

Catholic District School Board Writing Partnership

Business Studies

Course Profile

Organizational Studies: Organizational Behaviour and Human Resources

Grade 12

University/College Preparation

BOH4M

- *for teachers by teachers*

This sample course of study was prepared for teachers to use in meeting local classroom needs, as appropriate. This is not a mandated approach to the teaching of the course. It may be used in its entirety, in part, or adapted.

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Acknowledgments

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Course Overview

Organizational Studies: Organizational Behaviour and Human Resources, BOH4M, Grade 12, University/College Preparation

Policy Document: *The Ontario Curriculum, Grades 11 and 12, Business Studies, 2000.*

Prerequisite: Any University, University/College, or College Preparation course in Business Studies or Canadian and World Studies

Course Description

This course focuses on ways in which organizations deal with issues affecting their competitiveness in a changing technological and global business environment. Students analyse various leadership techniques and study various issues such as ethics in business, social responsibility, management of group dynamics, uses of information technology, workplace stress and conflict, motivation of employees, and globalization. Students also investigate the management of a diverse workforce within an organization, and the importance of strategic planning.

How This Course Supports the Ontario Catholic School Graduate Expectations

Catholic students must recognize that all businesses can attain prosperity within the precepts of our faith. In light of globalization and the rapid changes taking place in the workplace, both management and employees must collaborate to proactively evaluate the pressing situations that present themselves each day. Dynamic companies are characterized by excellent leadership and focus. Visionary leadership requires both a long-range view of opportunities and short range plans to promote strategic growth. Consequently, students examine how change demands proper planning, which in turn facilitates the achievement of individual and company goals. Teachers delivering this course are to emphasize that highly competitive companies embrace change despite resistance. Management must be the agent of change, especially when new ideas can lead to the advancement of the common good. It is essential that students realize that a leader must be able to articulate why new leadership practices require risk and insight. Jesus brought more change and profound newness to life than anyone else in the history of the world. As a result, He was challenged at every turn. However, Jesus met each challenge with well thought-out and articulated responses – “Let him who is without sin among you be the first to throw a stone.” (John 8:7)

Course Notes

This course serves as preparation for university or college programs. With this in mind, the course should foster theoretical and analytical thinking. Students should be given ample opportunity to demonstrate these aptitudes.

The primary focus of this course revolves around the major functions of management: strategic planning, organizational design, motivation and leadership, and evaluation.

Students should be exposed to a variety of postsecondary teaching methods. Specifically, they should complete a number of case studies utilizing formats that are consistent with college and university models. Students should participate in some form of computer simulation that has them make decisions based on a number of variables and includes the analysis of internal and external business data. In addition, students should make connections to the real world through company tours, short-term job shadowing experiences, and exposure to various guest speakers throughout the course.

This course enables students to apply theoretical concepts by embracing the essence of each unit in their final culminating project (Collective Bargaining Project). This activity allows students to consider elements such as strategic management, staffing, performance appraisals, technological trends, and social responsibility during the negotiation of their collective bargaining agreements.

The culminating project should be assigned after the Human Resource Organization unit. The first three units provide a substantial foundation for the students to effectively address the requirements of the Collective Bargaining Agreement Project.

Teachers are reminded that the final exam should be a relevant and considerable component of the assessment and evaluation process. Students taking this course are being prepared to attend postsecondary institutions where final exams may account for a significant portion of their final mark in some courses.

The Business Studies document clusters learning expectations in a cohesive fashion. Some specific expectations from other strands have been added to each unit. These additions do not alter the focus, but simply increase the depth of the concepts to be covered.

Units: Titles and Time

Unit 1	Issues Facing Organizations	15 hours
Unit 2	Planning	20 hours
* Unit 3	Human Resource Organization	25 hours
Unit 4	Organizational Leadership	25 hours
Unit 5	Motivation and Evaluation	25 hours

* This unit is fully developed in this Course Profile.

An extra five hours has been added to Unit 4 and 5 to allow for the execution of the Culminating Activity.

Unit Overviews

Unit 1: Issues Facing Organizations

Time: 15 hours

Unit Description

Students examine management trends that are revolutionizing the nature of business. They study the globalization of business by examining different customs, practices, and cultures in a business context. Students realize that management is an agent of change. Furthermore, they understand the importance of a manager's role in creating an ethical and socially responsible workplace environment.

Unit Overview Chart

Cluster	Learning Expectations	Assessment Categories	Focus
1	ISV.01, IS1.01, IS1.02, IS1.03, IS1.04, IS1.05, IS2.04, IS4.01 CGE1d, h, i, 3b, c, d, f, 4c, e, g, 5a, e, 7a, b, f, g, j	Knowledge/Understanding Thinking/Inquiry	Trends in Management Theory
2	ISV.02, IS1.03, IS2.01, IS2.02, IS2.03, IS2.04, OL1.03 CGE1h, 2e, 3b, d, 4d, e, g, 5a, b, 7b, f, h, i, j	Knowledge/Understanding Thinking/Inquiry Application Communication	Management as an Agent of Change

Cluster	Learning Expectations	Assessment Categories	Focus
3	ISV.03, IS3.01, IS3.02, IS3.03, IS4.03, HR3.01, OL5.01 CGE1d, h, 3b, d, 4g, 5e, 6a, 7a, b, f, h, i, j	Knowledge/Understanding Application Thinking/Inquiry Communication	Ethics and Social Responsibility
4	ISV.04, IS4.01, IS4.02, IS4.03, IS3.03, OL1.01, OL4.01 CGE1e, h, 2d, 3f, 5e, 7a, f, g, h, i, j	Knowledge/Understanding Thinking/Inquiry	The Global Perspective
5	ISV.05, IS5.01, IS5.02, IS5.03, HR1.03, OL4.04 CGE2b, c, d, e, 4c, e, 5c, d, g, h, 7b, h, j	Knowledge/Understanding Application Communication	Career Opportunities

Unit 2: Planning

Time: 20 hours

Unit Description

Students investigate how decision making, problem solving, and an environment that fosters creative thinking all relate to effective management practices. They recognize the need for participatory short- and long-term planning policies. Moreover, students understand the essence of the strategic planning process and the relationship between objectives and strategies at each level of the hierarchy of authority within an organization.

Unit Overview Chart

Cluster	Learning Expectations	Assessment Categories	Focus
1	OPV.01, OP1.01, OP1.02, OP1.03, OP1.04, OP3.01, OL2.03 CGE2e, 3c, d, 4e, 5b, 7j	Knowledge/Understanding Thinking/Inquiry Application Communication	The Planning Process
2	OPV.02, OP2.01, OP2.02, OP2.03, ME1.01, OL3.04 CGE2a, e, 3b, c, d, 4d, e, 5b, f, 7b, j	Knowledge/Understanding Thinking/Inquiry Application Communication	Planning Strategies
3	OPV.03, OP3.01, OP3.02, OP3.03, OP3.04, OP1.01, OP1.02 CGE2a, e, 3b, c, d, 4d, e, 5b, f, 7b, j	Knowledge/Understanding Thinking/Inquiry Application Communication	Strategic Planning

Unit 3: Human Resource Organization

Time: 25 hours

Unit Description

Students explore a variety of organizational structures. Specifically, they explain how organizational design trends and the changing role of management are modernizing the traditional structures evident in organizations today. Students recognize that management must respect the rights, responsibilities, and contributions of its employees. Through this exploration, students become conscious of how an organization can effectively address its staffing issues.

Unit Overview Chart

Cluster	Learning Expectations	Assessment Categories	Focus
1	HRV.01, HRV.02, HR1.01, HR1.02, HR1.03, HR1.04, HR2.03, IS5.01 CGE2e, 3c, 4d, 5a, g, h, 6c, 7b, f, h, i, j	Knowledge/Understanding Application Thinking/Inquiry Communication	Organizational Structures
2	HRV.02, HR2.01, HR2.02, HR2.03 CGE1h, 3b, c, d, f, 4b, d, e, g, 5a, c, d, e, g, h, 7b, f, h, j	Knowledge/Understanding Application Thinking/Inquiry	The Changing Nature of Work
3	HRV.03, HR3.01, HR3.02, HR3.03, IS2.03 CGE1h, 2e, 3d, 4e, g, 5e, g, h, 7f, h, j	Knowledge/Understanding Application Thinking/Inquiry Communication	Staffing

Unit 4: Organizational Leadership

Time: 25 hours

Unit Description

Students examine how elements of human personality impact human behaviour. Specifically, they explore effective leadership strategies and how various leadership styles apply to different settings. Students assess the importance of effective communication skills in a globally competitive environment. In addition, they examine the role that stress and conflict play in an organization.

Unit Overview Chart

Cluster	Learning Expectations	Assessment	Focus
1	OLV.01, OL1.01, OL1.02, OL1.03, IS4.03 CGE1h, 2e, 3c, 5c, 6c, 7b, f, h, j	Knowledge/Understanding Thinking/Inquiry Application Communication	Human Behaviour
2	OLV.02, OL2.01, OL2.02, OL2.03, OL3.01, OP1.04, HR2.03 CGE3b, f, 4a, e, 5a, e, f, 7b, h, j	Knowledge/Understanding Thinking/Inquiry Application Communication	Group Dynamics
3	OLV.03, OL3.01, OL3.02, OL3.03, OL3.04, OL2.03, OL5.03, OP2.03, ME1.01 CGE1h, 2a, 3b, c, f, 4e, 5a, c, e, f, 7a, b, c, h, j	Knowledge/Understanding Thinking/Inquiry Application Communication	Leadership Techniques
4	OLV.04, OL4.01, OL4.02, OL4.04, IS4.03 CGE1h, 2a, b, c, d, e, 3c, 5h, 7f	Knowledge/Understanding Application Communication	Communication Techniques
5	OLV.05, OL5.01, OL5.02, OL5.03, OL1.03, ME3.03 CGE2a, e, 3b, c, 4a, b, 5a, d, e, 7a, b, c, f, h, i	Knowledge/Understanding Thinking/Inquiry Communication Application	Stress and Conflict Resolution

Unit 5: Motivation and Evaluation

Time: 25 hours

Unit Description

Students examine the correlation between effective motivational strategies and an individual's needs. They realize the role that management plays in creating a work environment that is nurturing, dignified, and meaningful. Moreover, students explore the use of various compensation, benefit, discipline, and performance appraisal systems that improve job satisfaction and meet the objectives of the organization.

Unit Overview Chart

Cluster	Learning Expectations	Assessment Categories	Focus
1	MEV.01, ME1.01, ME1.02, ME1.03, ME3.01, OP2.03 CGE2e, 4e, 5a, h, 7b, h	Knowledge/ Understanding	Evaluation of Individual and Team Performance
2	MEV.02, ME2.01, ME2.02, ME2.03, ME1.02, HR3.01 CGE2e, 3c, 4c, e, 5a, d, g, h, 7b, h	Knowledge/ Understanding Application Thinking/Inquiry	Performance Appraisal
3	MEV.03, OLV.01, OLV.02, ME3.01, ME3.02, ME3.03, ME3.04, ME1.01, ME1.02, OL1.01, OL1.02, OL1.03, OL2.01, OL2.02, OL2.03 CGE1h, 2e, 3c, d, 4e, 5a, c, d, e, f, g, h, 7b, f, h	Knowledge/ Understanding Thinking/Inquiry	Motivation Theories and Strategies

Teaching/Learning Strategies

Due to the diverse student learning styles, it is imperative that the teacher use a wide variety of teaching strategies. These strategies fall into three different categories: teacher-centred, learner-centred, and self-directed. Teachers should use the Curriculum Planner for more specific and detailed teaching/learning strategies.

Teacher-Centred Strategies

Teacher-centred strategies are those in which the teacher directs the learning. Teacher-centred strategies have a definite place in this course as students learn to handle a broad range of topics. Teachers may find these strategies useful as ways to model how to set up notebooks or databases, to present complex concepts, or to make the best use of time in some parts of the course. Suggested strategies include: teacher-led review, work/task sheet, board work, note-taking, Socratic, video, overhead, and mnemonic devices (trigger recall).

