

# TED ROGERS SCHOOL

## Entrepreneurship & Strategy

# ENT 501

## Family Business in Canada

*Our goal is to provide students with a deeply experiential and transformative learning experience in a vibrant urban environment. We empower students with a philosophy of entrepreneurial thinking, passion, and action-orientation that they can apply to their lives, their jobs, their communities, and/or their own new ventures.*

*We ignite students' passions and empower them to achieve extraordinary goals. Canada's pre-eminent and largest entrepreneurship program, we deliver innovative educational programs and support multi-disciplinary experiences across campus with local, national and global impact. We provide access to world-class support and funding for our students' new ventures and are embedded within our community.*



# ENT 501: Family Business in Canada

2022, Fall

Friday's from 10am to 2pm in MAIN-ENG-ENG101

## Instructor Information

---

<b>Instructor/GA:</b>	Francesco Barbera	Jessica Turetken
<b>E-mail Address:</b>	<a href="mailto:francesco.barbera@ryerson.ca">francesco.barbera@ryerson.ca</a>	<a href="mailto:jessica.turetken@ryerson.ca">jessica.turetken@ryerson.ca</a>
<b>Office Location:</b>	TRS 1-048	Via Zoom
<b>Office Hours:</b>	By appointment only	By appointment only

## Course Description

---

Planning, Succession and Control. Students will study many of Canada's internationally known family-run businesses. They will learn about the challenges faced by the owners in planning and succession as well as the impact that family structure plays in determining the future of the firm. Key issues to be examined include the relationship between ownership and management, the strategic planning process, succession planning, technical and management skills, support structures, funding, leadership and the family structure.

## Course Details

---

### Teaching Methods

The course will be taught weekly and by way of an in-person, lecture format. The class will be taught over an approximate 90-minute session each week, unless noted as an exception. Weekly quizzes will be made available prior to each week's session. Introduction of concepts will be proved using a combination of required readings, lecture slides, and optional readings/videos and selected concepts. Important announcements and supplementary materials will be provided via D2L. The course will also make extensive use of the required textbook as well as the associated MindTap portal. These will be required. Students are expected to complete assignments, present a group project and be able to discuss family business cases which form part of the required readings. Please note, physical attendance is necessary to experience the live sessions, as they will not be recorded.

## Additional Comments

- Professional communication is expected; extremely poor writing may incur a grade of zero.
- Professional behavior during live sessions is expected. You are expected to arrive on time and participate in all classes. Missing four or more sessions during the course, without permission/official explanation, may result in failure of the course.
- It is your responsibility to clarify any ambiguities that you may find in the course materials or syllabus; when in doubt, ask.

## Course Materials

Required Text: Poza, Ernesto and Daugherty, Mary (2018). *Family Business, Fifth Edition*. Cengage Learning ISBN: 978-1-337-39876-3

Students will also need a MindTap course key to access the interactive e-book and the resources that accompany it. Here is the relevant information:

- Course Link URL: <https://login.nelsonbrain.com/course/MTPN7KRZJ6SB>
- Course Key: MTPN-7KRZ-J6SB

Any additional reading will be provided on D2L. Readings are to be completed PRIOR to the class indicated. Submission of assignments is to occur by the date and time indicated on D2L. Late submissions will not be accepted, unless prior arrangements have been confirmed with the instructor for medical or other valid reasons.

**Note:** This course will heavily rely upon D2L and the online MindTap platform. Please click on the following for more information: [minimum technology requirement for remote learning](#) and [resources for using D2L Brightspace](#).

## Course Learning Outcomes

Upon completion of the course, students should be able to achieve the following Learning Outcomes...

1. Describe the special strengths and weaknesses of family firms;
2. Address the behavioral, operational, and strategic issues prevalent in family firms;
3. Demonstrate analytical skills related to family firm issues and an ability to assess the governance effectiveness of family firms from the multiple perspectives of the business, ownership and family; and

4. Manage effectively and cope interpersonally within these complex and emotionally charged organizations.

## **Originality Detection**

Turnitin will be utilized in this course for all necessary assessment pieces. The following policy explains further.

