minutes in length.
<b>Total</b>	<b>100%</b>	

## **POLICY AND PROCEDURE**

### **Missed Assignments**

Students who miss a test or assignment for reasons entirely beyond their control (e.g. illness) may submit a request for special consideration. Provided that notification and documentation are provided in a timely manner, and that the request is subsequently approved, no academic penalty will be applied.

In such cases, students must notify their Academic Counsellor on the date of the missed test (or due date in the case of course work) and submit supporting within one week of the originally scheduled test or due date. Students who do not provide their Academic Counsellor or the instructor with appropriate or sufficient supporting documentation will be given a grade of 0 (zero).

**Note that the physician's report must establish that the patient was examined and diagnosed at the time of illness, not after the fact. Academic Counsellors will not accept a statement that merely confirms a report of illness made by the student and documented by the physician.**

### **Course Work & Academic Honesty**

**Attendance in Online Class** – Physical online 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.

Cameras should be on and microphones muted. Students should turn their microphones on as soon as they are called upon or when they wish to “jump into” the online verbal dialogue. Once done speaking, students should re-mute themselves on Zoom.

Each class will follow a three-part agenda focused on increasing understanding of course material, applying course material and analytical tools to the 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 on the PowerPoint slides (required readings), led by Professor with class participation
- Sharing of scanning “hits” and new information discussion
- Two ten-minute breaks each hour and time to write on-going formal feedback about the class
- Commence Summary Learning Point List Creation
- Class Ends

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 assignment results will be addressed holistically. Students should prepare all weekly readings 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 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 Zoom 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

**Zoom Meetings:** A recurring meeting will be used to hold weekly class calls. A class-specific Zoom meeting ID and password will be separately provided on OWL. It may be accessed and used by registered students only.

**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. Fifteen percent (15%) of your group project mark (equivalent to 3% of overall mark) will be based on results of a peer review survey developed, delivered and interpreted by the Instructor. So, work well together and actively contribute.

A new Group Work contract has been developed for MOS courses and will be utilized by groups to ensure consistent and fairly distributed work effort planning and execution throughout term.

**The Group Foresight Project** requires students to work in teams of 2-3.

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 and you are therefore reminded of the following expectations with respect to behaviour and contributions to your team project.

1. When working in a team, 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 differences:

Conflicts can – and do – occur. Conflicts are part of the team’s process of learning how to work together effectively and can actually generate exciting debate and creative solutions – if managed appropriately.

Student teams are collectively expected to resolve disputes or misunderstandings as soon as they arise (and prior to submission of the final project). In cases where teams are unable to reach a mutually agreeable solution, the entire team must meet with the professor as soon as possible – NOT IN THE LAST WEEK AFTER IT’S TOO LATE. The Professor 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.

### **Feedback to Instructor**

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 using the Western Student Opinion Survey seeking your feedback on the course to-date with a view to implementing suggestions for improvement for the second part of term.

During the final weeks of term, you are requested to complete the Student Opinion survey when made available by the Faculty of Arts & Social Sciences.

### **Submission of Assignments**

All assignments are due at the beginning of class on the date specified in the course outline. Late submissions of any assignment may be considered; however, a resolution may be determined at the instructor's discretion and will include an academic penalty of 2%/day off the grade otherwise obtained. Students who, for reasons beyond their control, are unable to submit an assignment by its deadline must obtain approval from the instructor for an extension. Supporting documentation will be required as per the policy on missed tests and assignments.

### **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 foresight, 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.

- 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.

### **Accessibility Needs**

Huron University College is committed to accessibility. If you require accommodations for a disability, or have any accessibility concerns about the course, the classroom or course materials, please contact Accessibility Services as soon as possible.

### **Academic Integrity**

Academic Integrity is a fundamental value essential to the pursuit of learning and scholarships at the Huron University College. Participating honestly, respectfully, responsibly, and fairly in this academic community ensures that the Western degree that you earn will continue to be valued and respected as a true signifier of a student's individual work and academic achievement. As a result, the University treats cases of academic misconduct very seriously.