Student-Centred Strategies

Students and group-centred strategies, which are activity based, provide students with opportunities to actively apply what they have learned. Through the use of these teaching strategies, it is expected that students develop problem-solving and collaborative skills. In addition, some of the strategies allow students the opportunity to build their self-reliance and independence skills through their commitment to meeting individual and team goals. Suggested student strategies include: text referencing, note making, collaborative technologies, demonstration, audio/visual, visual organizers, group discussion, computer lab work, field trip.

Group-Centred Strategies

Suggested group-centred strategies include: group project, peer helping, role playing, guest speaker, sharing, displays, electronic media research, computer-assisted learning, questionnaires, jigsaw.

Assessment & Evaluation of Student Achievement

Teachers should employ a variety of assessment strategies frequently throughout the course to communicate the expectations of the course to students, make appropriate adjustments to teaching/learning strategies as required, and accommodate the special needs of students. Student input to the assessment process should be welcomed and valued.

Diagnostic	Formative	Summative
<ul style="list-style-type: none"> • Brainstorming • Word Clustering 	<ul style="list-style-type: none"> • Interviews • Verbal Feedback • Written Feedback • Graphic Organizers • Presentations • Role Play 	<ul style="list-style-type: none"> • Assignments • Quizzes • Tests • Rubrics • Models

Evaluation

Seventy per cent of the grade will be based on assessments and evaluations conducted throughout the course. Thirty per cent of the grade will be based on a final evaluation in the form of an examination, performance, essay, and/or other methods of evaluation. It is suggested that the Collective Bargaining Culminating Project Appendix 3.3.4 be part or all of the final examination.

Accommodations

The teacher should consult individual student IEPs for specific direction on accommodation for individuals. The following are some suggested strategies based on different exceptionalities that could be applied throughout the various activities:

<p>Reading</p> <ul style="list-style-type: none"> • Read questions first • Modify reading requirements • Use reading partners • Pre-teach concepts and vocabulary • Highlight notes • Use visuals • Use videos • Read out instructions 	<p>Mathematics</p> <ul style="list-style-type: none"> • Check work after each example • Relate problems to real life • Modify complexity of examples • Provide daily review • Teach use of diagrams • Teach use of calculator • Use hands-on manipulatives • Adjust the number of problems
<p>Memory</p> <ul style="list-style-type: none"> • Teach students to verbalize concepts • Check that daily assignments are recorded in students' planners • Teach strategies to enable recall • Insist that students write things down • Provide lists and/or flow charts • Give visual clues • Give demonstrations • Teach mnemonics 	<p>Oral Language</p> <ul style="list-style-type: none"> • Provide non-threatening environment • Do not ask students to respond to questions without forewarning them • Use cooperative learning • Work one-to-one with students • Have realistic expectations • Provide choices • Use electronic media • Permit small groups

<p>Motivation</p> <ul style="list-style-type: none"> • Provide a variety of types of assignments • Create personalized assignments • Set realistic goals and expectations • Avoid public confrontations • Provide praise and positive feedback • Be flexible with timelines • Conference on a one-to-one basis • Maintain contact with home 	<p>Written Language</p> <ul style="list-style-type: none"> • Vary assignments • Give explicit instructions • Allow more time for activity/assignment completion • Provide photocopied notes • Allow point-form notes • Provide assistance in correcting language conventions • Use peer editing • Teach use of spell check software
<p>Attention</p> <ul style="list-style-type: none"> • Provide a variety of activities and teaching techniques • Give blocks of information and vary the activities frequently • Use cooperative learning • Ask students to repeat teachers instructions • Provide immediate feedback • Move around room • Use visuals • Ensure that students can see an end in sight 	<p>ESL</p> <ul style="list-style-type: none"> • Pair or group students with fluent English speakers • Provide note-making guide • Promote peer tutoring • Encourage use of first-language English dictionaries for assignments and assessment • Pair written instructions with verbal instructions. Provide visual and auditory clues • Allow extra time for reading or writing assignments
<p>Gifted</p> <p>Opportunities for extended learning include:</p> <ul style="list-style-type: none"> • independent study; • e-commerce simulation; • Junior Achievement Rotary Club Business Camp Enterprise; • Sir Wilfrid Laurier Stock Market Competition; • The Association of Marketing Students (DECA); • Ontario Business Educators Association (OBEA) contests; <p>Business Club/School Store; mentorship programs.</p>	

Resources

There is a wide number of general business resources available. The list below is intended to assist both the student and teacher but is not definitive. Resources required for specific unit activities are provided but are presented in generic subcategories to encourage the teacher and students to creatively pursue additional resources where appropriate. Internet sites are not segregated into a list of their own but included in each subcategory. Every effort has been made to check the accuracy of Internet sites, but teachers are advised to check addresses prior to use as they change from time to time. Very brief annotated descriptions are included for some resources but teachers should check all of the information to determine which references are most appropriate for their students.

Units in this Course Profile make reference to the use of specific texts, magazines, films, videos, and websites. Teachers need to consult their board policies regarding use of any copyrighted materials. Before reproducing materials for student use from printed publications, teachers need to ensure that their board has a Cancopy licence and that this licence covers the resources they wish to use. Before screening videos/films with their students, teachers need to ensure that their board/school has obtained the

appropriate public performance videocassette licence from an authorized distributor, e.g., Audio Cine Films Inc. Teachers are reminded that much of the material on the Internet is protected by copyright. The copyright is usually owned by the person or organization that created the work. Reproduction of any work or substantial part of any work on the Internet is not allowed without the permission of the owner.

Theology

Canadian Conference of Catholic Bishops (CCCCB) – <http://www.cccb.ca>

Kosior, Stan, Peter Petrasek, Colleen Smyth, Bernard Smyth, and Larry Trafford. *One World to Share: When Faith and Economics Meet*. Toronto, Ontario: Metropolitan Separate School Board (TCDSB), 1990.

Pope John Paul II. *On Human Work*. Encyclical Letter, 1981.

– <http://www.catholic.net/RCC/documents/>

Pope John Paul II. *On the Hundredth Anniversary of Rerum Novarum*. Encyclical Letter, 1991.

– <http://www.catholic.net/RCC/documents/>

Pope Leo XIII. *On the Condition of the Working Classes*. Encyclical Letter, 1891.

– <http://www.catholic.net/RCC/documents/>

The above references can be used for all units in this course.

Associations

Canadian Bankers Association – <http://www.cba.ca>

Canadian Council of Human Resource Associations – <http://www.chrpanada.com>

Canadian Foundation for Economic Education – <http://www.cfee.org/en>

Canadian Management Association – <http://www.cma-canada.org>

Canadian Youth Business Foundation – <http://www.cybf.ca>

The Canadian Chamber of Commerce – <http://www.chamber.ca>

The Conference Board of Canada – <http://www.conferenceboard.ca>

The Ontario Chamber of Commerce – <http://www.occ.on.ca>

Investment Funds Institute of Canada – <http://www.ific.ca>

Investor Learning Centre of Canada – <http://www.investorlearning.ca>

The above association references can be used for all units in this course.

Print

Axtell, Roger E. *Gestures: The DO'S and TABOOS of Body Language Around the World*. Toronto, Ontario: John Wiley and Sons Inc., 1998. **Unit 1**

Axtell, Roger E. *The DO'S and TABOOS of International Trade: A Small Business Primer*. Toronto, Ontario: John Wiley & Sons, 1994. **Unit 1, Unit 2, Unit 4**

Beckhard, Richard, F. Hesselbein, and M. Goldsmith, eds. *The Organization of the Future*. San Francisco, California: Jossey-Bass Publishers, 1997. **Unit 1, Unit 2, Unit 3, Unit 5**

Brand, Margaret and Ann Sparks. *Success in the Workplace*. Mississauga, Ontario: Copp Clark Pitman Ltd., 1990. **Unit 1, Unit 3, Unit 4, Unit 5**

Bazerman, M. *Judgement in Managerial Decision Making*. Toronto, Ontario: John Wiley and Sons Canada Limited, 2001. ISBN 0-471-39887 **Unit 2, Unit 3, Unit 4, Unit 5**

Briner, Bob and Ray Pritchard. *The Leadership Lessons of Jesus*. Nashville, Tennessee: Broadmand and Holman, 1997. ISBN 0805463569 **Unit 4, Unit 5**

Cook, Curtis. *Management & Organizational Behavior with PowerWeb*. Toronto, Ontario: McGraw-Hill Ryerson, 2001. ISBN 0072508337 **Unit 1, Unit 3, Unit 4, Unit 5**

Covey, Stephen R. *The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change*. New York, New York: Simon and Schuster, 1990. ISBN 0671708635 **Unit 4, Unit 5**

Covey, Stephen R., A. R. Merrill, and R. R. Merrill. *First Things First*. New York, New York: Simon and Schuster, 1994. ISBN 0684802031 **Unit 1, Unit 2, Unit 4, Unit 5**

Covey, Stephen R. *Principle-Centered Leadership*. New York, New York: Simon and Shuster, 1991. ISBN 0671792806 **Unit 4**

Di Norcia, Vincent. *Hard Like Water: Ethics in Business*. Toronto, Ontario: Oxford University Press, 1998. **Unit 1, Unit 4, Unit 5**

Doherty, Dennis C. *Making Economic Choices*. Toronto, Ontario: Copp Clark Pitman, 1992.

Unit 2, Unit 3

Hartley, R. *Management Mistakes and Successes*. Toronto, Ontario: John Wiley and Sons Canada Limited, 2000. ISBN 04713706 **This reference can be used for all units.**

Ivancevich, John. *Organizational Behavior and Management*. Toronto, Ontario: McGraw-Hill Ryerson, 2002. ISBN 0072436387 **Unit 3, Unit 4, Unit 5**

Ivancevich, John. *Human Resource Management*. Toronto, Ontario: McGraw-Hill Ryerson, 2001. ISBN 0072312688 **Unit 3, Unit 5**

McLean, J.W., and William Weitzel. *Leadership: Magic, Myth, or Method?* New York, New York: American Management Association AMACOM, 1992. **Unit 4**

McShane, Steven. *Canadian Organizational Behaviour*. Toronto, Ontario: McGraw-Hill Ryerson, 2001. ISBN 0070871809 **Unit 3, Unit 4, Unit 5**

Nickels, Willian G., J. M. McHugh, S. M. McHugh, and P. D. Berman. *Understanding Canadian Business*. Toronto, Ontario: McGraw-Hill Ryerson Limited, 1997. ISBN 0256194440.

This reference can be used for all units.

Popcorn, Faith and Lys Marigold. *Clicking 16 Trends to Future Fit Your Life, Your Work and Your Business*. New York, New York: Harper Collins, 1996. **Unit 1, Unit 2, Unit 3**

Popcorn, Faith and Lys Marigold. *Clicking: 17 Trends that Drive Your Business and Your Life*. New York, New York: Harper Collins, 1997. **Unit 1, Unit 2**

Popcorn, Faith. *The Popcorn Report*. New York, NY: Doubleday, 1991. **Unit 1, Unit 2, Unit 3**

Ritti, R. *The Ropes to Skip and The Ropes to Know Studies in Organizational Behaviour*. Toronto, Ontario: John Wiley and Sons Canada Limited, 1997. ISBN 0471133043 **Unit 3, Unit 4, Unit 5**

Schermerhorn, John R. *Management – 6th Ed*. New York, New York: John Wiley and Sons, Inc., 2001. ISBN 047138755X **This reference can be used for all units.**

Schermerhorn, J.R., R.J. Cattaneo, and A. Templer. *Management: The Competitive Advantage*. Toronto, Ontario: John Wiley and Sons Canada Limited, 1995. ISBN 0471641103

This reference can be used for all units.

Schwind, Herman. *Canadian Human Resource Management*. Toronto, Ontario: McGraw-Hill Ryerson, 2001. ISBN 0070887357 **Unit 3, Unit 4, Unit 5**

Trevino, J. *Nelson Managing Business Ethics*. Toronto, Ontario: John Wiley and Sons Canada Limited, 1999. ISBN 0471246522 **Unit 1, Unit 5**

Wren, D. *Evolution of Management Thought*. Toronto, Ontario: John Wiley and Sons Canada Limited, 1993. ISBN 047159752X **This reference can be used for all units.**

Corporations

All corporate web sites can be located via www.tse.com.