### **Turnitin or another originality detection software**

Turnitin.com is an originality detection and plagiarism prevention service to which TMU subscribes. It is a tool to assist instructors in determining the similarity between students' work and the work of other students who have submitted papers to the site (at any university), internet sources, and a wide range of books, journals and other publications. While it does not contain all possible sources, it gives instructors some assurance that students' work is their own. No decisions are made by the service; it generates an "originality report," which instructors must evaluate to judge if something is original/plagiarized.

Students agree by taking this course that their written work will be subject to submission for textual similarity review to Turnitin.com. Instructors can opt to have student's papers included in the Turnitin.com database or not. Use of the Turnitin.com service is subject to the terms-of-use agreement posted on the Turnitin.com website. Students who do not want their work submitted to this plagiarism detection service must, by the end of the second week of class, consult with their instructor to make alternate arrangements.

Even when an instructor has not indicated that a plagiarism detection service will be used, or when a student has opted out of the plagiarism detection service, if the instructor has reason to suspect that an individual piece of work has been plagiarized, the instructor is permitted to submit that work in a non-identifying way to any plagiarism detection service.

**Topics and Course Schedule**

<b>Week</b>	<b>Date</b>	<b>In-Class Content</b>	<b>Text</b>	<b>Assessments</b>	<b>Group Project</b>
1	Sept 9	What Makes Family Businesses Unique Systems Theory/3 Circle Model	Ch. 1		
2	Sept 16	Strengths & Weaknesses of Family Businesses Family Business Policies	Ch. 2		Group selection due
3	Sept 23	Ownership Challenges	Ch. 3	Assignment 1 due (via D2L)	
4	Sept 30	Governance and Professionalization Overview Strategic Planning Considerations	Ch. 4 & 5		Company Section due (submit form)
5	Oct 7	Succession Process and Planning	Ch. 6 & 7		
6	Oct 14	Reading week			
7	Oct 21	Change, Adaptation and Innovation	Ch. 8	Assignment 2 due (via D2L)	Company Proposal due (via D2L)
8	Oct 28	More on Governance and the Role of the Board and Family Council	Ch. 9 & 10		
9	Nov 4	Transgenerational Entrepreneurship Estate Planning	Ch. 11 & 12		
10	Nov 11	Owners Plan Financial Measurements	Ch. 13 & 14		
11	Nov 18	Role of Non-Family Managers	Ch. 15		Written report due (via D2L)
12	Nov 25	Group Project Presentations			
13	Dec 2	Group Project Presentations			

## Evaluation

The grade for this course is composed of the mark received for each of the following components:

Method	Percent/Weight
Class/course participation	5%
Weekly Assessments (3% each)	45%
Case study Assignments (two in total/10% each)	20%
Team-based project	30%
<b>TOTAL</b>	<b>100%</b>

**Note:** Assignments are typically graded within 2 weeks of submission. Detailed instructions, including any rubrics to be used for grading, will be posted on D2L.

## Detailed Description of Evaluation

---

### Participation (5% of final grade)

Students are expected to attend and actively participate in weekly classes. The interactive classes, approximately 90 minutes, will include a lecture and interactive discussions. In the event that a class is canceled one week, students will be expected to contribute to a discussion board in lieu of class that week. During the final two weeks of class, students will be expected to provide feedback to their classmates on their group projects which will be another input to the participation grade. Simply showing up to class is not sufficient for a high participation grade. Your contributions during class – whether via verbal comments/questions, class notes, and reflective thoughts at the end of the class – all constitute engagement and will be used to determine participation grades. There may be occasions in which a poll or form is to be filled out in between classes which will constitute part of participation. More detail will be discussed during the semester.

### Weekly Assessments (45% of final grade)

Rather than a few large, heavily-weighted cumulative examinations, the same material will be tested more frequently throughout the semester (via 15 weekly short quizzes). These quizzes will be based on concepts introduced that week, corresponding to the chapters in your textbook. Each quiz is worth 3%, will be timed (10 minutes each), and completed online. Given our limited in-person time for interactive meetings, this testing is designed to ensure that

everyone is up-to-speed and has a base level of understanding as we progress through the course. The 10-minute quizzes will be made available during the week of the corresponding topic. The lowest weekly score will be dropped to calculate the weekly quiz overall grade. Please follow the announcements made in D2L for any changes to the weekly assessment schedule.