*The University's Code of Behaviour on Academic Matters*

You are expected to be familiar with the contents of the Code. Potential offences include, but are not limited to:

In papers and assignments:

- Using someone else's ideas or words without appropriate acknowledgement.
- Submitting your own work in more than one course without the permission of the instructor.
- Making up sources or facts.
- Obtaining or providing unauthorized assistance on any assignment (this includes collaborating with others on assignments that are supposed to be completed individually).

On test and exams:

- Using or possessing any unauthorized aid, including a cell phone.
- Looking at someone else's answers
- Misrepresenting your identity.
- Submitting an altered test for re-grading.

Misrepresentation:

- Falsifying institutional documents or grades.
- Falsifying or altering any documentation required by the University, including (but not limited to), medical notes.

If you have any question about what is or not is permitted in the course, please do not hesitate to contact the course instructor. If you have any questions about appropriate research and citation methods, you are expected to seek out additional information from the professor or other Huron/Western resources.

**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](mailto: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](mailto: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](mailto: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.

**OWL and the Course Page**

The online course page for this course is accessed through OWL. To access the course page, go to the OWL login at <https://owl.uwo.ca/portal> and log in using your UWO login name and password. Once you have logged in, look for the MOS 4489A - 2019 module where you'll find the link to all course materials.

**Recording Lectures**

Lectures and course materials prepared by the instructor are considered by the University to be an instructor's intellectual property covered by the Canadian Copyright Act. Zoom audio files will be made available on Zoom for two weeks following the synchronous class session. No student or other party has right to post the audio or any class video files on social media, internet sites, cloud services (other than personal OWL account for their solitary use), peer-to-peer file sharing services, or other such sites. Audio files are not to be copied. Students wishing to record a lecture or other course material in any way other than the Zoom provided are required to ask the instructor's explicit permission, and may not do so unless permission is granted (note: students who have been previously granted permission to record lectures as an accommodation for a disability are, of course, excepted). This includes tape recording, filming, photographing PowerPoint slides, OWL materials, etc.

If permission is granted by the professor, it is intended for the individual student's own study purposes and does not include permission to "publish" them in any manner. It is absolutely forbidden for a student to publish an instructor's notes to a website or sell them in any other form without formal written permission.

**MOS 4489A 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 readings are available online or on the UWO library. They will be available on the OWL course site under fair use provisions for universities, but cannot be reproduced. Any cases will be provided by instructor, as required.**

Session	Date	Topic	Chapter
1	Sept 15, 2020	<ul style="list-style-type: none"> <li>Course Overview and Introductions</li> <li>Introduction to Foresight &amp; Futuring</li> </ul>	<ul style="list-style-type: none"> <li><b>Text:</b> Introduction</li> </ul>
2	Sept 22, 2020	<ul style="list-style-type: none"> <li>Mega and Micro Trends</li> <li>Drivers of the Future</li> <li>Millennium Goals</li> </ul>	<ul style="list-style-type: none"> <li><b>Text:</b> Ch. 1</li> <li><b>Reading:</b> Globally Scanning for "Megatrends of the Mind": Potential Futures of Futures Thinking, Jennifer M. Gidley, <i>Futures</i>, 2010</li> <li><b>Website:</b> Millennium Project</li> </ul>
3	Sept 29, 2020	<ul style="list-style-type: none"> <li>Scanning</li> <li>Weak Signals</li> </ul>	<ul style="list-style-type: none"> <li><b>Reading:</b> Web-based horizon scanning: concepts and practice, Palomino et al, <i>Foresight</i>, VOL. 14 NO. 5 2012, pp. 355-373</li> </ul>
4	Oct 6, 2020	<ul style="list-style-type: none"> <li>Three Horizons Model</li> <li>Sensemaking</li> <li><b><i>Futures Studies Literature Review Due</i></b></li> </ul>	<ul style="list-style-type: none"> <li><b>Reading:</b> An Overview of the Horizons Foresight Method, Peter Padbury, Policy Horizons Canada, March 2018</li> </ul>
5	Oct 13, 2020	<ul style="list-style-type: none"> <li>Tools of Foresight</li> <li>Delphi</li> </ul>	<ul style="list-style-type: none"> <li><b>Text:</b> Ch. 2</li> <li><b>Reading:</b> An Overview of Four Futures Methodologies, Lang, <i>Hawaii Futures</i></li> </ul>