The above corporation reference can be used for all units in this course.

Government

Human Resources Development Canada – <http://www.toronto-hrhc.sto.org> **Unit 3, Unit 4, Unit 5**

Industry Canada – <http://strategis.ic.gc.ca/> **This reference can be used for all units.**

Revenue Canada – <http://www.rc.gc.ca> **Unit 1, Unit 2, Unit 3**

Statistics Canada – <http://www.statcan.ca/> **This reference can be used for all units.**

Youth Resource Network of Canada – <http://www.youth.gc.ca/>

This reference can be used for all units.

Canada Business Services – <http://www.cbcs.org/> **This reference can be used for all units.**

Ontario Ministry of Economic Development and Trade – <http://www.ontario-canada.com>

Business Development Bank – <http://www.bdc.ca> **Unit 1, Unit 2, Unit 3**

Team Canada Inc. – <http://www.exportsource.gc.ca> **Unit 1, Unit 2**

Computer Simulation

“Aftermarket II Canadian Business Simulation”, Canadian Education Bureau, 1803 Folkway Drive, Mississauga, Ontario, L5L 2X1, (905) 820-8369 **This reference can be used for all units.**

Online Magazines

Canadian Business Magazine – <http://www.canadianbusiness.com> **This reference can be used for all units.**

E-Business Magazine – <http://www.ebusiness.uk.com> **This reference can be used for all units.**

The Economist – <http://www.economist.com> **This reference can be used for all units.**

Entrepreneur Magazine – <http://www.entrepreneurmag.com> **This reference can be used for all units.**

Fast Company Magazine – <http://www.fastcompany.com> **This reference can be used for all units.**

Forbes – <http://www.forbes.com> **This reference can be used for all units.**

Fortune Magazine – <http://www.fortune.com> **This reference can be used for all units.**

Inc. Magazine – <http://www.inc.com> **This reference can be used for all units.**

Macleans’s Magazine – <http://www.macleans.ca> **This reference can be used for all units.**

Marketing Magazine – <http://www.marketingmag.ca> **Unit 1, Unit 3**

Profit Magazine – <http://www.profitguide.com> **This reference can be used for all units.**

Strategy Magazine – <http://www.strategymag.com> **Unit 2, Unit 3**

Online Newspapers

All online newspaper websites can be located via – <http://www.thepaperboy.com>

The above reference can be used for all units in this course.

Stock Market, Currency Exchange Web Sites

Toronto Stock Exchange – <http://www.tse.com>

Australian Stock Exchange – <http://www.asx.com.au/>

Frankfurt Stock Exchange – <http://deutsche-boerse.com/index.html>

Hong Kong Exchange – <http://www.sehk.com.hk/>

FTSE – <http://www.ftse.com/>

NASDAQ – <http://www.nasdaq.com/>

New York Stock Exchange – <http://www.nyse.com/>

Tokyo Stock Exchange – <http://www.tse.or.jp/eindex.html>

The above website references can be used for all units in this course.

Non-print material

A&E Television Networks, “Sam Walton.” New York: New Video Group, 1997. 50 min. **Unit 3**

OSS Considerations

This course may be counted as an optional credit or in additional compulsory credit for diploma purposes.

Coded Expectations, Organizational Studies: Organizational Behaviour and Human Resources, Grade 12, University/College Preparation, BOH4M

Issues Facing Organizations

Overall Expectations

- ISV.01** · evaluate the significance of new trends in management theory;
- ISV.02** · analyse how companies respond to internal and external pressures for change;
- ISV.03** · evaluate the impact on organizations of issues related to ethics and social responsibility;
- ISV.04** · analyse North American organizational concepts from a global perspective;
- ISV.05** · assess the role of a manager within the structure of an organization and the variety of career opportunities available.

Specific Expectations

Trends in Management Theory

- IS1.01** – analyse the importance of major factors (e.g., social, economic, political, technological) that influence changes in management theory;
- IS1.02** – describe major management theories and practices (e.g., scientific, administrative, behavioural) from past decades and compare them to current management theories and practices;
- IS1.03** – evaluate the importance of recent management theories (e.g., systems theory, the organic organization concept) that have had an impact on North American organizations;
- IS1.04** – analyse management concepts found in current business literature;
- IS1.05** – demonstrate the use of proper business vocabulary.

The Management of Change

- IS2.01** – analyse the elements that bring about change in an organization (e.g., developments in information technology, stages in the company life cycle, aspects of the organizational culture);
- IS2.02** – analyse the reasons for various attitudes towards change (e.g., why individuals fear change, why individuals embrace change);
- IS2.03** – analyse major challenges facing today’s organizations (e.g., new technologies, the influence of the Internet, globalization, employment-equity legislation) with reference to specific organizations;
- IS2.04** – evaluate various management strategies used to implement change within an organization (e.g., participatory management, communication, training).

Issues of Ethics and Social Responsibility

- IS3.01** – evaluate the impact on management strategies and decision making of major ethical dilemmas (e.g., at the level of the individual, the workplace, and the local and global community);
- IS3.02** – analyse the nature and importance of corporate social responsibility;
- IS3.03** – analyse organizational codes of ethics to identify expected behaviours for an organization (e.g., in relation to workforce diversity, conflicts of interest, customer/supplier relationships, confidentiality of information).

The Global Context

- IS4.01** – compare Canada’s economic and social practices with those of its worldwide trading partners;
- IS4.02** – describe the structures and significance of multinational corporations;
- IS4.03** – compare Canadian business etiquette with that of other countries (e.g., customs or protocol related to greetings, language translations, gift-giving, business card exchanges, gender roles, communication).

Career Opportunities

IS5.01 – identify and describe management roles and the different levels of management;

IS5.02 – summarize managerial responsibilities, activities, skills, and competencies as they apply to different levels of management;

IS5.03 – investigate, using electronic tools, a variety of current management opportunities and the education and training they require.

Organizational Leadership

Overall Expectations

OLV.01 · apply theories of human behaviour to understand how individuals and groups function in the workplace;

OLV.02 · apply teamwork and group dynamics to carry out projects and solve problems;

OLV.03 · demonstrate the use of proper leadership techniques in a variety of situations;

OLV.04 · demonstrate the use of appropriate communication techniques related to business management;

OLV.05 · evaluate the strategies used by individuals and organizations to manage stress and conflict.

Specific Expectations

Human Behaviour

OL1.01 – analyse the components of human personality (e.g., heredity, culture, family) and their impact on human behaviour;

OL1.02 – demonstrate an understanding of the relationship between a person’s biases and the decisions he or she makes;

OL1.03 – explain the relationship between three major influences on human behaviour (personality, attitudes, and perception) and job satisfaction.

Group Dynamics

OL2.01 – demonstrate an understanding of the roles individuals assume within a group structure and of the stages of group development;

OL2.02 – explain the nature and types of groups within an organization (e.g., formal/informal, committees/departments, electronic work groups);

OL2.03 – analyse the factors that contribute to the success or failure of a team (e.g., shared norms, cohesiveness).

Leadership Techniques

OL3.01 – analyse the factors that contribute to effective leadership (e.g., vision, power, personality traits, behaviour);

OL3.02 – differentiate between a leader and a manager (e.g., personality traits, behaviour, roles);

OL3.03 – compare a variety of leadership styles (e.g., task-oriented and relationship-oriented, authoritative and consultative, transformational);

OL3.04 – analyse the relationship between leadership styles and the settings in which they are applied.

Communication Techniques

OL4.01 – demonstrate an understanding of the key elements of the communication process and the barriers to effective communication (e.g., semantics, cultural differences);

OL4.02 – demonstrate the effective use of business communication documents (e.g., business reports, correspondence);

OL4.03 – demonstrate appropriate presentation techniques for both groups and individuals;

OL4.04 – demonstrate the effective use of information technology (e.g., word processing software, e-mail, teleconferencing, electronic research tools) to attain organizational goals.

Stress and Conflict

OL5.01 – evaluate the impact on performance of personal and work-related stress;

OL5.02 – demonstrate an understanding of organizational factors that affect stress in the workplace (e.g., organizational conditions, negotiation and intervention techniques);

OL5.03 – evaluate individual conflict-management styles and their impact on a situation (e.g., avoidance, accommodation, compromise).

Organizational Planning

Overall Expectations

OPV.01 · analyse the importance of proper planning, applied creativity, and effective problem solving and decision making in addressing an organization's human resource issues;

OPV.02 · apply appropriate planning theories and strategies to a variety of situations;

OPV.03 · analyse the relationship between strategic planning and the success of an organization.

Specific Expectations

The Planning Process

OP1.01 – describe the role of the planning process in the successful completion of tasks;

OP1.02 – demonstrate an understanding of the relationship between planning and decision making;

OP1.03 – evaluate different problem-solving strategies as they relate to a variety of managerial problems;

OP1.04 – analyse the importance of individual and group creativity in problem-solving approaches.

Planning Strategies

OP2.01 – demonstrate the use of short-term planning tools and strategies (e.g., policies, operational plans, planning approaches);

OP2.02 – demonstrate an understanding of the need for long-term planning strategies (e.g., use of budgets, statistics, simulations, forecasts);

OP2.03 – demonstrate an understanding of the importance of leadership in the planning process (e.g., to promote participatory planning, set benchmarks, facilitate communication).

Strategic Planning

OP3.01 – describe the essentials of strategic planning and strategic management;

OP3.02 – explain the relationship between an organization's official objectives and its operating objectives;

OP3.03 – demonstrate an understanding of measures that contribute to successful strategic planning (e.g., setting objectives, facilitating communication, foreseeing and avoiding pitfalls);

OP3.04 – compare various strategic planning processes that have resulted in successful organizations.

Human Resource Organization

Overall Expectations

HRV.01 · demonstrate an understanding of the various organizational structures used to manage the workforce effectively;

HRV.02 · identify and describe the ways in which organizational structures have changed to adapt to the changing nature of work;

HRV.03 · demonstrate an understanding of staffing issues.

Specific Expectations

Organizational Structures

- HR1.01** – demonstrate an understanding of traditional organizational structures (e.g., functional, divisional, hybrid);
- HR1.02** – assess current organizational structures in terms of the ways in which they increase productivity and competitive advantage;
- HR1.03** – explain the managerial role in dealing with organizational trends in the modern marketplace (e.g., trends such as shorter chain of command, wider span of control, more delegation, empowerment);
- HR1.04** – demonstrate an understanding of how organizational design (e.g., communication channels, team structures, alternative work schedules) can support a positive corporate culture.

The Changing Nature of Work

- HR2.01** – assess the relationship between the individual and an organization, considering issues such as the meaning of work, the psychological contract, the quality of work life, and job satisfaction;
- HR2.02** – compare alternative job-design approaches (e.g., rotation, simplification, enrichment, enlargement);
- HR2.03** – compare the strengths and weaknesses of various work settings and arrangements for individuals and groups (e.g., job sharing, self-managed teams, work schedules, working off-site, contract work).

Staffing Issues

- HR3.01** – identify and describe the impact and importance of legal considerations in the staffing process, including issues such as wages, employment equity, health and safety, and employee rights;
- HR3.02** – analyse the relationship between an organization’s objectives and the human-resource process (e.g., planning, recruitment, selection);
- HR3.03** – explain the strategies and concepts involved in developing a quality work force (e.g., orientation, training, career development).

Motivation and Evaluation

Overall Expectations

- MEV.01** · identify and describe the importance of evaluation in the successful management of both individual and team performance;
- MEV.02** · analyse a variety of performance-appraisal techniques as they apply to a variety of situations;
- MEV.03** · compare a variety of theories about how to motivate individuals and teams in a productive work environment.

Specific Expectations

Evaluation of Individual and Team Performance

- ME1.01** – demonstrate an understanding of how evaluation techniques relate to the managerial processes of leading, planning, and organizing;
- ME1.02** – identify the factors affecting individual and group performance (e.g., individual needs, organizational support, motivation);
- ME1.03** – explain the strategies used by managers to control human resources (e.g., types of controls, objectives of controls).

Performance Appraisal

ME2.01 – explain the nature and importance of performance appraisal within an organization;

ME2.02 – compare major performance-appraisal methods and techniques (e.g., scales, comparisons);

ME2.03 – demonstrate an understanding of compensation systems, benefit systems, and discipline systems and their relationship to high-performance activities and increased job satisfaction.

