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PSCI 525.50: Strategic Planning

Lisa Anne Upson

University of Montana, Missoula

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Strategic Planning and Leadership in Public Organizations (online)

University of Montana / Political Science 525.50-38292
Spring 2018: January 22-May 11, 2018

Instructor

Lisa Upson, J.D.

lisa.upson@mso.umt.edu

Office Hours (virtual): Flexible; email to set up a time to talk

Phone: 805-705-0915 (I prefer email first, but if you need to, please call)

Course Overview

This is a 3-credit 16-week online course (including both spring break and final exam weeks). We will use UM's Moodle platform for all course activity. There will be several written assignments in addition to readings and Moodle discussion forums: A simulated strategic plan made up of five components, a case study paper, and a final strategic plan. Week 10, the week of March 26, is spring break; this is a time for you to catch your breath, refine your draft strategic plan elements, and exchange feedback with me about the course and your progress. I will be available anytime throughout the course as well. Overall, the course will be very practice-oriented but with a grounding in theory.

Course Content

As used in public organizations for non-military purposes, strategic planning is relatively new, having been applied as a formal process starting in the 1980s. Since then, the context and practice of public administration has changed significantly. Civil service reforms and efforts to “reinvent” government have redefined what is required of public managers. The accountability movement, including government reforms and professionalization in the nonprofit arena, sharply focused public service on results and outcomes. Economic pressures have altered community priorities. Today, change is the rule rather than the exception, and most agencies and nonprofits now engage in some form of strategic planning. Creating public value through the administration of policies and programs is an evolving concept and dependent upon the specific organizational context. Strategic planning is a tool public leaders and managers can use to address specific organizational challenges, either respond to or create change, identify priorities and how to meet them – in service of an organizational mission (and ultimately vision). In many agencies and jurisdictions, strategic planning is mandated by law, and it is often requested by nonprofit funders.

Strategic planning can be defined many different ways. Bryson (2011) defines it as “a deliberative, disciplined approach to producing fundamental decisions and actions that shape and guide what an organization is, what it does, and why” (p. 7-8). Bryson (2011) adds a critical point: The key activity in strategic planning is not necessarily planning per se, but rather learning, strategic thinking, and developing plans for strategic action.

The strategic planning process is only a tool. Successful strategic planning and implementation requires strategic leadership. Strategic public leaders are visionary, purposeful, service-oriented, politically adept, make strategic decisions based on cultural and environmental assessments, and effectively work through others (Joyce, 2017). The best planning process means very little without effective strategic leadership and an effective management system to integrate it into operations.

In this course, you will have the opportunity to apply your work in your area of interest, whether that's a government agency, a nonprofit organization, a community group, a network or collaborative, a governing board, or other mission-driven public organization or entity.

Student Learning Objectives

- Understand and apply strategic planning as a deliberative process for learning and decision-making relative to fulfilling an organizational mission.
- Understand the benefits and challenges of strategic planning.
- Be exposed to a variety of strategic planning models.
- Apply the “Strategy Change Cycle” process of strategic planning (Bryson) and produce a simulated strategic plan.
- Understand and apply strategic leadership competencies.
- Understand strategic management systems including performance measurement.
- Develop fluency in strategic planning and leadership terminology and concepts.

Required Text

1. John M. Bryson, Strategic Planning for Public and Nonprofit Organizations, 4th edition, 2011 (Jossey-Bass).
2. There will be several required readings found in Moodle.

Optional: Bryson & Alston, Creating Your Strategic Plan: A Workbook for Public and Nonprofit Organizations, 3rd edition, 2011 (Jossey-Bass). This is the companion workbook to our Bryson text and provides steps, forms, and worksheets for each phase of the Strategy Change Cycle. While it is not necessary, the workbook may be helpful in the drafting of your strategic plan and also serve as an ongoing reference in your career. (One price point: Amazon sells it used starting at around \$20.)

Course Expectations and Requirements

This is a graduate level course; students are expected to demonstrate graduate level skills in research, reading comprehension and analysis, and writing.

Written Work. Since this is an online course, writing will be the primary form of participation and demonstration of your research, reading, and analytical skills. Strong writing skills are essential in public service work as well, so I will grade accordingly. While I do not expect the same level of writing proficiency in the Moodle discussion forums as in writing submissions (forums being slightly less formal and more conversational in some instances), I do expect thoughtful, articulate, and professional posts and responses in the discussion forums.