6	Oct 20, 2020	<ul style="list-style-type: none"> <li>• Scenario Planning</li> <li>• Narrative Storytelling</li> <li>• <b>Trend-spotting Assignment Due</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Text:</b> Ch. 3</li> <li>• <b>Reading:</b> Living in the Futures (Angela Wilkinson &amp; Roland Kupers, 2013), <i>HBR</i></li> </ul>
7	Oct 27, 2020	<ul style="list-style-type: none"> <li>• Alternative Futures</li> <li>• Creativity</li> <li>• Implications Across Society</li> </ul>	<ul style="list-style-type: none"> <li>• Text: Ch. 4</li> <li>• <b>Reading:</b> Creativity and dysfunction in strategic processes: The case of scenario planning, MacKay &amp; McKiernan, <i>Futures</i>, 2009</li> </ul>
8	Nov 3, 2020	<ul style="list-style-type: none"> <li>• <b>Fall Reading Week</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>NO CLASSES HELD</b></li> </ul>
	Nov 10, 2020	<ul style="list-style-type: none"> <li>• Systems Thinking</li> <li>• Design Thinking</li> <li>• Governance</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Reading:</b> Applying Design Thinking to Your Business, Roger Martin, HBR, Nov. 2009</li> <li>• <b>Reading:</b> Gertler M. and Wolfe, D.A. 2004. "Local social knowledge management: community actors, institutions and multilevel governance in regional foresight exercises", <i>Futures</i>, 36:1, 45-65</li> </ul>
9	Nov 17, 2020	<ul style="list-style-type: none"> <li>• Technology Futures</li> <li>• <b>Scenario Planning Assignment Due</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Text:</b> Ch. 5</li> <li>• <b>Reading:</b> Blockchain and Value Systems in the Sharing Economy: The illustrative Case of Backfeed; Alex Pazaitis, Primavera De Filippi, Vasilis Kostakis, <i>Technological Forecasting and Social Change</i>, Volume 125, 2017, 105-115</li> </ul>
10	Nov 24, 2020	<ul style="list-style-type: none"> <li>• Strategic Foresight in Organizations</li> <li>• Visioning</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Reading:</b> Corporate foresight and its impact on firm performance: A longitudinal analysis, René Rohrbeck &amp; Menes Etingue Kumd, <i>Technological Forecasting and Social Change</i>, Available online 2 January 2018</li> </ul>
11	Dec 1, 2020	<ul style="list-style-type: none"> <li>• People Side of Foresight</li> <li>• Values in Management</li> <li>• The Future of the Academy</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Text:</b> Ch. 6</li> <li>• <b>Reading:</b> Being without Existing, Riel Miller, <i>Foresight</i>, VOL. 13 NO. 4 2011, pp. 24-34</li> </ul>
12	Dec 8, 2020	<ul style="list-style-type: none"> <li>• Envisioning a Normative Future</li> <li>• Aspirational Futures</li> <li>• <b>Group Foresight Report Due</b></li> <li>• <b>Group Presentations</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Reading:</b> Aspirational Futures, Clem Bezold, Institute for Alternative Futures USA, <i>Journal of Futures Studies</i>, May 2009, 13(4): 81 - 90</li> <li>• <b>Text:</b> Conclusion</li> <li>• Group Presentations</li> </ul>

**Jan Klakurka** is Chair of 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: 2012-2020), Huron (2014-2021), and Laurier (2013-2015). Jan's other core teaching courses are *International Business* (2012-2020, including MBA in 2014) and *Management Consulting* at Rotman School of Management (2011-2021) which he brought to Huron (2016-2017). He also regularly teaches *Introduction to Management* at Rotman Commerce (2011-2019). 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 seventh year. Jan was awarded the Excellence in Teaching Award at Rotman in 2017 and multiple past years. 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 thirteen and eleven years-old. In 2006, he was awarded the AIWS designation, joining wine experts 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 is founding partner at Elevae Strategic Advisory and serves as Board member and CFO of Corporations for Community Connections, Inc. a private foundation of Siemens, and on the finance committee of the Mansfield Ski Club.