Motivation Theories and Strategies

ME3.01 – explain the relationships between motivation, rewards, and job performance;

ME3.02 – demonstrate an understanding of individual needs as identified by various theories of motivation (e.g., the theories of Maslow, Herzberg, Alderfer);

ME3.03 – evaluate various theories of motivation in terms of their views on productivity and performance;

ME3.04 – analyse the various motivational strategies used by particular organizations.

Ontario Catholic School Graduate Expectations

The graduate is expected to be:

A Discerning Believer Formed in the Catholic Faith Community who

- CGE1a** -illustrates a basic understanding of the **saving story** of our Christian faith;
- CGE1b** -participates in the **sacramental life** of the church and demonstrates an understanding of the centrality of the Eucharist to our Catholic story;
- CGE1c** -actively reflects on **God’s Word** as communicated through the Hebrew and Christian scriptures;
- CGE1d** -develops attitudes and values founded on Catholic **social teaching** and acts to promote social responsibility, human solidarity and the common good;
- CGE1e** -speaks the **language of life**... “recognizing that life is an unearned gift and that a person entrusted with life does not own it but that one is called to protect and cherish it.” (Witnesses to Faith)
- CGE1f** -seeks intimacy with God and celebrates **communion** with God, others and creation through prayer and worship;
- CGE1g** -understands that one’s purpose or **call in life** comes from God and strives to discern and live out this call throughout life’s journey;
- CGE1h** -respects the **faith traditions**, world religions and the life-journeys of **all people of good will**;
- CGE1i** -integrates faith with life;
- CGE1j** -recognizes that “sin, human weakness, conflict and forgiveness are part of the human journey” and that the cross, the ultimate sign of forgiveness is at the heart of **redemption**. (Witnesses to Faith)

An Effective Communicator who

- CGE2a** -listens actively and critically to understand and learn in light of gospel values;
- CGE2b** -reads, understands and uses written materials effectively;
- CGE2c** -presents information and ideas clearly and honestly and with sensitivity to others;
- CGE2d** -writes and speaks fluently one or both of Canada’s official languages;
- CGE2e** -uses and integrates the Catholic faith tradition, in the critical analysis of the arts, media, technology and information systems to enhance the quality of life.

A Reflective and Creative Thinker who

- CGE3a** -recognizes there is more grace in our world than sin and that hope is essential in facing all challenges;
- CGE3b** -creates, adapts, evaluates new ideas in light of the common good;
- CGE3c** -thinks reflectively and creatively to evaluate situations and solve problems;
- CGE3d** -makes decisions in light of gospel values with an informed moral conscience;
- CGE3e** -adopts a holistic approach to life by integrating learning from various subject areas and experience;
- CGE3f** -examines, evaluates and applies knowledge of interdependent systems (physical, political, ethical, socio-economic and ecological) for the development of a just and compassionate society.

A Self-Directed, Responsible, Life Long Learner who

- CGE4a** -demonstrates a confident and positive sense of self and respect for the dignity and welfare of others;
- CGE4b** -demonstrates flexibility and adaptability;
- CGE4c** -takes initiative and demonstrates Christian leadership;
- CGE4d** -responds to, manages and constructively influences change in a discerning manner;
- CGE4e** -sets appropriate goals and priorities in school, work and personal life;
- CGE4f** -applies effective communication, decision-making, problem-solving, time and resource management skills;
- CGE4g** -examines and reflects on one's personal values, abilities and aspirations influencing life's choices and opportunities;
- CGE4h** -participates in leisure and fitness activities for a balanced and healthy lifestyle.

A Collaborative Contributor who

- CGE5a** -works effectively as an interdependent team member;
- CGE5b** -thinks critically about the meaning and purpose of work;
- CGE5c** -develops one's God-given potential and makes a meaningful contribution to society;
- CGE5d** -finds meaning, dignity, fulfillment and vocation in work which contributes to the common good;
- CGE5e** -respects the rights, responsibilities and contributions of self and others;
- CGE5f** -exercises Christian leadership in the achievement of individual and group goals;
- CGE5g** -achieves excellence, originality, and integrity in one's own work and supports these qualities in the work of others;
- CGE5h** -applies skills for employability, self-employment and entrepreneurship relative to Christian vocation.

A Caring Family Member who

- CGE6a** -relates to family members in a loving, compassionate and respectful manner;
- CGE6b** -recognizes human intimacy and sexuality as God given gifts, to be used as the creator intended;
- CGE6c** -values and honours the important role of the family in society;
- CGE6d** -values and nurtures opportunities for family prayer;
- CGE6e** -ministers to the family, school, parish, and wider community through service.

A Responsible Citizen who

- CGE7a** -acts morally and legally as a person formed in Catholic traditions;
- CGE7b** -accepts accountability for one's own actions;
- CGE7c** -seeks and grants forgiveness;
- CGE7d** -promotes the sacredness of life;
- CGE7e** -witnesses Catholic social teaching by promoting equality, democracy, and solidarity for a just, peaceful and compassionate society;
- CGE7f** -respects and affirms the diversity and interdependence of the world's peoples and cultures;
- CGE7g** -respects and understands the history, cultural heritage and pluralism of today's contemporary society;
- CGE7h** -exercises the rights and responsibilities of Canadian citizenship;
- CGE7i** -respects the environment and uses resources wisely;
- CGE7j** -contributes to the common good.

Unit 3: Human Resource Organization

Time: 25 hours

Unit Description

Students explore a variety of organizational structures. Specifically, they explain how organizational design trends and the changing role of management are modernizing the traditional structures evident in organizations today. Students recognize that management must respect the rights, responsibilities, and contributions of its employees. Through this exploration, students become conscious of how an organization can effectively address its staffing issues.

Unit Synopsis Chart

Activity	Time	Learning Expectations	Assessment Categories	Tasks
3.1 Organizational Structures	10 hours	HRV.01, HRV.02, HR1.01, HR1.02, HR1.03, HR1.04, HR2.03, IS5.01 CGE2e, 3c, 4d, 5a, g, h, 6c, 7b, f, h, i, j	Knowledge/Understanding Application Thinking/Inquiry	Organizational Charts, Organizational Design
3.2 The Changing Nature of Work	7 hours	HRV.02, HR2.01, HR2.02, HR2.03 CGE1h, 3b, c, d, f, 4b, d, e, g, 5a, c, d, e, g, h, 7b, f, h, j	Knowledge/Understanding Application Thinking/Inquiry Communication	Job Design Strategies, Alternative Working Schedules
3.3 Staffing	8 hours	HRV.03, HR3.01, HR3.02, HR3.03, IS2.03 CGE1h, 2e, 3d, 4e, g, 5e, g, h, 7f, h, j	Knowledge/Understanding Application Thinking/Inquiry Communication	Research Project on Staffing Issues

Activity 3.1: Organizational Structures

Time: 10 hours

Description

Students evaluate different corporate structures based on benchmarks such as productivity, competitive advantage, and corporate culture. Furthermore, students examine the relationship between a company's organizational design and its employees' quality of work life.

Strand(s) & Expectations

Strand(s): Human Resource Organization

Ontario Catholic School Graduate Expectations

CGE 2e - uses and integrates the Catholic faith tradition in the critical analysis of the arts, media, technology, and information systems to enhance the quality of life;

CGE 3c - thinks reflectively and creatively to evaluate situations and solve problems;

CGE 4d - responds to, manages, and constructively influences change in a discerning manner;

CGE 5a - works effectively as an interdependent team member;

CGE 5g - achieves excellence, originality, and integrity in one's own work, and supports these qualities in the work of others;

CGE 5h - applies skills for employability, self-employment, and entrepreneurship relative to Christian vocation;

CGE 6c - values and honours the important role of the family in society;

CGE 7b - accepts accountability for one's own actions;

CGE 7f - respects and affirms the diversity and interdependence of the world's peoples and cultures;

CGE 7h - exercises the rights and responsibilities of Canadian citizenship;

CGE 7i - respects the environment and uses resources wisely;

CGE 7j - contributes to the common good.

Overall Expectations

HRV.01 - demonstrate an understanding of the various organizational structures used to manage the workforce effectively;

HRV.02 - identify and describe the ways in which organizational structures have changed to adapt to the changing nature of work.

Specific Expectations

HR1.01 - demonstrate an understanding of traditional organizational structures (e.g., functional, divisional, hybrid);

HR1.02 - assess current organizational structures in terms of the ways in which they increase productivity and competitive advantage;

HR1.03 - explain the managerial role in dealing with organizational trends in the modern marketplace (e.g., trends such as shorter chain of command, wider span of control, more delegation, empowerment);

HR1.04 - demonstrate an understanding of how organizational design (e.g., communication channels, team structures, alternative work schedules) can support a positive corporate culture;

HR2.03 - compare the strengths and weaknesses of various work settings and arrangements for individuals and groups (e.g., job sharing, self-managed teams, work schedules, working off-site, contract work);

IS5.01 - identify and describe management roles and the different levels of management.

Planning Notes

- Appendix 3.1.1 should be modified as organizational trends change over time.
- The teacher should have examples of organizational charts of companies from different industries on file. Organizational charts can typically be found in the annual reports of publicly traded companies.
- Students should know the distinction of staff/line relationships before this activity is introduced.

Teaching/Learning Strategies

1. Define the following terms: organization, organizing, division of labour, and organizational purpose. Illustrate the importance of the organizing function and how it relates to the other major functions of management, e.g., organizational planning, leadership, and motivation and evaluation.
2. Differentiate between formal and informal structure. Compare and contrast the advantages and disadvantages of the traditional organizational structures with respect to elements such as productivity, competitive advantage, corporate culture, and quality of work life, e.g., functional, divisional, hybrid, matrix, network, etc. Students should receive graphical illustrations of each type.
3. Hand out Appendix 3.1.1 – Structural Principles, that outlines the four major structural principles that should be adhered to when structuring a company, and which outlines the current trends for each.
4. Hand out several copies of organizational charts, e.g., retail sector, manufacturing sector, professional sector. Discuss the elements of an organization that can be determined through the examination of an organizational chart, e.g., chain of command, division of labour, tasks, staff and line relationships, etc.

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5. Hand out Appendix 3.1.2 – Organizational Chart. Have students construct an organizational chart and complete a staff/line exercise.
 6. Define organizational design. In a table, compare and contrast mechanistic and organic design alternatives with respect to the hierarchy of authority, rules and procedures, division of labour, spans of control, and co-ordination. Illustrate examples of mechanistic and organic designs, e.g., mechanistic – machine, professional, and divisional bureaucracy; organic – simple structure and adhocracy.
 7. Have students complete a checklist exercise where they select which organizational features belong to a mechanistic or organic design.
 8. Discuss how the following contingency factors impact organizational design: environmental uncertainty, strategy and objectives, technology, size of the company and its life cycle, and human resources. Hand out Appendix 3.1.3 – Organizational Design Guidelines.
 9. Hand out Appendix 3.1.4 – Organizational Structure Assignment. Have students complete this assignment in pairs.
 10. Students write a test at the end of this activity.