Additionally, written submissions must meet the following criteria, except as noted differently under specific assignment descriptions:

- Please do not include a title page; put your name and an assignment title in the header.
- Assignments are due by the date/time specified – late assignments will not be accepted.
- All assignments must be turned in electronically in Microsoft Word format. Submission of assignments via e-mail will not be accepted unless specific prior arrangements are made.
- Written work will be evaluated in terms of content/analysis, following instructions, organization, writing/grammar, and APA style when applicable.
- Student collusion is not permitted for individual assignments and will be treated as plagiarism.

Writing is an ongoing process for everyone irrespective of academic program, career stage or skill level. If your writing competency is not at the level needed for this graduate course, I recommend taking advantage of UM's Writing Center.

The University of Montana Writing and Public Speaking Center offers students in all disciplines free support as they write or prepare presentations for any course. Welcoming all students, The Writing Center provides a learning environment where students can engage in supportive conversations about their work and receive feedback at any point during their process. *To make an appointment and learn more about The Writing and Public Speaking Center, visit www.umt.edu/writingcenter or call 243-2266.*

The Writing Center offers the following services for Graduate Students relevant to this class:

- **Individual Consultations by Appointment**
The most effective help offered to all students is one-to-one consultations, to support graduate students as they work on seminar papers, proposals, conference presentations, and thesis/dissertation work. Depending on the project, you meet for half- or full-hour appointments. Many graduate students prefer to set up a recurring appointment with the same consultant.
- **Write-Ins**
Many graduate students appreciate a dedicated, weekly writing time. A Writing Center consultant will be available to help you set writing goals and to answer questions.

Weekly Highlights. The course is set up by weeks running from Monday morning through Sunday night. Each week you will find learning and assignment highlights in Moodle organized by topic or reading for that week. The highlights include important details about assignments, setting out specific requirements for each deliverable.

Discussion Forums. Dialogue in the weekly discussion forums is one of two main forms of participation in this class (written assignments being the other). Through the forum exchanges we all learn from one another's insights and analysis, exploration and questions. It is essential that students be engaged with other posts by reading and responding (see below for specific expectations).

Moodle. Students are required to check the course site in Moodle at least once/day. (Having taken online courses myself, I can say that participating in discussions is easier when you engage with them frequently.) You can connect to Moodle here: <http://umonline.umt.edu>. If you have technical problems, call UM Online by phone, (406) 243-4999 or email umonline-help@umontana.edu.

Grading. All grades will be posted in Moodle. Below are the course assignments, points available, and the rounded weight attributed to each in calculating your final grade. There are 400 total points available.

1. Discussion Forums (12 at 10 points each): 120 points, 30% of final grade
2. Case Study: 80 points, 20% of grade
3. Strategic Plan (5 parts at 30 points each, final plan at 50 points): 200 points, 50% of final grade.

The University of Montana uses the plus/minus grading system. To accommodate the plus/minus system the grading scale shown below will be used to reflect your final course grade.

Grade	Point Scale	Point Range	GPA
A	93-100	8 points	4.00
A-	90-92	3 points	3.67
B+	87-89	3 points	3.33
B	83-86	4 points	3.00

Grade	Point Scale	Point Range	GPA
B-	80-82	3 points	2.67
C+	77-79	3 points	2.33
C	73-76	4 points	2.00
C-	70-72	3 points	1.67
D+	67-69	3 points	1.33
D	63-66	4 points	1.00
D-	60-62	3 points	.667
F	59 or lower	N/A	0.00

Assignments

The course is set up on a weekly basis. Weeks run from Monday through Sunday. Each week will include a combination of required readings, online discussion forums, learning and assignment highlights, and written assignments when applicable. Unless noted otherwise, forum discussions close each Saturday at 11pm and written assignments are due by 11pm on Sundays, and must be submitted in Microsoft Word. **Late assignments are not accepted.** Descriptions of written assignments are below, with additional important details found in the Weekly Highlights.

Discussion with Professor – No points, but required

I have found that it can be very helpful for both student and instructor to have a brief discussion before or early in the semester, so I now make this a requirement. Here's how we will do this: Email me (lisa.upson@mso.umn.edu) about when would be a good time to have a 10-minute phone call and provide your number. When the time comes, I will give you a call. The purpose of this is to make a personal connection, to emphasize certain requirements in the course, and to get a sense of your goals, challenges, interests, etc. are relative to the course and course content.