## Appendix to Course Outlines



### Appendix to Course Outlines: Academic Policies & Regulations 2020 - 2021

#### **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 enrol in it without them, you may be removed from this course and it will be deleted from your record. If you enrol in this course despite having already taken an antirequisite you may be removed from this course and it will be deleted from your record. Removals for these reasons 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 or for having already taken the antirequisites.

#### **Conduct of Students in Classes, Lectures, and Seminars**

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. The academic and social privileges granted to each student are conditional upon the fulfillment of these responsibilities.

While in the physical classroom or online 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 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: enter and leave quietly. Please see the Code of Student Conduct at:

[www.huronuc.on.ca/sites/default/files/pdfs/Code%20of%20Student%20Conduct.pdf](http://www.huronuc.on.ca/sites/default/files/pdfs/Code%20of%20Student%20Conduct.pdf).

#### **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 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.

#### **Adding / Dropping Courses**

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 Huron website, <https://huronatwestern.ca/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.

### **Class Cancellations**

In the event of a cancellation of class, every effort will be made to post all relevant information on the OWL class site and on the Huron website at, <https://huronatwestern.ca/about/accessibility>.

### **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.

Please see the policy on Attendance Regulations for Examinations here: [https://www.uwo.ca/univsec/pdf/academic\\_policies/exam/attendance.pdf](https://www.uwo.ca/univsec/pdf/academic_policies/exam/attendance.pdf).

### **Academic Student 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](mailto:huronsss@uwo.ca). An outline of the range of services offered is found on the Huron website at: <https://huronatwestern.ca/academic-advising>.

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/contact-directory>.

### **Copyright Regarding Course Material**

Lectures and course materials, including PowerPoint presentations, tests, outlines, and similar materials are protected by copyright. Faculty members are the exclusive owner of copyright in those materials they create. Students may take notes and make copies for their own use. Students may not allow others to reproduce or distribute lecture notes and course materials publicly (whether or not a fee is charged) without the express written consent of a faculty member. Similarly, students own copyright in their own original papers and exam essays. If a faculty member is interested in posting a student's answers or papers on the course website he/she should ask for the student's written permission.

### **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, it is also 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.**

### **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, as per the Academic Calendar: [http://www.westerncalendar.uwo.ca/PolicyPages.cfm?PolicyCategoryID=1&Command=showCategory&SelectedCalendar=Live&ArchiveID=#SubHeading\\_189](http://www.westerncalendar.uwo.ca/PolicyPages.cfm?PolicyCategoryID=1&Command=showCategory&SelectedCalendar=Live&ArchiveID=#SubHeading_189) .

### **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 (<https://www.turnitin.com/>).

### **Computer-Marked Tests/exams**

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.

### **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 Accommodation for Students With Disabilities**

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://academicsupport.uwo.ca/>.

Please review the full policy at,

[https://www.uwo.ca/univsec/pdf/academic\\_policies/appeals/Academic%20Accommodation\\_disabilities.pdf](https://www.uwo.ca/univsec/pdf/academic_policies/appeals/Academic%20Accommodation_disabilities.pdf).

### **Academic Consideration for Missed Work**

Students who are seeking academic consideration for missed work during the semester may submit a self-reported absence form online provided that the absence is 48 hours or less and the other conditions specified in the Senate policy at

[https://www.uwo.ca/univsec/pdf/academic\\_policies/appeals/Academic\\_Consideration\\_for\\_absences.pdf](https://www.uwo.ca/univsec/pdf/academic_policies/appeals/Academic_Consideration_for_absences.pdf) are met.