Assessment & Evaluation of Student Achievement

Formative

- Checklist exercise that has students select which organizational features belong to a mechanistic or organic design.
- Appendix 3.1.2 – Organizational Chart (Knowledge/Understanding, Application, Thinking/Inquiry)
- Appendix 3.1.4 – Organizational Structure Assignment (Knowledge/Understanding, Application, Thinking/Inquiry)

Summative

- Written test (Knowledge/Understanding, Thinking/Inquiry, Communication)
- Written report for organizational structure assignment if prepared by individual students (using a teacher-developed rubric)

Resources

Schermerhorn, John R. *Management*, 6th ed. New York, NY: John Wiley and Sons, Inc., 2001. ISBN 0-471-38755-X

Schermerhorn, J.R., R.J. Cattaneo, and A. Templer. *Management: The Competitive Advantage*. Toronto, Ontario: John Wiley and Sons Canada Limited, 1995. ISBN 0-471-64110-3

Appendix 3.1.1

Structural Principles

Scalar Principle – clear and unbroken chain of command linking every person in the organization with successively higher levels of authority up to the chief executive officer

- **current trend** – progressive organizations are keeping the chain of command as short as possible; organizations are becoming “flatter” as unnecessary levels of management are eliminated

Unity of Command Principle – each person in an organization should report to one and only one superior

- **current trend** – organizations are using more cross-functional teams, task forces, and matrix-type structures, and they are becoming more customer-conscious; as they do so, employees often find themselves working for more than one “boss”

Span of Control Principle – there is a limit to the number of persons one manager can effectively supervise

- **current trend** – organizations are operating with wider spans of control, as individual managers take responsibility for supervising larger numbers of subordinates and the chain of command grows flatter

Authority – Responsibility Principle – authority should equal responsibility when work is delegated from supervisor to subordinate

- **current trend** – managers in progressive organizations are delegating more and finding more ways to empower people at all levels to make more decisions affecting themselves and their work
- **current trend** – while empowerment and related forces are contributing to more decentralization in organizations, advances in information technology simultaneously allow for the retention of centralized control

Appendix 3.1.2

Organizational Chart

Instructions

1. Study the following set of positions found at the upper management level of a business firm.
Positions: Chair of the Board, Sales Manager, Production Manager, Secretary-Treasurer, Controller, Vice President, Engineering, Quality Assurance Manager, Vice President, Marketing, Advertising Manager, Legal Counsel, and President
2. Draw an organizational chart that arranges these positions in a logical fashion (Hint: use functional departmentalization).
3. Identify each position as either a staff or line appointment.

Appendix 3.1.3

Organizational Design Guidelines

Contingency Factors	Mechanistic	Organic
Environmental Uncertainty	Low	High
Strategy and Objectives	Stability	Growth
Technology	Long-linked and mass production	Small-batch and intensive
Size and Life Cycle	It depends	It depends
Human Resources	Preferences for routine and task direction	Preferences for autonomy and task variety

Appendix 3.1.4

Organizational Structure Assignment

Johnson Candy Company

1. Prepare an organizational chart for Johnson Candy Company. Its manufacturing plant is divided into the following departments:
 - a. Production – a production manager, an administrative assistant, a candy production supervisor, five candy producers, a clerk, two material handlers, three forepersons, fifty workers, and three janitors
 - b. Engineering – a plant engineer, an assistant plant engineer, a head line mechanic, five line mechanics, a utilities mechanic, a utility serviceman, a machine shop mechanic, and two equipment mechanics
 - c. Quality Control – a chief analyst, an assistant analyst, a technician, and a sample inspector
 - d. Purchasing – a purchasing manager, an administrative assistant, a buyer, and two administrative associates
 - e. Traffic – a traffic manager, an administrative assistant, a traffic supervisor, a warehouse supervisor, a shipper/receiver, and five stockpersons
 - f. Accounting – an accounting manager, a secretary, an accountant, two junior accountants, a ledger clerk, two cash clerks, a payroll clerk, and a receptionist
 - g. Marketing – a marketing manager, five marketing associates, and ten sales representatives
 - h. Human Resources – a human resource manager, an administrative assistant, a senior office clerk, and four administrative associates

In addition, the heads of the various departments are responsible to the plant manager, who in turn is responsible to the company president.
2. Explain briefly what you consider to be the duties of each department.
3. Redesign this company applying the current trends in organizational design. In addition, in a one-page report, outline which aspects would be mechanistic or organic, and why. Your justification should mention the “contingency factors,” e.g., technology and human resources that impact organizational design.

Activity 3.2: The Changing Nature of Work

Time: 7 hours

Description

Students learn the importance of the changing nature of work. They understand how businesses are forced to make adjustments to accommodate today's workforce, to ensure job satisfaction and performance. Students look at organizational structures and how businesses plan to succeed in this rapidly changing environment, in light of our gospel values.

Strand(s) & Learning Expectations

Ontario Catholic School Graduate Expectations

CGE 1h - respects the faith traditions, world religions and the life journeys of all people of good will;
CGE 3b - creates, adapts, and evaluates new ideas in light of the common good;
CGE 3c - thinks reflectively and creatively to evaluate situations and solve problems;
CGE 3d - makes decisions in light of gospel values with an informed moral conscience;
CGE 3f - examines, evaluates, and applies knowledge of interdependent systems for the development of a just and compassionate society;
CGE 4b - demonstrates flexibility and adaptability;
CGE 4d - responds to, manages, and constructively influences change in a discerning manner;
CGE 4e - sets appropriate goals and priorities in school, work, and personal life;
CGE 4g - examines and reflects on one's personal values, abilities, and aspirations influencing life's choices and opportunities;
CGE 5a - works effectively as an interdependent team member;
CGE 5c - develops one's God-given potential and makes a meaningful contribution to society;
CGE 5d - finds meaning, dignity, fulfillment, and vocation in work which contributes to the common good;
CGE 5e - respects the rights, responsibilities, and contributions of self and others;
CGE 5g - achieves excellence, originality, and integrity in one's own work and supports these qualities in the work of others;
CGE 5h - applies skills for employability, self-employment, and entrepreneurship relative to Christian vocation;
CGE 7b - accepts accountability for one's own actions;
CGE 7f - respects and affirms the diversity and interdependence of the world's peoples and cultures;
CGE 7h - exercises the rights and responsibilities of Canadian citizenship;
CGE 7j - contributes to the common good.

Strand(s): Human Resource Organization

Overall Expectations

HRV.02 - identify and describe the ways in which organizational structures have changed to adapt to the changing nature of work.

Specific Expectations

HR2.01 - assess the relationship between the individual and an organization, considering issues such as the meaning of work, the psychological contract, the quality of work life, and job satisfaction;
HR2.02 - compare alternate job-design approaches;
HR2.03 - compare the strengths and weaknesses of various work settings and arrangements for individuals and groups.

Prior Knowledge and Skills

- Students must have basic Internet research skills to find magazines, books, and newspaper articles on specific topics.

Planning Notes

- The teacher should make arrangements to use a computer lab with Internet capabilities.
- Students should be familiar with the web browser.
- A television and VCR is required to show the A&E video on Sam Walton or a video about another successful business person.
- If a field trip to a local business is planned the teacher must follow board and school policies related to out-of-school activities.

Teaching/Learning Strategies

1. The teacher leads a discussion by examining positive and negative viewpoints towards working for an organization. Students focus on why people work and what satisfaction they get from it. The teacher introduces the role that management plays in evaluating individual and team performance, and how this contributes to employees' overall perception of work.
2. In pairs, students generate a list of factors that contribute to the quality of life and job satisfaction. Results can be shared with the class and put on the board. Using this as a guide, students try to identify the different ways that an organization can increase job satisfaction. A comparison of how managers currently motivate and use performance appraisals in a work environment can be done to accomplish this.
3. Students read Appendix 3.2.1 – Job Design Alternatives. Students identify the differences in each scenario and indicate how the employee would feel about the job setting. Provide Appendix 3.2.2 – Job Design Approaches, highlighting job rotation, simplification, enrichment, and enlargement.
4. Split up the class into four groups with each group acting as an advocate for a different job design approach. Students do some additional research on their approach and formulate an answer as to why their approach is best. In their research, they are encouraged to identify as many weaknesses of the other approaches as possible. It would be advantageous for students to visit a local business to see which job design approach they favour.
5. Generate a discussion on the importance of and need for adopting flexible work schedules. Identify the major reasons for this change and why it is important that businesses adopt it. Provide a note on a variety of work settings and job arrangements.
6. Students list the following terms: job sharing, flextime plans, compressed workweek, working at home, self managed teams, working off-site, and contract work. For each term, students list all of the advantages and disadvantages.
7. As an assignment, each student interviews at least one person, e.g., parents, relatives, friends, or neighbours, who work under flextime, compressed time, or part-time systems, regarding his/her experiences and preferences. Prior to the interview, students develop a questionnaire with the teacher. **Note:** Students must be instructed to accept “no comment” as a valid answer to any questions, and to respect that people may choose not to respond at all.
8. Using this information, students draft a proposal to a hypothetical company's management, advocating the option of having flexible hours or workweek.
9. As a concluding activity, show the A&E video on Sam Walton or another successful business person. This video focuses on the success of Wal-Mart through employee job satisfaction. Students identify all the different ways that Wal-Mart has adopted to the changing nature of work.
10. Students complete a test on this activity.

Assessment and Evaluation of Student Achievement

Formative

- Job Design Approach Assignment (Knowledge/Understanding, Thinking/Inquiry)
- Interview Assignment (Knowledge/Understanding, Thinking/Inquiry, Communication)

Summative

- Test (Knowledge/Understanding, Thinking/Inquiry, Communication)

Resources

Print Resources

Cook, Curtis. *Management & Organizational Behavior with PowerWeb*. Toronto, Ontario: McGraw-Hill Ryerson, 2001. ISBN 0072508337

Ivancevich, John. *Human Resource Management*. Toronto, Ontario: McGraw-Hill Ryerson, 2001. ISBN 0072312688

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E-Business Magazine – <http://www.ebusiness.uk.com>

Non-print material

A&E television networks, “Sam Walton.” New York: New Video Group, 1997. 50 min.

Appendix 3.2.1

Job Design Alternatives

In Job 1, Remo reports to a workstation on a computer assembly line. A partially assembled circuit board passes in front of him on a conveyor belt every 90 seconds. He adds two pieces to each board and lets the conveyor take the unit to the next workstation. Quality control is handled at a separate station at the end of the line. Everyone gets a 10-minute break in both the morning and afternoon, and a 30-minute lunch period. Remo works by himself in a quiet setting.

In Job 2, Remo works on the same assembly line. Now, however, a circuit board comes to his station every 12 minutes, and he performs a greater number of tasks. He adds several pieces to the board, adds a frame, and installs several electric switches. Remo periodically changes stations with one of the other workers and performs a different set of tasks on earlier or later stages of the same circuit board. In all other respects, the work setting is the same as the first job described.

In Job 3, Remo is part of a team responsible for completely assembling circuit boards for computers. The team has a weekly production quota but creates its own plans for the speed and arrangement of the required assembly processes. The team is also responsible for inspecting the quality of the finished boards and for correcting any defective units. These duties are shared among the members and are discussed at team meetings. Remo has been selected by the team as its plant liaison. In addition to his other duties, he works with people elsewhere in the plant to resolve any production problems and achieve plant-wide quality objectives.

Appendix 3.2.2

Job Design Approaches

Job Enrichment – a motivational strategy that emphasizes motivating the worker through the job itself. Five characteristics of work are believed to be important in affecting individual motivation and performance:

- a) **Skill Variety** – the extent to which a job demands different skills of the person
- b) **Task Identity** – the degree to which the job requires working toward a visible outcome from the beginning to the end
- c) **Task Significance** – the degree to which the job has substantial impact on the lives or work of others in the company
- d) **Autonomy** – the degree of freedom, independence, and discretion in scheduling work and determining procedures
- e) **Feedback** – the amount of direct and clear information that is received about job performance

Job Simplification – producing task efficiency by breaking down the job into simple steps and assigning people to each of those steps

Job Enlargement – job enrichment strategy combining a series of tasks into one assignment that is more challenging and interesting

Job Rotation – job enrichment strategy involving moving employees from one job to another

Activity 3.3: Staffing

Time: 8 hours

Description

Students demonstrate an understanding of the various organizational structures used to manage the workforce effectively. They explore the legal and ethical considerations of wage structures, employment equity, health and safety, and employee rights. Furthermore, students analyse the relationship between an organization's objectives and the human resource function. Finally, students explain the strategies and concepts involved in developing a quality workforce.

Strand(s) & Learning Expectations

Ontario Catholic School Graduate Expectations

CGE1h - respects the faith traditions, world religions and the life journeys of all people of good;

CGE2e - uses and integrates the Catholic faith tradition in the critical analysis of the arts, media, technology, and information systems to enhance the quality of life;

CGE3d - makes decisions in light of gospel values with an informed moral conscience;

CGE4e - sets appropriate goals and priorities in school, work, and personal life;

CGE4g - examines and reflects on one's personal values, abilities, and aspirations influencing life's choices and opportunities;

CGE5e - respects the rights, responsibilities, and contributions of self and others;

CGE5g - achieves excellence, originality, and integrity in one's own work and supports these qualities in the work of others;

CGE5h - applies skills for employability, self-employment, and entrepreneurship relative to Christian vocation;

CGE7f - respects and affirms the diversity and interdependence of the world's peoples and cultures;

CGE7h - exercises the rights and responsibilities of Canadian citizenship;

CGE7j - contributes to the common good.