### **Case study assignments (20% of final grade)**

There will be two individual case study assignments during the semester. Completing these will involve 1) reading the case and taking notes, 2) answering a series of specific questions posed online (typically there will be 3 short answer questions per case). Please also note that surface-level, quick responses are discouraged. Rather, critical thinking, application of theory/concepts, and problem-solving abilities must be demonstrated in your response. With that said, there will be a word limit on these answers (further instructions will be provided to you on D2L), and finally 3) submitting your completed answers online via D2L.

### **Group Project (30% of final grade):**

Students will be able to choose one of two types of family businesses - either an iconic/well-known Canadian company which has extensive information available or a smaller, private company for which someone in the group has a strong personal connection and so can interview the leadership team. In groups of 5-6 people, students will document and analyze the family business operations and key issues to ultimately form recommendations. Detailed project content guidelines and grading considerations will be posted on D2L. Group case presentations will occur in the final 2 classes and are part of the final project grade.

## **University Policies**

---

Students are required to adhere to all relevant university policies found in their online course shell in D2L and/or on [the Senate website](#).

## **Department Policies**

---

### **Standards for In-Class Zoom Meetings and Other Virtual Activities**

- Students must first log into the D2L course shell using their Ryerson Matrix email ID and then join the Zoom meeting by clicking on the correct link on D2L (this should prevent

Zoom Bombing by outsiders).

- Display a professional head shot of yourself as well as your name if you are not going to keep your video on (these features are accessible from within the Zoom settings).
- Your instructor may record parts of some sessions. You will be notified on Zoom if the session is recorded.
- Mute your microphone until it is your turn to speak.
- When you are speaking, please turn your video on when possible and appropriate.
- For any side conversations please use the Chat feature. Don't assume that the professor is able to track these conversations so be prepared to raise your hand using the correct button within Zoom.
- If you need to gain the attention of the professor beyond raising your hand, please unmute your microphone and say "Question Please".
- Do not annotate others unless requested to do so.
- Follow professional conduct and be polite.
- Do not share the Zoom link with others.
- Students are not permitted to record any part of a Zoom or other virtual activity session with their professor, whether as part of a lecture or an informal meeting.
- Familiarize yourself with the tools you will need to use for remote learning. The [Continuity of Learning Guide](#) for students includes guides to completing quizzes or exams in D2L or Respondus, using D2L Brightspace, joining online meetings or lectures, and collaborating with the Google Suite.

### Standards for Written Work

- Students are expected to use an acceptable standard of business communication for all assignments, in-class discussions, and communication with the site companies and professors. This includes all email communication with the professor and other students, as well as group chats. ***Poor grammar, unprofessional and/or unacceptable standard of business communication may result in a grade of zero for that assignment. However, any student who provides a prior draft corrected by TMU Student Writing Support will not be penalized.***
- You are encouraged to obtain assistance from [Writing Support](#) for help with your written communications as needed. (See the Library for [APA style guide references](#)). ***Sloppy, poorly written, or unprofessional documents or communication may be returned with a grade of zero, no grade or unread. Please be sure to use Writing Support (and/or use Grammarly) if you need it!***



## Professionalism

Your participation in the all components of this course reflects on the professionalism and reputation of you, your group members, this course and program, and Toronto Metropolitan University. Accordingly, you are expected to conduct yourself in a professional and courteous manner at all times. For the purposes of this course, unprofessional behavior includes, but is not limited to, any of:

- Missing student and instructor meetings without giving reasonable notice and reason.
- Not participating fully in group activities in class and for assignments, which may be measured by peer evaluations or group reports submitted to instructors.
- Toronto Metropolitan University policies provide accommodation for a variety of circumstances, and seek to avoid bias of several kinds. You are expected to adhere to these policies in your group work and in interactions with students and professors. It is your responsibility to understand these policies, including religious accommodation, academic accommodation, and what constitutes bias for equity-deserving groups.