Students whose absences are expected to last longer than 48 hours, or where the other conditions detailed in the policy are not met (e.g., work is worth more than 30% of the final grade, the student has already used 2 self-reported absences, the absence is during the final exam period), may receive academic consideration by submitting a Student Medical Certificate (for illness) or other appropriate documentation (for compassionate grounds). The Student Medical Certificate is available online at [https://www.uwo.ca/univsec/pdf/academic\\_policies/appeals/medicalform.pdf](https://www.uwo.ca/univsec/pdf/academic_policies/appeals/medicalform.pdf).

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.

### **Requests for Academic Consideration Using the Self-Reported Absence Form**

Students who experience an unexpected illness or injury or an extenuating circumstance (48 hours or less) that is sufficiently severe to temporarily render them unable to meet academic requirements (e.g., attending lectures or labs, writing tests or midterm exams, completing and submitting assignments, participating in presentations) should self-declare using the online Self-Reported Absence portal. This option should be used in situations where the student expects to resume academic responsibilities within 48 hours or less.

Please note the following conditions that are in place for self-reporting of medical or extenuating circumstances:

- Students will be allowed a **maximum of two self-reported absences** between September and April and one self-reported absence between May and August;
- Any absences in excess of the number designated in clause a above, regardless of duration, will require students to present a **Student Medical Certificate (SMC)**, signed by a licensed medical or mental health practitioner, detailing the duration and severity of illness, or appropriate

documentation supporting extenuating circumstances to the Academic Counselling unit in their Faculty of registration no later than two business days after the date specified for resuming responsibilities.

- Self-reported absences will not be allowed for scheduled final examinations; for midterm examinations scheduled during the December examination period; or for final lab examinations scheduled during the final week of term.
- Self-reporting may not be used for assessments (e.g. midterm exams, tests, reports, presentations, or essays) worth more than 30% of any given course.
- Students must be in touch with their instructors **no later than 24 hours after the end of the period covered by the Self-Reported Absence form**, to clarify how they will be expected to fulfil the academic expectations they may have missed during the absence.

Please review the full policy at,

[https://www.uwo.ca/univsec/pdf/academic\\_policies/appeals/accommodation\\_illness.pdf](https://www.uwo.ca/univsec/pdf/academic_policies/appeals/accommodation_illness.pdf) .

### **Policy on “Academic” Accommodation - Medical / Non-Medical Grounds**

- (a) **Medical Grounds for assignments worth 10% or more of final grade: Go directly to Huron Support Services/ Academic Advising, or email [huronsss@uwo.ca](mailto:huronsss@uwo.ca) .**

University Senate policy, which can be found at,

[https://www.uwo.ca/univsec/pdf/academic\\_policies/appeals/accommodation\\_medical.pdf](https://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:

[https://www.uwo.ca/univsec/pdf/academic\\_policies/appeals/medicalform.pdf](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.

- (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 Huron Support Services/ Academic Advising**

Where the grounds for seeking accommodation are not medical (e.g. varsity sports, religious, compassionate, bereavement) the student should contact an academic advisor directly. All accommodation requests must include a completed [Accommodation Request Form](#). Late penalties may apply at the discretion of the instructor.

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.

**Mental Health & Wellness Support 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. 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](mailto:huronwellness@huron.uwo.ca)

Community Safety Office: [safety@huron.uwo.ca](mailto:safety@huron.uwo.ca)

Chaplaincy: [gthorne@huron.uwo.ca](mailto:gthorne@huron.uwo.ca)

Additional supports for Health and Wellness may be found and accessed at Western through, [www.uwo.ca/uwocom/mentalhealth/](http://www.uwo.ca/uwocom/mentalhealth/).

**Important Dates & Directory**

For a current and up-to-date list of important dates and campus directories, please visit:

- **Huron – Important Dates:** <https://huronuc.ca/important-dates-and-deadlines>
- **Academic Calendar & Sessional Dates:** <http://www.westerncalendar.uwo.ca/SessionalDates.cfm>

- **Huron Directory – Faculty, Staff and Administration:** <https://huronuc.ca/index.php/contact/contact-directory>
- **Western Directory – Faculty, Staff and Administration:** <https://www.uwo.ca/directory.html>