Discussion Forums – 10 points each of 12 weeks (total 120 points, 30% of final grade)

Students are expected to stay on schedule with the weekly material. This is necessary for participation in the online discussions. Questions are designed to have you reflect on the weekly highlights, reading materials, and any relevant professional experiences you've had to express your thoughts, key learnings, insights, questions, etc. You must enter the Discussion Forum more than once per week. The first entry should be your response(s) to the required questions. Your second (and subsequent) entry should be to dialogue relative to your peers' postings.

Each week I will post up to five questions for students to respond to and discuss from Monday through Saturday. Unless otherwise noted, each student must choose at least 2 questions to respond to and discuss.

The Discussion Forum requires active student participation, which means students must:

1. Respond to the forum questions presented (at least two each week); and
2. Respond to other student responses – not all other student responses, but demonstrating active engagement across the second half of the week, by Saturday at 11pm.

While you do not need to use APA style in your posts, you should at least reference the author(s) for material or ideas that are not your own.

If you are curious as to how you are doing with your Discussion Forum responses during the semester, check your weekly grades in Moodle, and/or contact the instructor to set up a time to talk. Here are some general grading guidelines in addition to the two requirements above:

A level – Respond to at least two of the questions posted by the instructor and actively engages with classmates in the discussion forum. These responses are clearly articulated with good sentence structures, correct grammar and spelling. Such responses do not state, “I agree” or “I like what you’ve said.” The student presents a perspective or analysis, with support, or thoughtful feedback or questions. A rough length guideline is at least 200 words for original question responses and less for responses to others’ comments. Posts are made earlier in the week, such as by Thursday night, with responses/dialogue following Friday and Saturday. Moreover, evidence or references are used from course readings.

B-C range – Respond to one of the questions posed by the discussion leaders and are somewhat engaged with the class about questions for the week, or respond to two questions but with short text or little analysis. These responses may have a few grammatical and spelling errors or may not be clearly presented. The student attempts to articulate the main points, but the explanation is not clear enough or simply repeats what an author said. Length may be insufficient. The student may primarily express (dis)agreement with little support. The student submits later in the week and/or only engages once.

D and below – Occasional or periodic response to discussion questions. Does not post enough original responses or engage very much with others’. Responses are not clear and do not contain correct sentence structure or grammar. The student does not present comprehension of the readings, and the response is made late on Saturday, which does not provide enough time to discuss with classmates.

Case Study: Strategic Planning and Leadership – 80 points, 20% of final grade

The City of Glenville case can be found in Moodle. In a 4-5 page paper, students will respond to the case study question, found in the weekly information, by applying course material.

Your case study paper must be typed, double-spaced, use 12-point font, and have one-inch margins. Citations should adhere to APA style (in-text citations and a reference page are required; title page and abstract are not required); put your name and an assignment title in the header.

Strategic Plan – 200 points, 50% of final grade (30 points each component, 50 points final plan)

Each student will write a simulated strategic plan for a government agency, nonprofit organization, governing board, network or collaborative, community association, or other entity with a public service mission. Your plan will be simulated because you will create it on your own, in the fictitious role of the strategic planning process champion and coordinator, without an actual strategic planning process involving others. However, you will still be able to apply the process stages effectively and discuss why you chose particular activities and not others.

Students will choose a public organization they are familiar with or interested in. I recommend choosing an organization on the medium to small end of the spectrum, as this will allow you to more easily find information, and be more detailed and specific and get more out of applying the concepts. Choosing a large organization, especially, e.g., a large federal agency, will be unwieldy and allow only superficial research and a high level application of the principles. Mostly importantly, I recommend an organization you either know something about or can research easily (you can use your current organization), as you will need to find information to support your planning activities throughout the semester. You are welcome to get my input on your options or ideas at any time, but you must send your choice to me no later than the end of Week 3. You will not give your strategic plan to the organization or ask for the

participation of anyone associated with the organization as part of the assignments; this is strictly an application exercise that stays within the bounds of the course.