Strand(s): Staffing

Overall Expectations

HRV.03 - demonstrate an understanding of staffing issues.

Specific Expectations

HR3.01 - identify and describe the impact and importance of legal considerations in the staffing process, including issues such as wages, employment equity, health and safety, and employee rights;

HR3.02 - analyse the relationship between an organization's objectives and the human resource process (e.g., planning, recruitment, selection);

HR3.03 - explain the strategies and concepts involved in developing a quality workforce (e.g., orientation, training, career development);

IS2.03 - analyse major challenges facing today's organizations (e.g., new technologies, the influence of the Internet, globalization, employment equity legislation) with reference to specific organizations.

Prior Knowledge & Skills

- Students should know how to conduct Internet searches before performing this activity.

Planning Notes

- The teacher arranges to use computers with Internet connection.
- Make sure that all students know and follow proper Internet usage procedures. The teacher should also give students guidelines on presentation techniques for electronic or oral presentations.

-
- The teacher examines the collective agreement in Appendix 3.3.4 beforehand so that notes can be provided to students to define/explain the purpose of each article of the agreement.
 - The culminating project is introduced upon the completion of this activity. Students are divided up heterogeneously into groups of four. There should be an even number of management and labour teams created.
 - Students learn negotiation skills and all of the nuances that arise during the negotiation process. This information is needed when students outline their negotiating strategies in Part I of the culminating project.
 - The teacher outlines the minimum legal requirements that each student must be aware of with respect to the articles being negotiated. Students visit the Ontario Employment Standards Act website (www.gov.on.ca) to read about topics such as vacation pay and public holidays to provide a foundation of knowledge before their negotiations begin.
 - Students should be given time to complete the Collective Bargaining Project during class time. Students should be advised to make copies of Part I of the Bargaining Book before they hand it in for assessment. They will need it to aid in their negotiations. Students must realize that once Part I is handed in, they can't change any of their propositions.
 - Ensure that students are immersed in the motivation and evaluation strand before Part I of the culminating activity is officially due in its entirety. Sections of Part I should be handed in on a weekly basis so that the teacher will receive the last part during the coverage of the last strand. Part II should be due at the end of the course.
 - Students have a week of class time to negotiate a new collective agreement.
 - Students should focus on concepts such as job design, descriptions, and specifications when they are negotiating Article 6.0 – Technological Change.

Teaching/Learning Strategies

1. The teacher will lead a class discussion to identify and describe the impact and importance of legal considerations in the staffing process, including issues such as wages, employment equity, health and safety, and employee rights.
2. Hand out Appendix 3.3.1 – Selection Chart. Discuss with the class how organizations select and reject candidates.
3. Handout Appendix 3.3.2 – Organizational Objectives and Human Resource Goals Chart. The teacher gives a lecture on the various aspects of the chart, emphasizing how human resource goals must fit into the overall planning process, and how Human Resources must be evaluated.
4. Introduce Appendix 3.3.3 – Research Report and Presentation for Staffing Assignment. The teacher should allow some in-class time so groups can get organized and start to gather research. However, some portions of the report should be done for homework. The teacher should allow 20 minutes for each presentation.
5. Introduce The Collective Bargaining Project (Appendix 3.3.4 – Collective Bargaining Culminating Project) (see Planning Notes).

Assessment & Evaluation of Student Achievement

Diagnostic

- Informal observation of in-class discussions

Formative

- Feedback on draft research report and presentation (Knowledge/Understanding, Thinking/Inquiry, Communication, and Application) (Peer and teacher)

Summative

- Final research report and presentation. (Rating scale or rubric) (Students should be evaluated separately on their contributions by the teacher.)
- Written test (Knowledge/Understanding, Application, Thinking/Inquiry, Communication)

Resources

Caetano, R., J. Schermerhorn, and A. Templer. *Management For Productivity*. Toronto, Ontario: John Wiley & Sons, 1995.

Work Place Safety and Insurance Board of Ontario – <http://www.wsib.on.ca/>

Human Resources Development Canada Employment Standards Act – http://labour-travail.hrdc-drhc.gc.ca/psait_spila/lmnc_eslc/index.cfm?fuseaction=english

Standards Legislation, Employment Support of Persons with Disabilities – http://www.on.hrdc-drhc.gc.ca/toronto/english/programs/programs_e.shtml

Appendix 3.3.1

Selection Criteria

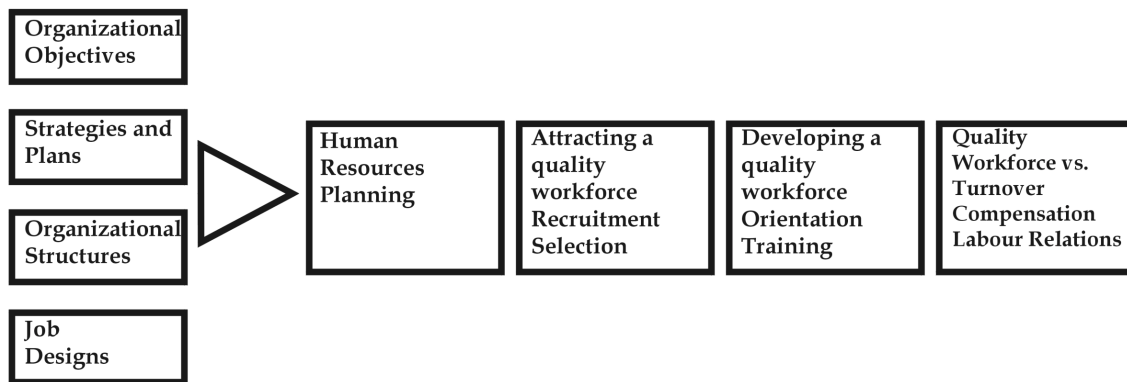
Selection Process	Reasons for Acceptance	Reasons for Rejection
1) Formal application	1) Sufficient qualifications	1) Deficient qualifications
2) Interview	2) Sufficient interpersonal and communication skills	2) Poor interpersonal and communication skills
3) Testing	3) Good test scores	3) Poor test scores
4) Reference checks	4) Good references	4) “Unfavourable references
5) Physical exam	5) Physically fit	5) Physically unfit for the job
6) Analysis and decisions	6) Overall potential is good	6) Overall potential is low

The candidate must score well on all the above requirements in order to be selected.

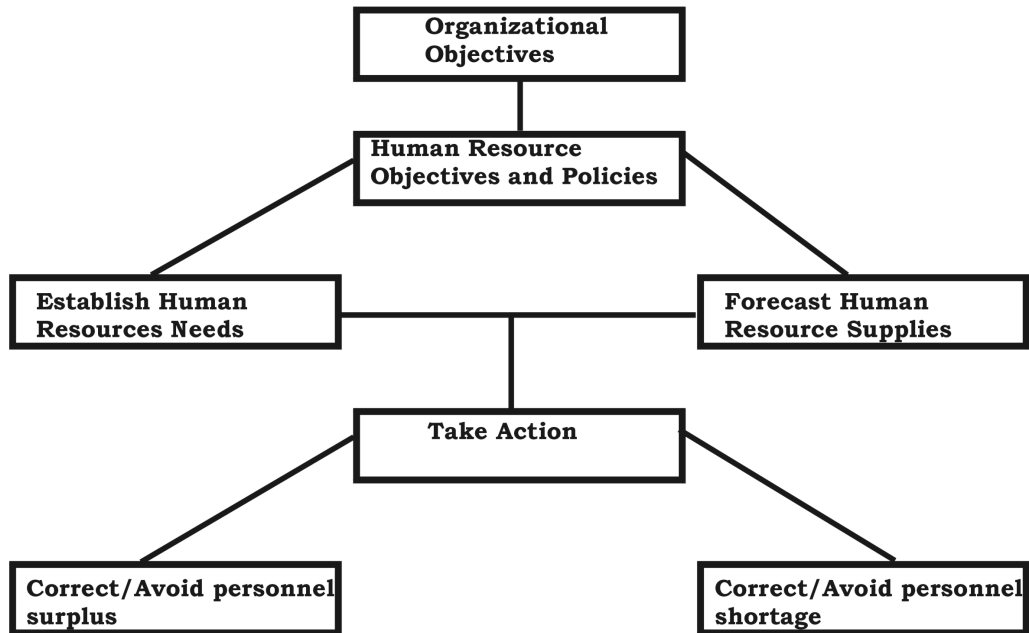
If the candidate is lacking in any of the requirements, it may cause him/her to be rejected depending on how crucial that criteria is to the job.

Appendix 3.3.2

Organizational Objectives and Human Resource Goals Chart



Appendix 3.3.2 (Continued)



Appendix 3.3.3

Research Report and Presentation on Staffing Assignment

- Prepare a group research report and presentation.
- Analyse and prepare a report on a publicly traded company.
- This report should focus on staffing issues.
- The group gives an overview of what companies are required to do according to federal and provincial laws. Students will gain this information from the websites listed in the Resources section, e.g., Human Resources Development Canada. The group then explains how the company has met or (in most cases) exceeded these legal requirements.
- Where possible, students research the company's compensation programs. Some job openings might be posted with salary ranges (some executive salaries may be made available to the public).
- The report must also contain information regarding the company's employment equity and health and safety programs.
- There should be a discussion about whether the company is reaching its prescribed goals.
- The report also contains the strategies the company is using to develop a quality workforce.
- Once the report is complete, students present their findings to the class.
- Students can get most of their information from company annual report, government reports, and websites.

Appendix 3.3.4

Collective Bargaining Culminating Project

Collective Bargaining Game: The Bargaining Book

Your objective is to thoroughly examine each article in the present collective agreement of the “Upper Canada Bank” which is part of this handout. If your group is representing management, your prime objective is to improve management rights, productivity, and the quality of work life for your employees. If your group is representing labour, your prime objective is to improve the “bread and butter” issues such as compensation, benefits, and working conditions as outlined under the collective agreement.

As part of the collective bargaining game, student teams must submit a Bargaining Book (BB). The BB consists of two parts and focuses exclusively on the five outstanding issues.

Part I

The first part of the BB consists of your opening position, goals (i.e., your targets or preferred areas of settlement), and fall-back positions (i.e., your bottom-line positions or resistance points on the issues). The best way to handle this is to outline the positions you’ve taken and the underlying rationale or justification for your positions. You should also attempt to evaluate the opposing team’s fall-back positions on the issues. Your team should develop a negotiating strategy (minimum two pages) and outline it at the end of Part 1. To achieve uniformity, follow the format in the example below:

Article 1 Intent and Purpose

- a) Opening Position: no change
- b) Goal: no change
- c) Fall-back Position: no change
- d) Rationale: The present clause has worked satisfactorily and we see no need to change it.
- e) Opponent’s Fall-Back Position: no change

The same format should be followed for each issue. Obviously, your BB will be far more complex than this illustration. Nevertheless, limit yourself to a maximum of one page per article. For items a, b, c, d, and e, try to summarize each position in one or two sentences. Once you have completed the description of issues, explain your strategy in about one page. This should include a discussion of your priorities, possible bargaining tradeoffs, and how you intend to persuade your opponent.

Part II

The second part of the BB involves the following requirements: in the event of an impasse, both teams involved must submit final reports to the instructor analysing why and on which issues the bargaining failed. Those teams that reach an agreement must describe the changes to the contract, and analyse the results. Part II should be no longer than four to five pages.

Evaluation

Each group member is evaluated according to his or her written contribution to the BB. The group must allocate the workload equitably and indicate who is responsible for each part of the BB. As well, the chairperson of the team is responsible for coordinating activities and ensuring that all components of the BB are intact. Students will be given the opportunity to assess their peer’s performance at the bargaining table by providing valuable feedback of improvement in performance.

