

Strategic Planning and Leadership in Public Organizations (online)

University of Montana / Political Science 525
Spring 2017: January 23-May 5, 2017

Instructor

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Course Overview

This is a 3-credit 15-week online course (no in-person classes). We will use UM's Moodle platform for all course activity. The course will be interactive, particularly in Moodle discussion forums. There will be several written assignments in addition to readings and discussion forums: A strategic plan analysis, a case study, and a strategic plan made up of eight assignments. The week of March 20th 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 planning per se, but rather learning, strategic thinking, and strategic action.

However, 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 in relation 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).
- 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 for \$30 used and \$45 new.)

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.

Weekly Highlights. The course is set up by weeks, each week going 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 weight attributed to each in calculating your final grade.

1. Discussion Forums (13 at 10 points each): 130 points, 25% of final grade
2. Strategic Plan Analysis: 95 points, 18% of grade
3. Case Study: 115 points, 22% of grade
4. Strategic Plan (8 parts; 7 at 20 points each, final at 40 points): 180 points, 35% 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
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, 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. Forum discussions close each Saturday at 11pm. Written assignments, unless specified otherwise, 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 Forums – 10 points each week (total 130 points, 25% of final grade)

Students are expected to stay on schedule with the weekly material. This is necessary for participation in the online discussions. Except as otherwise noted, each week on Tuesday evening I will post 4 questions for students to respond to and discuss from Wednesday through Saturday. Each student must choose 2 questions to respond to and discuss. Posting closes at 11pm Saturday each week.

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 week.

Students must complete both 1 and 2 above to receive credit. In order to do this successfully, students must begin to engage in the discussion early in the week, no later than Thursday. Students who wait until Saturday and post only/primarily at the end will have their grade reflect this.

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, contact the instructor to set up a time to talk. Here are some general grading guidelines:

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 and some responses are made early in the week. Moreover, evidence (i.e. quotes or references) is 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.

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.

Strategic Plan and Planning Process Analysis – 95 points; 18% of final grade

For this assignment, students will review and analyze a strategic plan. Strategic plans for public organizations, including information about the planning processes, are easily found on the Internet. You can use a plan that you find or you can use one that I provide (please do not use your own org’s plan). I have provided three strategic plans in Moodle for this assignment. The samples are not “model” plans in that they represent the best of strategic planning, however, each has strong points and enough substance and content for analysis at this point of the semester. If you want to use a plan that you find, first look at the samples in Moodle so that you can see what is generally expected for substance and content.

In a 3-5 page paper, address the following (not necessarily in this order):

- Give a brief description of the plan you chose
- Provide a general impression of the plan presentation
- What process was used to create the plan, and what is your assessment of the process used?
- Content: As a citizen/stakeholder, what level of confidence do you have reading through the plan? What is helpful? What more would you like to see in the plan? (This might include content strengths and weaknesses but doesn't have to be presented this way.)
- What feedback would you give to the organization leaders for their next planning process and/or the next time they present a strategic plan to the public?

It is expected that students will apply course material in their written analysis where applicable. The paper must be typed, double-spaced, use 12-point font, and have one-inch margins. You do not need to cite the plan as you refer to it throughout your paper. If you use other sources, your citations should adhere to APA style. Please do not include a title page; put your name and an assignment title in the header.

Note: Strategic plans presented to the public obviously do not give us much information about the challenges experienced during planning, and sometimes they lack substantive information about the planning process. There is a lot that happens “behind the scenes” during strategic planning that outsiders cannot learn by reviewing a plan document. Often there are even multiple versions of strategic plans; different versions given to different stakeholder groups. For this assignment, we assume that we have limited information; however, you will find enough information to conduct a meaningful analysis.