There are 10 steps to strategic planning in Bryson's Strategy Change Cycle, but the process is iterative, customizable, and many activities occur in more than one stage of the process. In order to fit the process into our class, we will modify it slightly, combine some steps, and leave out others. In your role as strategic planning champion and administrator in your organization, you will document anticipated outcomes of the following steps/activities, which will comprise five written assignments in the course, culminating in a final compiled strategic plan due the last week of the semester:

1. Initiation of the strategic planning process and agreement on a process design (stage 1)
2. Identification of organizational mandates (stage 2) as well as the organization's stakeholders, and mission clarification (stage 3)
3. Assessment of the internal and external environments, and critical success factors (stage 4)
4. Identification of strategic issues (stage 5)
5. Formulation of strategies (stage 6) and an implementation process/plan (stage 9) (no written assignment associated with stages 7 or 8, plan adoption and organizational vision)
6. Completed strategic plan document (no written assignment associated with design of a strategic management system and performance measures, stage 10)

Each of the six above will involve written assignments. I will grade the first five and provide general feedback. You will have an opportunity to make revisions, compile your plan, and submit it as your final course deliverable. The Weekly Highlights give important details about each step and each assignment.

Course Schedule

Once we get to Week 5, the written assignments ramp up quite a bit. Please look ahead so that you can plan appropriately. Falling behind will make completion of your plan very difficult.

Week 1: Jan. 22-28 – Course introduction & creating public value

Readings:

1. Syllabus
2. Moore, pp. 13-21
3. Weekly Highlights

Written Assignment: Forum discussions (close at 11pm Saturday)

Week 2: Jan. 29-Feb. 4 – Introduction to strategy and strategic planning

Readings:

1. Bryson, Ch. 1, pp. 1-40
2. La Piana, pp. 3-29
3. Weekly Highlights

Written Assignment: Forum discussions (close at 11pm Saturday)

Week 3: Feb. 5-11 – Strategic planning approaches & the Strategy Change Cycle

Readings:

1. Joyce: Ch. 8, pp. 186-192, 198-205; and Ch. 6, pp. 134-151
2. Bryson, Ch. 2
3. Weekly Highlights

Written Assignments:

1. Forum discussions (close at 11pm Saturday)
2. Email instructor with the organization for which you want to develop a plan, if you haven't yet, or make it a part of your phone call with the instructor

- - - Instructor phone calls must be completed - - -

Week 4: Feb. 12-18 – Strategic leadership: Competencies and roles in the planning process

Readings:

1. Joyce, Ch. 2
2. Bryson, Ch. 11
3. Weekly Highlights

Written Assignment: Forum discussions (close at 11pm Saturday)

Week 5: Feb. 19-25 – Initiating strategic planning

Readings:

1. Bryson, Ch. 3
2. Weekly Highlights

Written Assignments:

1. Forum discussions (close at 11pm Saturday)
2. Agreement and plan for the process, due by Sunday, 11pm

Week 6: Feb. 26-Mar. 4 – Identifying mandates, stakeholder analysis, and clarifying mission

Readings:

1. Bryson, Ch. 4
2. Weekly Highlights

Written Assignment:

1. Mandates, stakeholder analysis, and mission due by Sunday, 11pm (no forum)

Week 7: Mar. 5-11 – Strategic planning applications in small local governments

Readings:

1. Poister & Streib (2005)
2. Weekly Highlights

Written Assignment: Forum discussions (close at 11pm Saturday)

Week 8: Mar. 12-18 – Environmental assessment (SWOT/C) and critical success factors

Readings:

1. Bryson, Ch. 5
2. Weekly Highlights

Written Assignments:

1. Forum discussions (close at 11pm Saturday)
2. Environmental assessment and critical success factors due by Sunday, 11pm

Week 9: Mar. 19-25 – Strategic Plan documents

Readings:

1. Bryson, pp. 240-243
2. Sample strategic plan documents
3. Weekly Highlights

Written Assignment: Forum discussions (close at 11pm Saturday)

Week 10: Mar. 26-Apr. 1 – SPRING BREAK – No reading, no assignments due, and no forum!