Appendix 3.3.4 (Continued)

Collective Bargaining Simulation

The Upper Canada Bank Simulation

I Simulation Ground Rules

- There must be no collusion between the different groups involved in the simulations.
- All presentations and background information used must be consistent with information presented in this section. N.B. Banks are under federal jurisdiction and are covered by the provisions of the Canada Labour Code.
- In all negotiations you must give your opponents a fair hearing and permit them to develop their position.

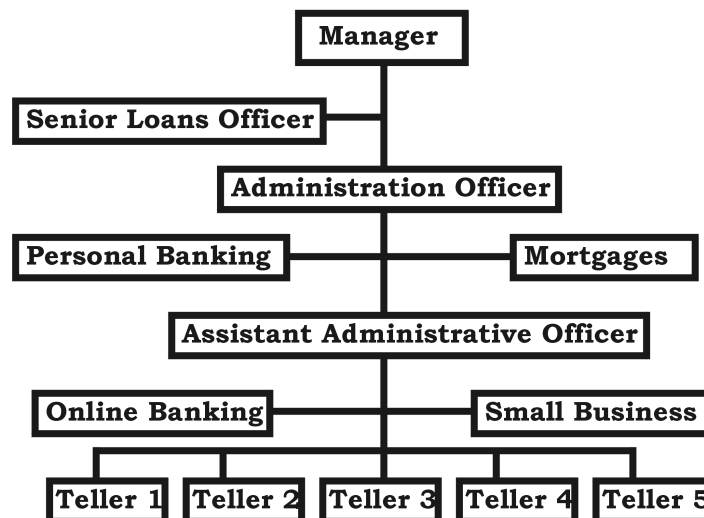
II Background Information

The Upper Canada Bank is one of the nation's chartered banks, with branches located in every province. According to a financial report on the banking industry prepared in the mid-1990s, "the Upper Canada Bank represents the average of the Canadian banking industry." This is illustrated by the figures contained in the following report:

Chartered Bank	Number of Employees	Expenditures on Salaries, Employee Benefits (millions)	Salary and Expenditures as a % of Revenue
Upper Canada Bank	25 000	350	17
Bank A	35 000	380	15
Bank B	20 000	260	18
Bank C	28 000	300	19
Bank D	40 000	420	14
Bank E	18 000	200	16

The Power Centre Branch is located in a major shopping centre. Table 1 shows the organization of the Power Centre Branch and Table 2 shows the current salaries prevailing in the bargaining unit.

Table 1: Organizational Chart



Appendix 3.3.4 (Continued)

Table 2: Current Salaries, Benefits, and Overtime

Position	Current Monthly Salary (\$)	Average Cost of Employee Benefits Per Month (\$)	Average Hours of Overtime Per Month
Teller 1 – Category A	2400	112.50	5
Teller 2 – Category B	2780	116.25	5
Teller 3 – Category C	2800	120.00	5
Teller 4 – Category D	2920	123.75	5
Teller 5 – Category E	2980	125.25	4
Online Banking Clerk	3000	127.50	3
Small Business Clerk	3100	129.25	3
Personal Banking Clerk	3250	131.30	3
Mortgages Clerk	3280	135.25	3
Loans Clerk	3300	140.50	2
Total Cost of Bargaining Unit	29 810	1261.55	

III

The Bankers Union of Canada (BUC) is an independent union which has applied for certification in ten branches of the Upper Canada Bank, and has been successfully certified in four of these branches. So far, the Power Centre Branch is the only branch with a collective agreement in effect. The BUC has refused to accept any financial support from other segments of the trade union movement on the basis that “it is capable of surviving without interference from organizers who know nothing about bank employees.”

The History of Labour Relations in the Upper Canada Bank

About four years ago, a group of dissatisfied workers at the Power Centre Branch started a drive to join a union. The bitter struggle between the employees’ union and management that ensued resulted in a series of charges and counter-charges being laid before the Canada Labour Relations Board. In its ruling, the Canada Labour Relations Board certified the BUC as the bargaining agent for the employees at the bank branch without a representation vote. The Board stated in its decision that management had created conditions whereby employees could not independently reflect their true wishes in the matter of certification.

Negotiations dragged on for two years. During the duration, each party consistently accused the other of “bad-faith bargaining” and progress was very slow. The parties finally agreed to accept the recommendations of a conciliation commissioner to resolve the impasse. The terms and conditions of their settlement are outlined in the two-year collective agreement reproduced in the next section.

Appendix 3.3.4 (Continued)

The Collective Agreement

**The Upper Canada Bank, Power Centre Branch (hereinafter referred to as “the Employer”)
and
The Bankers Union of Canada (BUC), Local 1 (hereinafter referred to as “the Union”)**

Article 1.0 – Union Recognition

- 1.01. The Employer recognizes the Union as the exclusive bargaining agent for its regular full-time employees who are on the payroll at the Power Centre Branch of the Upper Canada Bank.
- 1.02. The term “Employee” or “Employees,” whenever used, shall mean only those persons coming within the bargaining unit as defined above unless the context otherwise applies. The term “Regular Full-Time Employee,” whenever used, shall mean only those persons coming within the bargaining unit who are normally scheduled to work thirty-seven and one-half (37 1/2) hours per week unless the context otherwise applies. The term “Regular Part-Time Employees,” whenever used, shall mean those persons coming within the bargaining unit who are normally scheduled to work twenty (20) hours or more per week.

Article 2.0 – Management Rights

- 2.01. The Union recognizes and agrees that except as specifically abridged, delegated, granted, or modified by this Agreement, all of the rights, powers, and authority which the employer had prior to the signing of this agreement are retained solely and exclusively by the Employer.

Article 3.0 – Union Security

- 3.01 Upon receipt of a written authorization duly signed by the employee, the bank agrees to deduct the regular monthly dues from the wages of employees who are members of the Union on the date of execution of this Agreement, or who become members thereafter.

Article 4.0 – Grievance Procedure

- 4.01 “Grievance” means any difference or dispute concerning the interpretation, application, or alleged violation of this collective agreement, whether between the Employer and any employee(s) bound by the collective agreement, or between the Employer and the Union.
- 4.02 In order not to interfere with operations, it is agreed that research or preparation of a complaint or grievance will be done outside the working hours of the aggrieved employee and/or Steward. Presentation of a complaint or grievance to management by the aggrieved employee and/or Steward may be done within normal working hours, but wherever possible it should be done outside the hours the branch is open to the public. In order to attend a complaint meeting or grievance meeting, the Steward and/or employee must first obtain permission from the Administration Officer, who will maintain a record of such absences, and when resuming regular duties, will report to the Administration Manager.
- 4.03 Grievances shall be settled in the following manner:

Appendix 3.3.4 (Continued)

Step I

The employee involved, who may be accompanied by the Steward, shall first take up the complaint with the Administration Officer within five (5) working days from the date on which the event or circumstances giving rise to the complaint occurred or originated. The Administration Officer shall report his decision to the employee within two (2) working days of having heard the complaint.

Step II

If the complaint is not resolved at Step I, within five (5) working days of the Step I decision the matter shall be presented by the Union to the aggrieved employee's manager in writing, stating the particulars of the grievance, the specific Article(s) of the Agreement said to be violated, and the remedy sought. The Branch Manager or his designee shall hold a meeting between Employer representatives and the employee, who may be accompanied by the Steward and the Union Business Agent if necessary, within five (5) working days of the receipt of the written grievance. Within two (2) working days of this meeting, the Branch Manager shall answer the grievance in writing on the grievance form and return a copy thereof to the employee.

Step III

If the grievance is not resolved at Step II, it shall be referred to the District Manager within ten (10) working days of the receipt of the decision rendered at Step II, together with written reasons for the rejection of the Step II decision. The District Manager or his designee shall hold a meeting between Employer representatives and the employee, who shall be accompanied by a representative of the Union, within ten (10) working days of receipt of the written grievance. Within ten (10) working days of the meeting, the District Manager will reply to the employee in writing.

Article 5.0 – Strikes and Lockouts

- 5.01 The Employer agrees that there will be no lockout of employees during the term of this collective agreement.
- 5.02 The Union agrees there shall be no strike, work stoppage, slowdown, picketing, interruption, or interference with work or the Employer's operation during the term of this collective agreement. No officer or representative of the Union shall authorize, instigate, aid, or condone any such activities.
- 5.03 The Union agrees that it will not interfere or permit any of the employees in the bargaining unit to interfere with the operations of the branch.

Article 6.0 – Technological Change

- 6.01 The Employer agrees that it will provide the Union with as much notice as possible, but not less than ninety (90) calendar days' notice, prior to the introduction of automated equipment or change in administrative procedure related thereto which is substantially different in nature or kind than that previously used, which will result in the reduction of a number of employees in the bargaining unit.

Appendix 3.3.4 (Continued)

- 6.02a In the event that the Employer introduces automated equipment which requires retraining, sufficient affected employees shall, at the discretion of the Employer, be retrained to operate this equipment where the Employer has reasonable grounds to believe that the employees have the capacity, experience, and educational qualifications to be able to operate fully the equipment after a reasonable training period; or
- 6.02b Where the employees, due to the introduction of automated equipment, are not retrained or do not satisfactorily complete retraining for any reason, the Employer agrees to meet with the affected employees to discuss practical ways and means of minimizing the adverse effect on these employees, including relocation, transfer, counselling, or other such measures as may be advisable.
- 6.03 An employee whose position is reclassified downward due to the introduction of automated equipment will, following such reclassification, receive the regular salary for their previous position for a period of two (2) months, and thereafter will continue to be paid at the same salary in their new position, except that where the salary exceeds the maximum for their new position, the maximum for the new position shall apply.

Article 7.0 – Hours of Work and Overtime

- 7.01 This paragraph is intended to define the normal hours of work for “Regular Full-Time Employee” and shall not be construed as a guarantee of hours of work per day or per week or of days of work per week. The normal work week for “Regular Full-Time Employee” shall consist of thirty-seven and one-half (37 1/2) hours for five (5) days at seven and one-half (7 1/2) hours each.
- 7.02 Overtime at the rate of time and one-half the employees’ hourly rate shall be paid for hours worked in excess of:
- 7.03 Seven and one-half (7 1/2) hours in any work day.
Thirty-seven and one-half (37 1/2) hours in any work week.
Overtime work will be performed by employees when required. The Employer will give reasonable consideration to personal reasons from employees for inability to work overtime.
- 7.04 To the extent that hours are compensated for at overtime rates under one provision, they shall not be considered as hours worked in determining overtime under the same or any other provision of this Agreement; i.e., there shall be no accumulation of lieu overtime credits.
- 7.05 The Employer undertakes that no employee shall be requested to work a split shift. All hours scheduled in a day shall be continuous with the exception of rest and meal periods. Any exception to the above shall be only by mutual agreement between the Employer and the employee.
- 7.06 Should an employee report for work on a regular scheduled basis, and there is no work available, they shall be paid a minimum of four (4) hours’ pay at their regular rate except in a case where work is not available because of fire or flood.
- 7.07 Where it is necessary to change an employee’s regular schedule of work, other than in an overtime situation, such change will be posted at least forty-eight (48) hours in advance. However, it is agreed that “Regular Part-Time” and “Part-Time Employees” may be asked to work extra shifts at the straight time rate without notice.

Appendix 3.3.4 (Continued)

- 7.08 Unless otherwise mutually agreed between the Union and the Employer, the normal lunch period shall be one (1) hour and shall be scheduled as near as possible to the midpoint of each shift as is practicable to branch operations.
- 7.09 Each employee shall be allowed a rest period of fifteen (15) minutes in each half day worked.
- 7.10a Any “Regular Full-Time Employee” called in to work on a shift other than her regularly scheduled shift, or called in more than three (3) hours prior to the commencement of her shift will receive one and one-half (1 1/2) times her regular rate of pay for such hours worked, or a minimum of four (4) hours pay at her regular straight time rate, whichever is greater.
- 7.10b When a “Regular Part-Time Employee” is called in to work on a day that is not on his/her regular scheduled shift, he/she shall be guaranteed four (4) hours of work at their straight time rate, or a minimum of four (4) hours pay at his/her straight time rate in lieu if such work is not available, provided, however, that such guarantee shall not apply if there is less than four (4) hours from the time the employee reports to work until the time the branch is closed.
- 7.11 It is not the intention of the Employer to utilize employees excluded from the bargaining unit for the sole purpose of limiting the availability of bargaining unit work.

