

GSPP 847: Strategic Planning for Nonprofit & Public Organizations (Jan-Apr 2011)

	University of Regina Campus
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Office Hours:	By appointment
Office Location:	CK 115
Term:	Winter 2011
Room:	CL 417
Time:	Mondays 7:00 – 9:45 p.m.

COURSE CALENDAR DESCRIPTION

“Strategic and operational planning through discussion of the relevance of organizational values, development of mission and vision statements and techniques to align goals and objectives with organizational priorities. Financial capability analysis and budgetary role in planning will be addressed. Skills developed include critical thinking, problem solving, writing and presentation.”

1. COURSE OVERVIEW

There are three key dimensions to this course:

- a) students will be introduced to theoretical material about strategic planning;
- b) students will explore practical strategies and specific skills required to do strategic planning and achieve specific outcomes; and
- c) students will learn to critically assess structures, relationships, processes and the environment (e.g., political, social, economic, historical, ideological) within which strategic planning unfolds.

2. COURSE FORMAT AND THE LEARNING PROCESS

The class will meet once each week for three hours. Each week students will be assigned readings which must be read before the class. Each class will be a mix of analysing the readings, exploring practical examples as well as case studies and doing personal reflection exercises and small discussion groups. This class is intended to be participatory with both large group and smaller group discussions occurring weekly. Given strategic planning requires individual, small group and large group work, these will be reflected in class learning activities.

It is noteworthy that 50% of students' learning will occur through readings and powerpoints made available on UR Courses, but the other 50% will occur through in-class group discussions. Past student evaluations of similar courses indicated one of the most impactful parts of the course were the in-class deliberations.

A number of guest speakers will be invited to our class to share their experiences. The dates of these will be co-ordinated with our course topics and the speakers' schedules. I will endeavour to give students a few weeks advance notice of these guest speakers' presentations.

In order to facilitate the learning process,

- I encourage critical thinking. All theories, ideologies, policies and individual opinions are debatable. However, the debates must take place within an environment of respect.
- I believe that students will read the assigned material and come prepared to engage each other in healthy discussion. Class participation is required and graded.
- I believe students will take responsibility for asking questions when clarification is required and for altering the pace of the course to suit their needs.
- I believe that my role and student roles will shift each week depending on what we are doing. For example, everyone (hopefully) will move in and out of the following roles: discussion group leader, observer, resource person, facilitator, lecturer & commentator.
- I expect students to bring to class any relevant and interesting material they may find, which support or contradict class discussions.
- I expect students will give their full attention during class; cell phones are turned off and laptops will be used for class content only.
- I will probably use "exit note cards" at the end of each class to track students' unanswered questions and ongoing issues.

In order to maximize student learning, I am very interested in your feedback on the pace and content of the course at any time; do not hesitate to raise concerns with me immediately (e.g., before class, after class, etc.). If you or a group of you have concerns, please speak to me ASAP. Please note that I usually ask students to do mid-term, course evaluations; this anonymous feedback gives me the chance to alter my teaching approach, pace and content if significant concerns are raised by students. You are not expected to wait for a course evaluation to offer feedback – that's too late to support your learning!

3. INTENDED COURSE IMPACTS ON STUDENTS

This course is designed for those interested in playing leadership roles in organizations.

Expected student learning outcomes by the end of the course include, students:

- a) will understand a variety of concepts pertaining to strategic planning and how they differ from other models and concepts;
- b) will be able to design strategic planning processes in order to move toward identified organizational goals;
- c) will become more aware that strategic planning is inherently value-based;
- d) will understand the multi-layered environment of strategic planning and the interconnectedness of various systems which can operate for or against one's planning work; and
- e) will understand that good strategic planning comprises a healthy mix of science, art and intuition.

4. REQUIRED READING

Available at university bookstore for purchase

Bryson, J. 2004. *Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement*. San Francisco: Jossey-Bass.

Bryson, J. and F. Alston 2005. *Creating and Implementing your Strategic Plan: A Workbook for Public and Nonprofit Organizations*. San Francisco: Jossey-Bass.

Nolan, T., L. Goodstein, and W. Pfeiffer. 1993. *Plan or Die! Ten keys to organizational success*. San Francisco: Pfeiffer.

Available at reserve reading desk at university library – only certain sections are required reading

Mintzberg, H. 1994. *The Rise and Fall of Strategic Planning*. New York: The Free Press.

Mintzberg, H., B. Ahlstrand, and J. Lampel. 1998. *Safari Strategy: A Guided Tour through the Wilds of Strategic Management*. New York: Free Press.

