

School of Planning, Public Policy and Management



PPPM 426/526 – Strategic Planning

Class CRNs 36947, 34668

Class Syllabus – Spring 2021

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|------------------------|---|
| Instructor | Bob Choquette |
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| Phone | 541.346.3851 |
| Office Hours and URL | Mondays 1-2 pm and Wednesdays 9-10 am: http://bit.ly/SP2021OH |
| Course URL | http://bit.ly/SP2021SP |
| Meeting Dates and Time | Mondays and Wednesdays: 2:15-3:45 pm |

Course Description

Leaders and managers of governments, nonprofit organizations, and communities face numerous and difficult challenges. Any organization that want to survive, prosper, and do good and important work must respond to the challenges the world presents.

Strategic planning may be thought of as a “way of knowing” intended to help leaders and managers discern what to do, how, and why (Bryson, Crosby, & Bryson, 2009). Strategic planning can help leaders and managers successfully address the major issues or challenges facing an organization that are not amenable to simple technical fixes.

Strategic planning is an organizational management activity to set priorities, focus energy and resources, strengthen operations, ensure that employees and other stakeholders are working toward common goals, establish agreement around intended outcomes/results, and assess and adjust the organization's direction in response to a changing environment. Effective strategic planning articulates not only where an organization is going and the actions needed to make progress, but also how it will know if it is successful.

Students in this class will spend time in class learning about the theory and intricacies of strategic planning, and spend time outside of class working in teams with a local nonprofit organization to develop a strategic plan to help their leaders address the major issues they are facing.

Learning Outcomes

Upon successful completion of this course, students will:

1. Understand the theory of strategic planning through class readings and discussions.
2. Be able to apply theory to practice by developing a strategic plan for a local organization.
3. Enhance teamwork skills developed through the strategic plan development process.
4. Develop their research and presentation skills by presenting the results of self-directed research on a related topic in class and by presenting their strategic plan to their client group.
5. Reflect on their learning through regular reflective writing assignments.

Teaching Philosophy

I subscribe to three models of learning that guide my classroom instruction:

- *Constructivism* (Duffy and Jonassen, 1992) posits that people construct their own understanding and knowledge of the world by experiencing things and reflecting on those experiences. New knowledge builds upon our previous ideas and experience. Ideally, learning happens in collaboration with others.
- *Experiential learning* (Kolb, 1984) supports students in applying the knowledge and conceptual understanding gained in the classroom to real-world problems or situations. Experience (including mistakes) provides the basis for the learning activities. Adults are most interested in learning that has immediate relevance and impact to their career or personal life, and their learning is problem-centered rather than content-oriented.
- *Relational-cultural theory* (Miller, 1976) proposes that successful relational connections—interactions that are mutually empathic and mutually empowering—are vital to individual and shared learning, as well as emotional growth and health (Miller & Stiver, 1997). RCT's key tenets are trust, mutual empathy, and growth-in-connection, which is essentially the

enhanced ability to learn and progress through healthy, growth-fostering relationships.

Textbooks and Course Materials

Bryson, John M. *Strategic Planning for Public and Nonprofit Organizations* (Fifth Edition), Jossey-Bass Publishers (2018). Online access available through the UO Library. OPTIONAL

Bryson, John M., Fran Ackerman, and Colin Eden. *Visual Strategy: Strategic Mapping for Public and Nonprofit Organizations*, Jossey-Bass Publishers (2014). Online access available through the UO Library. OPTIONAL

Additional readings available at <http://canvas.uoregon.edu> . REQUIRED

Grading

This class is offered on either a graded or pass/no pass basis. Your grade will be determined based on the following:

| | | 426 | 526 |
|---|-------------------------------|-------------|-------------|
| 1 | Strategic planning activities | 45% | 45% |
| 2 | Team member evaluations | 15% | 15% |
| 3 | Graduate presentation | - | 10% |
| 4 | Reflective assignments | 40% | 30% |
| | TOTAL | 100% | 100% |

Due to the complicated nature of grading this course (e.g., mix of team and individual assignments, assignments with different weights depending on student status), cumulative grades shown in Canvas may not be accurate.

Course Structure

We will spend each class session in a variety of formats. There will be some lecture, lots of discussion (both small group and whole class), student presentations, work sessions, guest speakers, and some activities.

Course Website

The course website is located on the University's Canvas system (<https://canvas.uoregon.edu>). The class syllabus, announcements, and other materials will be posted on the Canvas site. Please check the course website

frequently for updates. In addition, make sure that the UO Registrar has your correct email address. I will use this email address to communicate with you.

Accessibility

The University of Oregon is working to create inclusive learning environments. Please notify me if there are aspects of the instruction or design of this course that result in disability-related barriers to your participation. You are also encouraged to contact the Accessible Education Center (formerly Disability Services) in 164 Oregon Hall at 541.346.1155 or uoaec@uoregon.edu.