Week 11: Apr. 2-8 – Identifying strategic issues

Readings:

1. Bryson Ch. 6
2. Weekly Highlights

Written Assignments:

1. Forum discussions (close at 11pm Saturday)
2. Strategic issues due by Sunday, 11pm

Week 12: Apr. 9-15 – Formulating strategies and organizational visions

Readings:

1. Bryson Ch. 7 and Ch. 8
2. Weekly Highlights

Written Assignment: Forum discussions (close at 11pm Saturday)

Week 13: Apr. 16-22 – Formulating strategies and implementation process/plan

Readings:

1. Bryson Ch. 7 and Ch. 9
2. Weekly Highlights

Written Assignment:

1. Strategies and implementation plan due by Sunday, 11pm (no forum)

Week 14: Apr. 23-29 – Supporting planning with performance measures and management

Readings:

1. Bryson Ch. 10
2. Poister et al. (2015), Ch. 8
3. Weekly Highlights

Written Assignment: Forum discussions (close at 11pm Saturday)

Week 15: Apr. 30-May 6 – Strategic planning and leadership applied: Case Study

Readings:

1. Case: City of Glenville
2. Weekly Highlights

Written Assignment: Case study paper due by 11pm Sunday (no forum)

Week 16: May 7-11 (final exam week) – Strategic Plan

Readings:

1. Bryson, pp. 240-243
2. Weekly Highlights

Written Assignments:

1. Forum discussions (close at 11pm Friday)
2. Compile your final strategic plan document, due by Friday 11pm

Course Reading References

For your reference, here are the course reading sources (other than Bryson) found in Moodle:

Mark Moore, Creating Public Value: Strategic Management in Government, 1995 (Harvard Univ. Press)

David La Piana, The Nonprofit Strategy Revolution: Real-Time Strategic Planning in a Rapid-Response World, 2008 (Fieldstone Alliance)

Paul Joyce, Strategic Leadership in the Public Sector, 2017 (Routledge)

Theodore Poister, Maria Aristigueta, and Jeremy Hall; Managing and Measuring Performance in Public and Nonprofit Organizations, 2015 (Jossey-Bass)

Poister, T. H. & Streib, G. (2005). Elements of strategic planning and management in municipal government: Status after two decades. *Public Administration Review*, 65(1), pp. 45-56.

University/Class Policies

Please be familiar with the following University or class policies:

Disability Assistance: The University of Montana does not discriminate against qualified students with disabilities. If a student would like to discuss the availability of accommodations, or any other matter relating to their disability, please contact [Disability Services for Students](#). We will work with you to provide an appropriate modification.

Incompletes or Withdrawals for the Course: If for some reason the course is not working out for you please adhere to the University's policies for the last day to drop a class.

Late Assignments: Students are expected to submit all work by the date/time specified in the course calendar. Any exceptions to this must be approved by the instructor 72 hours before the date in question or be a clear emergency. Students must complete all assignments to receive a grade for the course.

University Attendance Policy: Students who are registered for a course but do not participate in the first two class forums/requirements may be required by the instructor to drop the course. This rule allows for early identification of class vacancies and to permit other students to add classes. Students must complete a drop form or drop the course in [Cyber Bear](#) to avoid receiving a failing grade. Students who know they will be absent, cannot participate or submit assignments should contact the instructor in advance.

Wikipedia: This online source is not reliable and should not be cited in any course assignment. The goal is to become accustomed to using scholarly sources for all work in any of your courses.

Academic Dishonesty (Plagiarism): Students must follow the University's policies for [academic conduct](#). The University's Graduate School Plagiarism Warning states:

Plagiarism is the appropriation or imitation of the language, ideas, and thoughts of another author and representing them as one's original work. It is a particularly intolerable offense in the academic community and is strictly forbidden. Students who plagiarize may fail the course and may be remanded to Academic Court for possible suspension or expulsion. Students must always be very careful to acknowledge any kind of borrowing that is included in their work. This means not only borrowed wording but also ideas. Acknowledgement of whatever is not one's own original work is the proper and honest use of sources. Failure to acknowledge whatever is not one's own original work is plagiarism. ([UM Graduate School Degree Standard B6.000](#))

All work submitted must be your own; no duplicate work (work completed for another class) will be accepted. Acts of cheating or plagiarism will result in a grade of zero (0) for the assignment. Moreover, acts of plagiarism will also be reported to the Academic Court. To avoid acts of plagiarism, cite each reference or source you use and give proper credit for the ideas, opinions, and findings of others. When you are using the exact words of others, you must use quotation marks and include the page number where you found the quote in your citation.