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PSC 525.01: Strategic Planning and Leadership

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Political Science 525
Strategic Planning and Leadership
Fall 2002

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Course Description

For over a decade a movement has been underway to shift the focus of management from administering programs to achieving results. Strategic planning is an important tool in accomplishing this paradigm shift. Bryson defines it as a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it.

This course provides a basic understanding of strategic planning as a process and the forms of analysis it relies upon. It also explores how to make strategic planning a core component of principle-centered and vision-driven leadership, i.e., a means of aligning organizational values with organizational actions.

Course Objectives

1. To understand strategic planning as a decision-making process.
2. To develop skill in conducting the forms of analysis that strategic planning relies upon.
3. To learn how strategic planning can contribute to principle-centered, visionary leadership.

Required Texts

Steven R. Covey, First Things First (New York: Simon and Schuster, 1994).

John M. Bryson, Strategic Planning for Public and Nonprofit Organizations (San Francisco: Jossey-Bass, 1995)

Course Requirements

Students are required to read all reading assignments, be prepared to discuss them in class, write a short analytical essay (20 points), and develop a strategic plan for a government or non-profit agency (100 points).

Each student will choose a government or non-profit agency that he or she is familiar with and write a strategic plan for it (you won't actually submit it to the agency). Each plan will contain the

following sections: Introduction, Agency Mandates and Mission, Stakeholder Analysis, SWOT Analysis, Strategic Issues, and Strategic Goals and Actions.

Note: For purposes of this course you are to pretend that you are the staff person entrusted with facilitating the planning process. You will lead your staff through the various steps of the process and write up the results of your group's analyses.

Reading Assignments

- Sept. 12 **Introduction to Strategic Planning**
 Bryson, Chapter 1.
 Douglas Eadie, "Putting a Powerful Tool to Practical Use: The Application of Strategic Planning in the Public Sector."
- Sept. 19 **Strategic Planning as a Process and a Theory of Success**
 Bryson, Chapters 2 and 3.
- Sept. 26 **Strategic Planning in a Political Environment**
 Arie Halachmi, "Strategic Planning and Management? Not Necessarily."
 Barton Wechsler and Robert Backoff, "Policy Making and Administration in State Agencies: Strategic Management Approaches."
- Oct. 3 **Introduction to Strategic Leadership: Vision and Principles**
 Bryson, Chapter 8.
 Covey, Chapter 4 (pp. 79-82 only) and Chapter 5.
**** Start on next week's assignment****
- Oct. 10 **Principled Organizations Require Principled People**
 Covey, Chapters 11, 12, and 13.

****Assignment #1 is due today**** Write a 2-3 page analytical essay summarizing Covey's concept of principle-centered leadership and communicating what aspects of it that you think might be of value (or not of value) to you personally and to your organization.
- Oct. 17 **Organizational Mandates and Mission**
 Bryson, Chapter 4.

Assignment #2: Conduct interviews and obtain documents as needed to learn as much as you can about your agency, including its mission and mandates, stakeholders, SWOTs, and strategic issues. Write drafts of two sections of your strategic plan: 1) Agency Mandates and Mission, and 2) Stakeholder Analysis. Each section is typically 2-3 pages in length. **Due Oct. 31.**

Advice: 1) For public agencies we begin with analysis of mandates because what they exist to do and what they are free to do is expressed, implicitly or explicitly, in law, executive orders, judicial decisions, etc. Identify your formal mandates and describe the authority that has been given to you or withheld from you. Identify informal mandates only if they are things the agency cannot afford to ignore in pursuing mission. Where appropriate, also identify the rules that constrain how your mandates are carried out. Provide a summary of how clear your mandates are, and how constraining they are, i.e., how much or little freedom you have to define your organizational purposes and methods. For non-profit agencies, you may have little to say in this section. Describe any board policies, federal rules, etc., that establish agency purposes and constrain action. This analysis is necessary in order to determine the scope of your "freedom to act."

2) Students find the stakeholder analysis difficult. The idea is to think politically and identify the interests and expectations each set of stakeholders has of you. Through inductive reasoning, identify the criteria each will use to evaluate your organization's performance. Some stakeholders may be potential enemies in the sense that you may need their support and they may refuse to give it. Next, draw out the implications for your agency. For example, identify contradictions between expectations, difficulty of meeting competing expectations simultaneously, potential threats to agency autonomy and viability, how well you are doing in satisfying expectations, etc. Consistent with Bryson, you may wish to emphasize that satisfying stakeholders is what defines success, assuming that doing so does not violate your mandates, principles, and sense of mission.

3) If you offer a new or modified mission statement for your agency, make sure it captures what your agency exists to do and takes into account the expectations of your stakeholders. Following Covey, you may try to capture vision and values in your mission statement. You might add an introductory statement explaining that your mission statement was developed by the planning team after careful analysis of agency mandates and stakeholder expectations.

Oct. 24 ****No Class - Spend the Week on Assignment #2****

Oct. 31 ****Student Reports**** Be prepared to turn in your drafts and to discuss them informally in class.

Nov. 7 **SWOT Analysis**
Bryson, Chapter 5.

Assignment #3: Write the SWOT section of your plan, identifying each in one or two sentences. ****Due next week, Nov. 14****

Nov. 14 **Identifying Strategic Issues**
Bryson, Chapter 6.

Assignment #4: Write the plan's Strategic Issues section. Identify issues and explain why they are strategic to the agency. As Bryson writes, "An adequate strategic issue description 1) phrases the issue as a challenge that the organization can do something about and that has more than one solution, 2) discusses the confluence of factors (mission, mandates, and internal and external environmental aspects, or SWOTs) that make the issue strategic, and 3) articulates the consequences of not addressing the issue."

Nov. 21 **Developing and Implementing Strategic Goals and Actions**
Bryson, Chapters 7 and 9.

Assignment #5: Write the plan's Strategic Goals and Actions section. Identify specific goals (or strategic initiatives) that will allow the agency to address each of its most important (2-4) strategic issues and the specific actions to be taken to realize each of these goals. Present these in outline form. ****Due Dec. 5****

Nov. 28 ****Thanksgiving Holiday****

Dec. 5 **The Importance of Leadership**
Bryson, Chapters 11 and 12.

****Final Assignment**** Write an Introduction for your Strategic Plan, polish all previous sections, and compile them in the following order: **Due next week.**

Introduction

Strategic Issues

Strategic Goals and Actions

Appendix A: Agency Mandates and Mission

Appendix B: Stockholder Analysis

Appendix C: SWOT Analysis

Dec. 12 ****Oral Reports**** Each student will present a 5 minute summary of their agency's strategic issues and what they learned in this class that he or she found most useful.