Some additional material will be distributed via UR Courses including e-journals and links to government websites (City of Regina strategic plan, Ministry of Social Services website, Public Health Agency of Canada).

Refer to UR Courses for additional required reading and other weekly material.
Students will be alerted to time sensitive material via an email message.

5. REQUIRED ASSIGNMENTS

An overview of the assignments is presented here. All assignments are to be submitted electronically via email (not UR Courses) as a MSWord document, 1.5 or double spaced, no smaller than size 11 Arial font or size 12 Times Roman font. I will notify you within 24 hours of receiving your assignment; if you do not receive a reply from me then assume I did not receive it ... and please contact me again via email. Chicago Style for citations and references should be followed; refer to the GSPP website for more information. Papers will be returned with a mark and comments in the margins using “track changes”. Students are encouraged to make appointments with me to discuss their assignments in advance of their work on them.

Assignments are due at the beginning of class on the specified date. Consequently, a late project is defined as one that is handed in after 7:00 pm the day it is due. Late assignments will be penalized at a rate of 50% per day and will only be accepted up to and including two calendar days after the due date (still due by 7:00). **All assignment deadlines are firm unless there are documented medical reasons.** Assignments are expected to be completed outside class time and no Wikipedia references are permitted. More details on each of these will be made available during the first month of class.

Depending on the assignment, grading may be done by a combination of self assessment, peer assessment, and instructor assessment.

The following assignments are mandatory for each student:

- a) **Class participation (15%), written self-assessment due Apr. 4** – Participation in class is a requirement. The purpose of class participation is twofold: to encourage students to question, develop clarity around complex issues and apply their own ideas; and strategic planning is a group process thus this is a good opportunity to practice. Students will be assessed on attendance (e.g., how many classes attended), preparation, participation, etc; there will be a self-evaluation component to this.
- b) **Discovery exercise (25%), written part due Feb. 7, max. 10 pages, excluding references and appendices** – find, describe and critique a strategic plan and then present it to the class. This is the only assignment to be done in pairs. Students are to find a strategic plan for a nonprofit or public organization and then describe and critique it using the course texts (more details will follow).

There are two major components to this assignment:

i) a written document worth 10% (10 pages max., to be submitted Feb. 7)

ii) a presentation to be done near the end of the term worth 15% (30 minutes max. which should include a 10 minute presentation and a 20 minute discussion period). These presentations offer students the opportunity to see the diversity of strategic planning issues and to develop new insights before finalizing term papers. Students are expected to pose key questions to the class. The power point slides are to be submitted and will be graded in conjunction with the presentation.

- c) **Strategic plan blueprint (20%), due Feb. 28, max. 10 pages, excluding references and appendices** – Students are to research and choose an organization for whom they will develop a strategic plan blueprint. This blueprint is an annotated outline of the key elements of a plan including rationale for each element and explanation of the processes.
- d) **Final strategic plan (40%), due Apr. 8, max. 20 pages, excluding references and appendices** – Students are expected to construct a strategic plan for the organization they chose at the beginning of the term and for which they submitted a blueprint. Major elements covered through the readings and discussed in class should be incorporated into the plan along with a rationale where appropriate. The final submission should also incorporate feedback collected during the class presentations.