Article 8.0 – Holidays

- 8.01 A “Regular Full-Time” or “Regular Part-Time” Employee’s regular salary will not be reduced because of the occurrence of the following holidays:
New Year’s Day, Good Friday, Victoria Day, Civic Holiday, Canada Day, Labour Day, Thanksgiving Day, Remembrance Day, Christmas Day, Boxing Day.
- 8.02 In order to qualify for maintenance of such regular salary, the employee must work his/her full regularly scheduled work days immediately preceding and following the holiday, except in the case of:
- a) authorized leave of absence granted by the Employer on either of these working days.
 - b) illness verified by a doctor’s certificate when requested by the Employer.
- 8.03 Employees who are off on long-term disability shall not receive holiday pay.
- 8.04 Should a recognized holiday occur during an employee’s leave of absence, he/she shall not be paid for such holiday.
- 8.05 An employee who qualified for his/her regular salary in respect of a holiday and who is required to work on the holiday will be paid at the rate of time and one-half his/her equivalent hourly rate in addition to his/her regular salary.
- 8.06 When a recognized holiday falls on a non-business day, the holiday shall be observed on the next regularly scheduled business day unless prohibited by law.
- 8.07 “Part-Time Employees” will be eligible for coverage under this Article only when they have worked 15 days during the 30 calendar days immediately preceding the date the holiday is observed.

Appendix 3.3.4 (Continued)

Article 9.0 – Vacations With Pay

- 9.01 Employees covered by this collective agreement are entitled to one vacation for every (12) months of service from the date of hire by the Upper Canada Bank. Employees may take their first anniversary year's vacation entitlement after (9) months service.
- 9.02 Full-time employees covered by this agreement shall be entitled to vacations on the following basis:

Vacation Entitlement	Length of Service
Two (2) weeks if taken entirely between May 1st and October 31st. Three (3) weeks if taken entirely between November 1st and April 30th.	After one (1) full year but less than (3) years.
Three (3) weeks.	After three (3) full years but less than five (5) years.
Three (3) weeks if taken entirely between May 1st and October 31st. Four (4) weeks if taken entirely between November 1st and April 30th.	After five (5) full years but less than ten (10) years.
Four (4) weeks.	After ten (10) full years but less than twenty-five (25) years.
Five (5) weeks.	After twenty-five (25) full years.

- 9.03 Employees shall be paid their regular rate of pay for their normal hours of work per day for the length of the vacation period, provided that the amount of vacation pay equals or exceeds the following percentages of all earnings during the year of employment:

Employee Vacation Entitlement	Minimum Vacation Pay
Two (2) weeks	4 per cent
Three (3) weeks	6 per cent
Four (4) weeks	8 per cent
Five (5) weeks	10 per cent

Vacation pay entitlements to terminating employees are to be based on their normal holiday entitlement between May 1st and October 31st. Upon termination, an employee shall be paid vacation pay then owing on the basis of the above-mentioned percentage of gross earnings in respect of any prior completed year of employment.

- 9.04 The Branch Manager shall prepare a holiday schedule for all employees in January of each year. This may be reviewed and updated as required until all vacations have been completed. Employees may divide their vacation into more than one period at the discretion of the Branch Manager or her designated representative and where operational requirements permit. In the normal course, this should be restricted to two periods. Each vacation period must not be less than one week.

Appendix 3.3.4 (Continued)

- 9.05 Vacations will, as far as practical, be granted at times most desired by employees, but the final decision to allot vacation periods and to change such allotments is exclusively reserved to the Branch Manager or designated representative in order to ensure the orderly and efficient operation of the branch and the maintenance of a work force sufficient to do the necessary work. Each year's vacation entitlement must be completed separately and may not be added to a subsequent year's entitlement. Intervals between vacations should not be less than nine (9) months and not more than fifteen (15) months. Where circumstances require the interval between vacation entitlements to exceed fifteen months, authorization must be obtained by the regional office.
- 9.06 Part-time employees covered by this collective agreement shall receive vacation entitlement equivalent to the full-time employees on a pro rata basis depending on the number of days per week which the employee regularly works.
- 9.07 In determining length of service for vacation purposes, service with the Upper Canada Bank prior to the present term of employment shall be included. Previous years of regular part-time service with the Upper Canada Bank shall be fully included, regardless of the number of days worked per week during the previous years of service. However, eight (8) full months' service must be completed in the bank during the present term of employment before vacation may be taken.

Article 10.0 – Employee Benefit Plans

- 10.01 The employer agrees for the duration of the collective agreement to continue to contribute the same amounts to the following benefit plans in effect on the date of the signing of the collective agreement, subject to continuing eligibility requirements and to the payment of the employee's contribution through payroll deduction:
1. Life Insurance Plan
 2. Medical Insurance Plan
 3. Accident Insurance plan
 4. Long-Term Disability Plan
 5. Survivors' Income Insurance Plan
 6. Pension Plan
 7. Dental Insurance Plan
 8. Canada Pension Plan
- 10.02 The employer will contribute 100% towards the cost of the monthly premiums for the Benefit Plan for eligible employees who elect to participate in the plan.
- 10.03 The employer will contribute 100% towards the cost of the monthly premiums in effect towards the coverage of each eligible employee who elects to be covered under the current group life insurance plan, for term insurance coverage in the following amount of \$50,000 for eligible employees who elect to participate in the plan.
- 10.04 The employer will contribute 100% towards the cost of the monthly premiums for the Accidental Death and Dismemberment Plan on the compulsory base plan of \$50,000 for eligible employees who elect to participate in the plan.
- 10.05 The employer will contribute 100% towards the cost of the monthly premiums for the Survivors' Income Insurance Plan on the compulsory base plan of \$10,000 in the event of the death of the spouse of the insured employee, and \$10,000 per child, for eligible employees who elect to participate in the plan.

Appendix 3.3.4 (Continued)

- 10.06 The employer will contribute 100% towards the cost of the monthly premiums for the Dental Insurance Plan for eligible employees who elect to participate in the plan.
- 10.07 The parties agree that all matters regarding the provisions of the policies of insurance shall be determined solely by the insurers and such determination shall not be the subject of a grievance.

Article 11.0 – Performance Appraisal

- 11.01 The employer in conjunction with the employees will plan, develop, and implement the Performance Appraisal System.
- 11.02 Employees under the collective agreement must be subject to four (4) performance appraisals a year. The employer reserves the right to set the dates for each performance appraisal.
- 11.03 The employee is to receive two (2) weeks notice before a performance appraisal is to take place.
- 11.04 The Self-Evaluation form below will be used during the lifetime the collective agreement.
- 11.05 The Performance Appraisal and Development Plan below will be used during the lifetime of the collective agreement.

Classified Staff Employee Self-Evaluation

Employee Name:

Department:

Title:

To:

Supervisor Name:

Period Rated:

From:

Type of Performance Appraisal: End of Probation Annual Other

Job Function Performance

How I believe I performed my essential job functions overall.

Accomplishments

Accomplishments and job functions that I believe I have handled well.

Areas for Improvement

Job performance areas where I think I could improve, or need help in.

Appendix 3.3.4 (Continued)

Goals and Objectives

These are goals and objectives that I would like to work on in the upcoming year.

Support

This is how I feel I develop best and the support that I feel would improve my job performance and professional development and help me to meet goals set for the upcoming year.

Professional Development

I have attended at least 16 hours of professional development training in the last 12 months.

Yes No If no, why?

Department

I have some suggestions for improving departmental effectiveness.

Performance Rating

Please check one of the boxes below for the level rating you feel you are at.

- Level 1 – Essential functions of position not fulfilled
- Level 2 – Essential functions of position fulfilled but needs improvement
- Level 3 – Essential functions of position fulfilled
- Level 4 – Essential functions of position exceeded
- Level 5 – Essential functions of position far exceeded

Please print self-appraisal and sign below:

Employee Signature _____ Date _____

Additional Requirements

- Send the original of this Self-Evaluation to Human Resources.
- Give a copy of this Self-Evaluation to your supervisor.
- Keep a copy of this Self-Evaluation for yourself.

Appendix 3.3.4 (Continued)

Performance Appraisal And Development Plan

Section I

Name of Service Professional	Employee ID Number	Date of Evaluation (Month/Day/Year)
Department	Job Title	From: To: Evaluation Period (Month/Day/Year)
Hire Date for this Position	Name of Evaluator	Title

The goals of this evaluation are to

- **Inform.** The supervisor and service professional communicate openly about performance.
- **Set Goals.** The supervisor and service professional mutually establish goals for progress.
- **Develop.** The supervisor and service professional identify actions the service professional can take to enhance professional development.
- **Evaluate.** The supervisor and service professional evaluate results based on previously established goals and performance standards.

(Attach additional pages if necessary to complete the sections below)

Section II – Job Responsibilities

MAJOR RESPONSIBILITIES OF THIS POSITION. Summarize specific responsibilities of the job

Appendix 3.3.4 (Continued)

Section III – Performance Factors And Evaluation

Please consider the service professional's demonstrated performance for each of the factors listed below, and cite examples of how that performance factor has or has not been met.

1. **WORK QUALITY/QUANTITY:** Able to produce thorough and accurate work in a timely manner, contributes to the achievement of the Upper Bank of Canada's mission, participates in the Upper Bank of Canada's service activities (committee, projects, etc.).

2. **DEPENDABILITY:** Confidence can be placed in the service professional to complete assigned tasks and meet deadlines (also applies to attendance and punctuality).

3. **JUDGEMENT:** Able to analyse problems and make well-reasoned, sound decisions.

4. **INITIATIVE/CREATIVITY:** Able to independently anticipate and act upon needs; demonstrates creativity in devising new and better methods.

Appendix 3.3.4 (Continued)

5. **COMMUNICATION SKILLS:** Able to organize and express thoughts clearly and concisely (both orally and in writing), able to listen, keeps supervisor informed of issues and trends.

6. **HUMAN RELATIONS SKILLS:** Able to work effectively with people from diverse social and cultural backgrounds, supports the Upper Bank of Canada's commitment to cultural diversity and affirmative action.

7. **ORGANIZATIONAL SKILLS:** Able to plan, organize, and prioritize workload to make best use of resources and efficiently carry out job responsibilities.

8. **SUPERVISORY SKILLS (if applicable):** Able to accept responsibility and delegate appropriate responsibility and authority to subordinates; provides for training, motivation, counselling, rewarding and discipline of subordinate staff; monitors and evaluates staff performance on a timely and objective basis.

Note: The supervisor is encouraged to attach additional performance factors, if appropriate.

Appendix 3.3.4 (Continued)

Evaluation Summary:

An overall rating is required - please check only one.

- Level 1 – Responsibilities of the position not fulfilled
- Level 2 – Responsibilities of the position mostly fulfilled but needs improvement
- Level 3 – Responsibilities of the position fulfilled
- Level 4 – Responsibilities of the position exceeded
- Level 5 – Responsibilities of the position exceeded in a sustained and outstanding manner

Section IV – Development Plan

PROFESSIONAL DEVELOPMENT: Identify the strengths and attributes that the service professional demonstrated in his or her performance this year. Identify improvements needed. How can the supervisor assist the service professional in enhancing job performance and/or career development?

GOALS AND OBJECTIVES: A) Summarize progress on goals and objectives for this evaluation period.

B) The supervisor should assist the service professional in establishing goals for professional and personal development. The goals should be attached to this form; they will become a basis for the next performance appraisal. How can the supervisor assist the service professional in meeting these goals?

Appendix 3.3.4 (Continued)

Section V – Employee Comments

EMPLOYEE COMMENTS: The individual being evaluated is encouraged to add any comments to this review.

I have seen and discussed this evaluation with my supervisor.

I wish to attach additional information.

I do not wish to attach additional information.

Service Professional's Signature _____ Date _____

Note: By signing this form, the employee acknowledges only that this appraisal was discussed and that a copy has been received. It does not necessarily signify that the employee concurs with the appraisal.

Section VI – Signatures

Evaluator's Signature _____

Signature of Evaluator's Supervisor _____

Evaluation accepted

Evaluation returned for the following reason(s):