Diversity

The University of Oregon values our diversity and seeks to foster equity and inclusion in a welcoming, safe, and respectful community. This course is committed to upholding this principle by encouraging the exploration, engagement, and expression of different perspectives and diverse identities. I will value each class member's experiences and contributions, and communicate disagreements respectfully. Please notify me if you feel aspects of the course undermine these principles. For additional resources, you are also encouraged to contact the following campus services:

- Division of Equity and Inclusion: 1 Johnson Hall or 541.346.3175 or <http://inclusion.uoregon.edu/>
- Center on Diversity and Community: 54 Susan Campbell Hall or 541.346.3212 or <http://codac.uoregon.edu/>
- Bias Response Team: 164 Oregon Hall or brt@uoregon.edu or <http://bias.uoregon.edu>

Statement Regarding Title IX and a Safe Learning Environment Free from Discrimination and Harassment

The UO is committed to providing an environment free of all forms of discrimination, harassment, and assault. This includes conduct that unreasonably discriminates among individuals on the basis of race, color, gender, national origin, ethnicity, age, religion, marital status, disability, veteran status, sexual orientation, gender identity, or gender expression. It also includes sexual and physical assault, domestic and dating violence, and gender based stalking. We support Title IX.

If you, or someone you know, has experienced or experiences harassment or discrimination that is sufficiently severe or pervasive that it interferes with work

or academic performance—or if you have experienced sexual or physical assault in any form—the UO has staff members trained to support and make sure you are aware of the range of options available to you and have access to the resources you need. You may choose whether or not to access these resources.

Students wishing to pursue a complaint involving discrimination or harassment should contact the Office of Affirmative Action & Equal Opportunity at 541.346.3123 or <http://aaeo.uoregon.edu>. If you wish to speak to someone confidentially regarding sexual assault or harassment, call 541.346.SAFE, UO's 24-hour hotline, or visit the SAFE website, <http://safe.uoregon.edu>. The University Health Center and University Counseling and Testing Center can provide assistance and work confidentially with students.

Inclusion Statement

The College of Design is a community that values inclusion. We are committed to equal opportunities for all faculty, staff and students to develop individually, professionally, and academically regardless of ethnicity, heritage, gender, sexual orientation, ability, socio-economic standing, cultural beliefs and traditions. We are dedicated to an environment that is inclusive and fosters awareness, understanding, and respect for diversity. If you feel excluded or threatened, please contact your instructor and/or the school head.

Center for Multicultural Academic Excellence

The CMAE is a place where students are empowered, engaged, and nurtured for success. Their vision is to build and empower an inclusive and diverse community of scholars who exemplify academic excellence and inspire positive change. CMAE's mission is to promote student retention and persistence for historically underrepresented and underserved populations. They develop and implement programs and services that support retention, academic excellence, and success at the UO and beyond. Call 541.346.3479, email cmoe@uoregon.edu, or visit Suites 164 and 165 in Oregon Hall.

Mental Health

As a student, you may experience a range of issues that can cause barriers to learning, such as strained relationships, increased anxiety, alcohol/drug problems, feeling down, difficulty concentrating and/or lack of motivation. These mental health concerns or stressful events may impact your academic performance or reduce your ability to participate in daily activities. The University of Oregon is committed to advancing the mental health and well-

being of its students. If you or someone you know is feeling overwhelmed, depressed, and/or in need of support, services are available. You can learn more about the broad range of confidential mental health services available on campus via <https://health.uoregon.edu/mental-health> or by calling 541.346.2770.

Life's Challenges

Any student who has difficulty affording groceries or accessing sufficient food to eat every day, or who lacks a safe and stable place to live, and believes this may affect their performance in school, is urged to contact the Dean of Students for support. Furthermore, please let me know as well if you are comfortable in doing so. This will enable me to provide any resources that I have access to. **I care about you as an individual and your health and well-being beyond your role as a student in this class.**

Incomplete Policy

Students are expected to behave in a professional manner and to turn in all materials at the designated time. In accordance with university regulations, an incomplete will only be given when “the quality of work is satisfactory but a minor yet essential requirement of the course has not been completed for reasons acceptable to the instructor.”

Academic Misconduct

You are expected at all times to do your own work. Copying content from other students and submitting it as your own work is grounds for failing the class. The University Student Conduct Code (available at <http://dos.uoregon.edu/social-misconduct>) defines academic misconduct. Students are prohibited from committing or attempting to commit any act that constitutes academic misconduct. By way of example, students should not give or receive (or attempt to give or receive) unauthorized help on assignments or examinations without express permission from the instructor.