6. OVERVIEW OF CLASS SCHEDULE

Week of	Content/Focus	Readings to be completed before class (there will be some additional readings suggested via UR Courses)
Jan. 10	Introductions. Course requirements and Q & A. Introduction to strategic planning; what is/is not strategic planning; what are science, art, intuition & risk-taking for strategic planning; what is the 'future'?	Bryson 2004; Ch. 1, p. 3-29 Ch. 2, p. 30-62 Nolan et al. Ch. 1, p. 1-27
Jan. 17	Strategic planning models – all about squirrels and other such animals	Mintzberg et al 1998; Ch. 1, p. 1-21 Ch. 12, p. 349-73
Jan. 24	Challenges, pitfalls and contradictions in strategic planning. Real-time planning in a rapidly changing world.	Mintzberg 1994; Ch. 4, p. 159-220 Ch. 5, p. 221-321 Nolan et al 1993; Ch. 3, p. 55-84 Ch. 4, p. 85-114
Jan. 31	Organizational culture, values, mission and vision. Who are we, where are we going, who's with us & how deep is the commitment?	Bryson 2004; Ch. 3, p. 65-93 Ch. 4, p. 94-122 Bryson & Alston 2005; Steps 1-3, p.37-76
Feb. 7	Environmental scanning and SWOT. The environment is not that complex is it? <i>Students to evaluate/offer feedback (anonymously) to Gloria re course</i>	Bryson 2004; Ch. 5, p. 123-152 Bryson & Alston 2005; Step 4, p.77-84 Re-visit Nolan et al 1993; Ch. 1, p. 2-27
Feb. 14	Thinking about mission and objectives ...identify strategic issues.	Bryson 2004; Ch. 6, p. 153-182 Bryson & Alston 2005; Steps 5, p. 85-96
Feb. 21	READING WEEK – NO CLASS	☺
Feb. 28	Strategy formation and adoption. Writing and rewriting a strategy using science, art and intuition. Visioning for the future.	Bryson 2004; Ch. 7, p. 183-223 Ch. 8, p. 224-237 Bryson & Alston 2005; Steps 6-8, p. 97-120
Mar. 7	Resource allocation – staff and volunteer skill base, money, time, technology The many roles played by planners.	"Resource allocation" readings to be posted on UR Courses. For "roles" see Bryson 2004; Ch. 11, p. 297-316 (for additional reading see Mintzberg 1994, p. 351-393)
Mar. 14	Implementation – don't we simply roll-out the plan and everything falls into place? Ummm, no!	Bryson 2004; Ch. 9, p. 238-263 Bryson & Alston 2005; Step 9, p. 121-8
Mar. 21	Evaluating, reassessing, revising – direct impacts, ripple effects, accountability	Bryson 2004; Ch. 10, p. 264-294 Bryson & Alston 2005; Step 10, p. 129-134
Mar. 28	Student presentations	
Apr. 4		
Apr. 8	Final strategic plans due by 7:00 p.m. on Apr. 8 th	

7. SOME IMPORTANT UNIVERSITY REGULATIONS: A SUMMARY

a) Copyright issues in 2011

Please familiarize yourself with the University of Regina's new copyright policies and procedures because you will undoubtedly be using text and video material to do your research and to share in class. Refer to <http://www.uregina.ca/library/research/copyright.shtml>.

b) Academic integrity and conduct

Ensuring that you understand and follow the principles of academic integrity and conduct as laid out in the University of Regina's Graduate Calendar and the University of Saskatchewan's Guidelines for Academic Conduct is vital to your success in graduate school. Ensuring that your work is your own and reflects both your own ideas and those of others incorporated in your work is important: ensuring that you acknowledge the ideas, words, and phrases of others that you use is a vital part of the scholarly endeavour. Students are expected to be familiar with the Chicago style and conventions; claiming that 'you didn't know' or that it was not intentional are not acceptable excuses. If you have any questions at all about academic integrity in general or about specific issues, please check the universities' websites, the MPA Student Handbook and contact me to discuss your questions.

Unless otherwise stated, it is expected that student submit their own work and work independently on assignments.

c) Harassment

All members of the University community are entitled to a professional and working learning environment free of harassment and discrimination. This entitlement, however, carries with it the expectation that all members of the University community will conduct themselves in an appropriate and responsible manner, with due respect and regard for the rights of others. No member of the university community shall cause or participate in discrimination against or harassment of another person.

d) Writing, grammar, spelling, etc.

Instructors expect competence in writing skills from students. Consequently, students are strongly encouraged to proofread their assignments before handing them in. I reserve the right to return an assignment to a student(s) for re-writing if sentence structure, voice, vocabulary, spelling and paragraph logic make it impossible for me to mark. Late penalties will then be applied.

e) Special needs

The Universities wish to effectively assist all students in achieving their academic goals, including students with disabilities. The Universities aim to provide services that will enable students with disabilities to approach their studies with minimum difficulty.

Students, who are registered with the Disability Resource Office and are requesting accommodations, should make an appointment to discuss these accommodations with the instructor as soon as possible.

Students not registered with the Disability Resource Office, who because of a disability may have a need for accommodation(s), should contact the coordinator of the Disabilities Resource Office at 585-4631, University of Regina.

f) Group work

If there are group assignments, all students are expected to participate fully on their group's assignment. Each group member will be given the chance to evaluate the contributions of other group members at the end of the term. Unless a consultation is held with all the group members and the instructor at the beginning of the term wherein an agreement regarding contribution is reached, group members who fail to contribute equally to the group product shall have their marks adjusted accordingly. If the group deems that an individual did not contribute at all or minimally, the student shall receive a grade of zero for that group assignment.

g) Other regulations

Please refer to the Universities' Graduate Calendars and the MPA Student Handbook for a full description of academic regulations. If you have any questions or concerns about any of the regulations, please discuss them with the instructor.