Case Study: Strategic Planning and Leadership – 115 points, 22% 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 – 180 points, 35% of final grade (20 points each element, 40 points compiled 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 mission of public service. 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, which will allow you to be more detailed and specific and get more out of applying the concepts. (Whereas choosing a large organization, especially, e.g., a large federal agency, will 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, 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 some elements. 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 seven 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 one)
2. Identification of organizational mandates (stage two) as well as the organization's stakeholders, and mission clarification (stage three)
3. Assessment of the internal and external environments, and critical success factors (stage four)
4. Identification of strategic issues (stage five)
5. Formulation of strategies (stage six) and articulation of an organizational vision for the future (stage eight) (no written assignment associated with stage seven, plan adoption)
6. Development of an implementation process/plan (stage nine)
7. Design of a strategic management system and performance measures (stage ten)
8. Completed strategic plan document

Each of the above will involve written assignments. I will grade the first seven 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.

In order to complete your strategic plan, you may at times need to invent people, activities, and other details. There may also be points where it will be helpful to describe your decision making, like an annotation or sidebar narrative to explain why you took a certain approach. This is not required, but feel free to do so, as long as you make it clear your commentary is separate and not a part of your plan.

Course Schedule

The course is intensive in the middle of the semester due to development of the strategic plan. Please look ahead so that you can plan appropriately.

Week 1: Jan. 23-29 – Course Introduction & Creating public value

Readings:

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

Written Assignment: Discussions (close at 11pm Saturday)

Week 2: Jan. 30-Feb. 5 – Introduction to strategy and strategic planning

Readings:

1. Bryson, Ch. 1
2. La Piana, pp. 4-27
3. Weekly Highlights

Written Assignment: Discussions (close at 11pm Saturday)

Week 3: Feb. 6-12 – 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. Discussions (close at 11pm Saturday)
2. Email instructor with the organization for which you want to develop a plan

Week 4: Feb. 13-19 – Strategic planning applications in public organizations

Readings:

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

Written Assignments:

1. Discussions (close at 11pm Saturday)
2. Strategic planning and process analysis due by Sunday, 11pm

Week 5: Feb. 20-26 – Strategic leadership: Competencies and roles in planning

Readings:

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

Written Assignment: Discussions (close at 11pm Saturday)

Week 6: Feb. 27-Mar. 5 – Initiating strategic planning

Readings:

1. Bryson, Ch. 3
2. Weekly Highlights

Written Assignments:

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

Week 7: Mar. 6-12 – Identifying mandates, stakeholder analysis, and clarifying mission

Readings:

1. Bryson, Ch. 4
2. Weekly Highlights

Written Assignments:

1. Discussions (close at 11pm Saturday)
2. Mandates, stakeholder analysis, and mission due by Sunday, 11pm

Week 8: Mar. 13-19 – Environmental assessment (SWOT/C)

Readings:

1. Bryson, Ch. 5
2. Weekly Highlights

Written Assignments:

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

Week 9: Mar. 20-26 – SPRING BREAK – No reading, no assignments due, and no discussion forum

Week 10: Mar. 27-Apr. 2 – Identifying strategic issues

Readings:

1. Bryson Ch. 6
2. Weekly Highlights

Written Assignments:

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

Week 11: Apr. 3-9 – Formulating strategies and organizational vision

Readings:

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

Written Assignments:

1. Discussions (close at 11pm Saturday)
2. Strategies and org vision due by Sunday, 11pm

Week 12: Apr. 10-16 – Implementation

Readings:

1. Bryson Ch. 9
2. Bryson Ch. 10
3. Weekly Highlights

Written Assignments:

1. Discussions (close at 11pm Saturday)
2. Implementation plan due by Sunday, 11pm

Week 13: Apr. 17-23 – Supporting planning with performance measures and management

Readings:

1. Poister (2010)
2. Poister et al. (2015), Ch. 8
3. Weekly Highlights

Written Assignments:

1. Discussions (close at 11pm Saturday)
2. Strategic Management System description and performance measures due by 11pm Sunday

Week 14: Apr. 24-30 – Strategic planning and leadership applied

Readings:

1. Case: City of Glenville
2. Weekly Highlights

Written Assignment: Case study paper due by 11pm Sunday

Week 15: May 1-5 – Strategic Plan

Readings:

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

Written Assignments:

1. Discussions (close at 11pm Friday)
2. Revise/add to and compile your strategic plan; final plans 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. (2010). The future of strategic planning in the public sector: Linking strategic management and performance. *Public Administration Review*, December, pp. S246-S254.

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.