Instructor: Bob Choquette  
E-Mail: choquett@uoregon.edu  
Phone: 541.346.3851  
Office Location and Hours: 102 Hendricks – drop by 10-4, or by appointment  
Course Location: 107 Esslinger  
Meeting Dates and Time: Mondays & Wednesdays – 2:00-3:20pm

Course Description

This class focuses on the theory and practice of strategic planning and strategic management in public sector and nonprofit agencies. The course will cover various approaches to designing and conducting strategic planning processes, including specific techniques for conducting SWOT analyses, strategic issue identification, strategy formulation, and plan development.

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. Have enhanced teamwork skills developed through the strategic plan development process.
4. Have enhanced 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. Have reflected on their learning through regular reflective writing assignments.

Teaching Philosophy

I subscribe to two models of learning that guide my classroom instruction. The first, constructivism (Duffy and Jonassen, 1992), believes 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.

The second model, 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.

**Textbooks**


Additional readings available at [http://canvas.uoregon.edu](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:

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<thead>
<tr>
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<th>426</th>
<th>526</th>
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<tbody>
<tr>
<td>1. Attendance and participation</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>2. Strategic planning activities</td>
<td>45%</td>
<td>45%</td>
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<tr>
<td>3. Team member evaluations</td>
<td>20%</td>
<td>15%</td>
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<tr>
<td>4. Graduate presentation</td>
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<td>10%</td>
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<td>5. Reflective assignments</td>
<td>25%</td>
<td>20%</td>
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<td><strong>TOTAL</strong></td>
<td>100%</td>
<td>100%</td>
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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 Website**

The course website is located on the University’s Canvas system ([https://canvas.uoregon.edu](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. We will use this email address to communicate with you.
Disabilities

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.

Inclusion Statement

The School of Architecture and Allied Arts 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 department head.

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. We 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

Title IX and a Safe Learning Environment

I support Title IX and have a duty to report relevant information. The UO is committed to providing an environment free of all forms of prohibited discrimination and sexual harassment, including sexual assault, domestic and dating violence and gender-based stalking. Any UO employee who becomes aware that such behavior is occurring has a duty to report that information to their supervisor or the Office of Affirmative Action and Equal Opportunity.

The University Health Center and University Counseling and Testing Center can provide assistance and they have a greater ability to work confidentially with students.
Center for Multicultural Academic Excellence

The CMAE is a place where students are empowered, engaged, and nurtured for success. Our 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. We develop and implement programs and services that support retention, academic excellence, and success at the UO and beyond. Call 541.346.3479, email cmae@uoregon.edu, or visit Suites 164 and 165 in Oregon Hall.

Late Assignment Policy

If you are unable to make it to class on the day an assignment is due, you may post to Canvas or email your assignment to the instructor prior to the class time and date that assignment is due. Late assignments may receive only partial credit. If an answer key is posted to the website, however, no late homework assignments are accepted (no credit).

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 conduct.uoregon.edu) 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://libweb.uoregon.edu/guides/plagiarism/students
Assignments

Attendance and Participation
You registered for this class because you were interested in learning more about strategic planning, so the best way to accomplish that goal is to attend class and engage with the material. I will expect you to attend each class. If you can’t attend class, you should coordinate with your classmates to ensure you get any pertinent notes. You can have one unexcused absence before it affects your grade in this class.

You will also be expected to participate in class discussions by asking questions and engaging in the ensuing discussions.

Strategic Planning Activities
The class will be working with several local organizations this term to develop a strategic plans. In teams of 2-3, 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 this activity will include:

1. Conducting one or more site visits to the client organization (Site Visit Report due April 30)
2. Conducting in-person, telephone, or online interviews (Final Report - SWOTs due May 21)
3. Conducting additional library, telephone, or web-based research (Final Report - Research due May 28)
4. Developing a draft strategic plan for client review (Final Report - Outline due May 7; Final Report – Chapter 1 due May 14; Final Report – Strategic Plan due May 28; Draft Final Report due to client and Bob by June 4)
5. Incorporating client and instructor edits into a final strategic plan
6. Presenting your strategic plan both in class (June 14) 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 30 (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 14 (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, via telephone, or via online survey. A summary of the results of the SWOT analyses (ordered bullet lists for each category) should be posted on Canvas by May 21 (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 28 (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 the reflection topics:

1. Topic of your choosing or reflection on your early impressions of the class and the organizations we’ll be working with.
2. How do the readings to date impact / apply to your learning and activities with your nonprofit?
3. What were your impressions for your site visit, and how did it confirm or refute what you already knew about the organization?
4. What are the strengths and weaknesses of SWOT analyses as a data collection tool?
5. Discuss your growth in knowledge / comfort / expertise around SP for your organization.
6. Reflect on your team experience to date.
7. How do the readings impact / apply to your learning and activities with your nonprofit?
8. Compare what you’re doing with your nonprofit to the Bryson model.

Possible additional topics:

1. Discuss the strengths / weaknesses of your organization having a consultant (you) do their SP as opposed to doing it in-house.
2. Your reflection on your team experience to date.

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 for weeks 2-9.

Your reflections are due at the end of each week on Sunday night, and are to be posted on Canvas.