Plagiarism

Students should properly acknowledge and document all sources of information (e.g. quotations, paraphrases, ideas) and use only the sources and resources authorized by the instructor. If there is any question about whether an act constitutes academic misconduct, it is the students' obligation to clarify the

question with the instructor before committing or attempting to commit the act. Additional information about a common form of academic misconduct, plagiarism, is available at <http://researchguides.uoregon.edu/citing-plagiarism>.

Assignments

Strategic Planning Activities

The class will be working with several local organizations this term to develop a strategic plan. In teams of 3, students will conduct the research required to develop a strategic plan (or a portion of a plan) for their client. The activities required to complete a plan include:

1. Conducting one or more site visits to the client organization (Site Visit Report due April 25)
2. Conducting in-person or telephone SWOT interviews (Final Report - SWOTs due May 16)
3. Conducting additional library, telephone, or web-based research (Final Report - Research due May 23)
4. Developing a draft strategic plan for client review (Final Report - Outline due May 2; Final Report – Chapter 1 due May 9; Final Report – Strategic Plan due May 23; Final Report – Draft Complete due to client and Bob by May 30)
5. Incorporating client and instructor edits into a final strategic plan
6. Presenting your strategic plan both in class (June 10) and to your client group (at a mutually agreed upon time and location)

Report from Site Visit

Each team will visit their organizational partner's site and meet with their client several times during the term. A one-page summary of the first visit should be posted on Canvas by April 25 (one per team).

Background Chapter

The first chapter of your strategic plan should include the following elements:

- Purpose of the report
- Organizational background (including history, mission, structure, and programs)
- Methodology

A complete draft of the first chapter of your strategic plan report should be posted on Canvas by May 9 (one per team).

SWOT Analyses

Each organization will provide their student team with contact information for approximately 25 people. The team will make every effort to complete 20 SWOT analyses either face-to-face, on the telephone, or via Zoom/Skype. A summary of the results of the SWOT analyses (ordered bullet lists for each category) should be posted on Canvas by May 16 (one per team).

Research Update

Each organization will provide their student team with a research topic. This topic must be discussed with Bob to ensure it is compatible with your team's skill sets and can be completed within the time limits of this class. Each team will post a one-page summary of their research findings to date on Canvas by May 23 (one per team).

Team Member Evaluations

Starting the second week, you will work with several classmates to create an organization's strategic plan. To ensure the best possible result, it is important that every team member contribute his or her unique skills and abilities to the effort. You will provide feedback on each of your teammate's efforts and contributions twice during the term (week 6 and finals week). The feedback you receive will help you to learn more about how others perceived you in a group setting. The ability to work successfully in a team setting is important if you hope to succeed in your chosen field.

Graduate Presentation (*Graduate students only*)

Each team will be assigned a research topic by their client. Near the end of the term, each graduate student will make a presentation to the class on their teams' topic. Depending on the scope of the client research, presenters may be expected to supplement the research they conduct for their client with additional research. Graduate students will meet with Bob in the middle of the term to discuss presentation expectations.

Reflective Assignment

Weekly Reflections

The process of writing transforms our cognitive abilities because it forces us to process the contents of our working memory through the external manipulation of written sentences and words (Menary, 2007). In this class, you will reflect on your learning on a regular basis.

The weekly reflections are a way to capture your learning while it's happening, and give you an added perspective on your progress throughout the term. The purpose is to have you think about your learning, **not** summarize the week's

activities. Each week you'll be expected to write about 1-1½ pages (500-750 words) on your thoughts about what you're learning. Here are possible reflection topics:

1. Reflect on your early impressions of the class and the organizations we'll be working with.
2. What were your impressions from your site visit, and how did it confirm or refute what you already knew about the organization?
3. How do the readings to date impact / apply to your learning and activities with your nonprofit?
4. Reflect on your reaction to several of the week's readings.
5. What are the strengths and weaknesses of SWOT analyses as a data collection tool?
6. Discuss your growth in knowledge / comfort / expertise around SP for your organization.
7. Reflect on your team experience to date.
8. Reflect on an organization you know well, and how you might design and implement a SP process for them
9. Compare what you're doing with your nonprofit to the Bryson model.
10. Discuss the strengths / weaknesses of your organization having a consultant (you) do their SP as opposed to doing it in-house.

These are *suggested* topics. You may post your reflection on an alternate topic if you'd like, or reflect on topics in a different order than is presented here.

You must post a reflection weekly on Canvas by Sunday night at the end of weeks 2-9.

Expectations

Local nonprofit organizations are providing you with an excellent opportunity to learn how to create a strategic plan by working directly with them and their stakeholders. To ensure the success of this process and class, it's important that we all be clear about expectations.