## Important Resources Available at Toronto Metropolitan University

---

- [The Library](#) provides research [workshops](#) and individual assistance. If the University is open, there is a Research Help desk on the second floor of the library, or students can use the Library's virtual research help service at <https://library.ryerson.ca/ask/> to speak with a librarian.
- [Student Life and Learning Support](#) offers group-based and individual help with writing, math, study skills, and transition support, as well as [resources and checklists to support students as online learners](#).
- You can submit an [Academic Consideration Request](#) when an extenuating circumstance has occurred that has significantly impacted your ability to fulfill an academic requirement. You may always visit the [Senate website](#) and select the blue radial button on the top right hand side entitled: Academic Consideration Request (ACR) to submit this request).

Please note that the Provost/ Vice President Academic and Dean's approved a COVID-19 statement for Fall 2022 related to academic consideration. This statement will be built into the Online Academic Consideration System and will also be on the [Senate website](#) ([www.ryerson.ca/senate](http://www.ryerson.ca/senate)) in time for the Fall term:

*Policy 167: Academic Consideration for Fall 2022 due to COVID-19: Students who miss an assessment due to cold or flu-like symptoms, or due to self-isolation, are required to provide a health certificate. All absences must follow Senate [Policy 167: Academic Consideration](#).*

Also NOTE: Policy 167: Academic Consideration does allow for a once per term academic consideration request without supporting documentation if the absence is less than 3 days in duration and is not for a final exam/final assessment. If the absence is more than 3 days in duration and/or is for a final exam/final assessment, documentation is required. For more information please see Senate [Policy 167: Academic Consideration](#).

- [TMU COVID-19 Information and Updates for Students](#) summarizes the variety of resources available to students during the pandemic.
- [TMU COVID-19 Vaccination Policy](#)
- If taking a remote course, familiarize yourself with the tools you will need to use for remote learning. The Remote Learning guide for students includes guides to completing quizzes or exams in D2L Brightspace, with or without [Respondus LockDown Browser and Monitor, using D2L Brightspace](#), joining online meetings or lectures, and collaborating with the Google Suite.
- Information on Copyright for [Faculty](#) and [students](#).

## Accessibility

---

### Academic Accommodation Support

Academic Accommodation Support (AAS) is the university's disability services office. AAS works directly with incoming and returning students looking for help with their academic accommodations. AAS works with any student who requires academic accommodation regardless of program or course load.

- [Learn more about Academic Accommodation Support](#)
- [Learn how to register with AAS](#)

Academic Accommodations (for students with disabilities) and Academic Consideration (for students faced with extenuating circumstances that can include short-term health issues) are

governed by two different university policies. Learn more about [Academic Accommodations versus Academic Consideration](#) and how to access each.

## Wellbeing Support

---

At Toronto Metropolitan University (TMU), we recognize that things can come up throughout the term that may interfere with a student's ability to succeed in their coursework. These circumstances are outside of one's control and can have a serious impact on physical and mental well-being. Seeking help can be a challenge, especially in those times of crisis.

If you are experiencing a mental health crisis, please call 911 and go to the nearest hospital emergency room. You can also access these outside resources at anytime:

- Distress Line: 24/7 line for if you are in crisis, feeling suicidal or in need of emotional support (phone: 416-408-4357)
- Good2Talk: 24/7-hour line for postsecondary students (phone: 1-866-925-5454)
- Keep.meSAFE: 24/7 access to confidential support through counsellors via My SSP app or 1-844-451-9700

If non-crisis support is needed, you can access these campus resources:

- Centre for Student Development and Counselling: 416-979-5195 or email [csdc@ryerson.ca](mailto:csdc@ryerson.ca)
- Consent Comes First – Office of Sexual Violence Support and Education: 416-919-5000 ext: 553596 or email [osvse@ryerson.ca](mailto:osvse@ryerson.ca)
- Medical Centre: call (416) 979-5070 to book an appointment

We encourage all Toronto Metropolitan University community members to access available resources to ensure support is reachable. You can find more resources available through the [Toronto Metropolitan University Mental Health and Wellbeing website](#).