**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.
<table>
<thead>
<tr>
<th>WEEK</th>
<th>DAY</th>
<th>DATE</th>
<th>TOPIC</th>
<th>IN-CLASS ACTIVITIES</th>
<th>ASSIGNMENTS / OUTSIDE CLASS ACTIVITIES</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>M</td>
<td>April 3</td>
<td>Introduction to the Class</td>
<td>Review and discuss syllabus</td>
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<td>Lecture: What is Strategic Planning (part 1)?</td>
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<tr>
<td></td>
<td>W</td>
<td>April 5</td>
<td>Clients Visit</td>
<td>Representatives from the 8 teams we will work with will present in class</td>
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<tr>
<td>2</td>
<td>M</td>
<td>April 10</td>
<td>Team Assignments SP details</td>
<td>Teams will meet for the first time</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td>Lecture: What is Strategic Planning (part 2)?</td>
<td></td>
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<tr>
<td></td>
<td>W</td>
<td>April 12</td>
<td>Preparing For Site Visits</td>
<td>We will develop questions in preparation for site visits</td>
<td>Reflection 1 due (Sun)</td>
</tr>
<tr>
<td>3</td>
<td>M</td>
<td>April 17</td>
<td>Interviewing</td>
<td>We will discuss how to conduct SWOT interviews</td>
<td>Teams conduct site visits this week</td>
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<td></td>
<td></td>
<td>Teams will present information about client organizations and their nonprofit sector</td>
<td>Reflection 2 due (Sun)</td>
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<tr>
<td>4</td>
<td>M</td>
<td>April 24</td>
<td>Final Report Outlines</td>
<td>We will develop the outline for each team’s final report</td>
<td>Teams begin SWOT interviews</td>
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<td></td>
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<td></td>
<td>Teams will share what they’ve learned to date about their client organizations</td>
<td>Reflection 3 due (Sun)</td>
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<tr>
<td></td>
<td>W</td>
<td>April 25</td>
<td>Client Organizations Presentation 1</td>
<td></td>
<td>Submit site visit report (Sun)</td>
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<tr>
<td>5</td>
<td>M</td>
<td>May 1</td>
<td>Client Organizations Presentation 2</td>
<td>Teams will share what they’ve learned to date about their client organizations</td>
<td>SWOTs continue this week</td>
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<td>Reflection 4 due (Sun)</td>
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<td></td>
<td>W</td>
<td>May 3</td>
<td>Coding Qualitative Data</td>
<td>We will discuss how to code the results of your SWOT interviews</td>
<td>Submit final report - outline (Sun)</td>
</tr>
<tr>
<td>6</td>
<td>M</td>
<td>May 8</td>
<td>Guest speaker Mariah Acton</td>
<td>She will discuss preparation for your second client meeting to discuss SWOT results</td>
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<tr>
<td>WEEK</td>
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<td>TOPIC</td>
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<td>W</td>
<td>May 10</td>
<td>Identify Strategic Issues</td>
<td>We will discuss how to identify the strategic issues based on the information you've collected</td>
<td>Reflection 5 due (Sun) &lt;br&gt; Submit final report - Chapter 1 (Sun) &lt;br&gt; Team member evaluation 1 due (Sun)</td>
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<tr>
<td>7</td>
<td>M</td>
<td>May 15</td>
<td>Formulating Strategies</td>
<td>We’ll discuss how to develop strategies to address the strategic issues</td>
<td>Meet with client to discuss SWOT findings this week &lt;br&gt; Reflection 6 due (Sun) &lt;br&gt; Submit final report - SWOTs (Sun)</td>
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<tr>
<td>W</td>
<td>May 17</td>
<td>(to be determined)</td>
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<tr>
<td>8</td>
<td>M</td>
<td>May 22</td>
<td>Guest speaker Courtney Griesel</td>
<td>She will discuss how SP works in a large government organization</td>
<td>Reflection 7 due (Sun) &lt;br&gt; Submit final report - strategic plan (Sun) &lt;br&gt; Submit final report research (Sun)</td>
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<tr>
<td>W</td>
<td>May 24</td>
<td>Sharing Information Among Teams</td>
<td>Graduate Research Presentations 1</td>
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<tr>
<td>9</td>
<td>M</td>
<td>May 29</td>
<td>NO CLASS – Memorial Day</td>
<td>She will discuss how to prepare for your final client presentation</td>
<td>Reflection 8 due (Sun) &lt;br&gt; Submit Draft Plan to Client and Bob (Sun)</td>
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<tr>
<td>W</td>
<td>May 31</td>
<td>Guest speaker Mariah Acton</td>
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<tr>
<td>10</td>
<td>M</td>
<td>June 5</td>
<td>Sharing Information Among Teams</td>
<td>Graduate Research Presentations 2</td>
<td>Team member evaluation 2 due (Sun)</td>
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<tr>
<td>W</td>
<td>June 7</td>
<td>Class Evaluation</td>
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<tr>
<td>Wednesday, June 14</td>
<td>Final Plan Presentations 2:45 pm</td>
<td>Each team will present their plans to the class</td>
<td>Teams make final presentations to their clients &lt;br&gt; Teams submit final plans to clients and Bob</td>
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