What You Can Expect of Me

1. I will be available to help / guide / assist you and your team when you ask.
2. I will respond to your emails and/or requests for help in a timely manner – always within 24 hours, and generally within a few hours.

3. I will guide you and your team through the process of creating a strategic plan that you, your team, and your client can all be proud of.

What I Expect of You

1. You will do your best quality work.
2. You will meet the deadlines we have set for each of the project elements, and you will not procrastinate. You can do last-minute work of marginal quality when you're working alone, but in this class, that's **not acceptable**. You have your teammates, your client, and me counting on you.

Schedule

The following schedule may be adjusted as we move through the term, depending on student's interests, and the length of time we discuss particular issues, and the fluid nature of the strategic planning process.

| Week | Day | Date | Topic | In-Class Activities | Assignments / Outside Class Activities |
|------|-----|------|------------------------------------|---|--|
| 1 | Mon | 3/29 | Introduction to the Class | Review and discuss syllabus Lecture: What is Strategic Planning (part 1)? | |
| | Wed | 3/31 | Clients Visit Class | Representatives from the teams we will work with will present to the class | |
| 2 | Mon | 4/5 | Team Assignments SP details | Teams will meet for the first time Lecture: What is Strategic Planning (part 1)? | <i>Teams schedule site visits</i> |
| | Wed | 4/7 | Preparing For Site Visits | Lecture: What is Strategic Planning (part 2)? We will develop questions in preparation for site visits | Reflection 1 due (Sun) |
| 3 | Mon | 4/12 | Interviewing | We will discuss how to conduct SWOT interviews | <i>Teams conduct site visits this week</i> |

| Week | Day | Date | Topic | In-Class Activities | Assignments / Outside Class Activities |
|-------------|------------|-------------|--|---|---|
| | | Wed 4/14 | Final Report Outlines | We will develop the outline for each team's final report | <i>Teams begin SWOT interviews</i> Reflection 2 due (Sun) |
| 4 | Mon | 4/19 | Guest speaker Mariah Acton | Mariah will discuss facilitation techniques to support your client engagement | <i>SWOTs continue this week</i> |
| | | Wed 4/21 | Subject Matter Expert (SME) presentation | Teams will present information about client organizations and their nonprofit sector | Reflection 3 due (Sun) Submit site visit report (Sun) |
| 5 | Mon | 4/26 | Client Organizations Presentation (part 1) | Teams will share what they've learned to date about their client organizations Team progress meetings with Bob | <i>SWOTs continue this week</i> |
| | | Wed 4/28 | Client Organizations Presentation (part 2) | Teams will share what they've learned to date about their client organizations Team progress meetings with Bob | Reflection 4 due (Sun) Submit final report - outline (Sun) |
| 6 | Mon | 5/3 | Guest speaker Mariah Acton | Mariah will discuss techniques to use with your clients to share your findings | <i>SWOTs wrapped up this week</i> <i>Schedule meeting to discuss SWOTs</i> |

| Week | Day | Date | Topic | In-Class Activities | Assignments / Outside Class Activities |
|------|-----|------|---------------------------------------|--|--|
| | Wed | 5/5 | Coding Qualitative Data | We will discuss how to code the results of your SWOT interviews | Reflection 5 due (Sun) Submit final report - Chapter 1 (Sun) Team member evaluation 1 due (Sun) |
| 7 | Mon | 5/10 | Identify Strategic Issues | We will discuss how to identify the strategic issues based on the information you've collected | <i>Meet with client to discuss SWOT findings this week</i> |
| | Wed | 5/12 | Formulating Strategies | We'll discuss how to develop strategies to address the strategic issues | Reflection 6 due (Sun) Submit final report - SWOTs (Sun) |
| 8 | Mon | 5/17 | Sharing Information Among Teams | | <i>Schedule final presentation with client for week 10 or later</i> |
| | Wed | 5/19 | | | Reflection 7 due (Sun) Submit final report - strategic plan (Sun) Submit final report - research (Sun) |
| 9 | Mon | 5/24 | Work session | Teams meet during class time | |
| | Wed | 5/26 | Preparing for your final presentation | We will discuss how to prepare for your final client presentation | Reflection 8 due (Sun) Submit Final Report – Draft Complete to Bob and client (Sun) |
| 10 | Mon | 5/31 | <i>No class – Memorial Day</i> | | |

| Week | Day | Date | Topic | In-Class Activities | Assignments / Outside Class Activities |
|-------------|------------|-------------|----------------------------------|---|--|
| | Wed | 6/ 2 | Presentations / Class Evaluation | Graduate Research Presentations | Team member evaluation 2 due (Sun) |
| | Thursday, | June 10 | Final Plan Presentations | Each team will present their plans to the class | <i>Teams make final presentations to their clients</i> <i>Teams submit final plans to clients and Bob</i> |