

PSC 5133

Strategic Planning and Performance Measurement

MPA
**MASTER OF PUBLIC
ADMINISTRATION**

Instructor: Dr. Jamie Smith
Class Time: 5:30-9:10
Class Location: 221 Learning Center

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Course Description

This course introduces students to strategic planning, performance assessment and benchmarking in the public sector. The goal of the course is to offer students an introductory look at strategic management and to illustrate development, implementation, and reformulation of public policy and operational strategy. Emphasis is placed on the need for awareness of, and accommodation to, changes in an organization's environments. The course operates in a seminar format with significant individual class member participation required.

Can strategic planning be used to build public organizations that function more creatively and effectively? This course focuses on the theory and practice of strategic planning and introduces basic concepts of the planning process to those working (or, planning to work) in public or nonprofit organizations. Specifically, we will explore strategic planning as a tool that can be used for organizational management and effective governance. To do so, we will examine all facets of the strategic planning process, including: development of a guiding mission, recognition of emerging trends and issues, identification of strategic options, implementation of appropriate strategies, and evaluation of organizational performance. To this end, the purpose of this course is to help you understand the nature of strategic planning, its component parts, and ultimately how to construct a strategic plan.

Learning Objectives

By the end of this course students who have fully participated and read all course material should have:

1. An understanding of the fundamentals of strategy and strategic planning in public and nonprofit organizations
2. Knowledge of the skills needed to conduct a basic strategic plan for a public and/or a nonprofit organization
3. Familiarity with pertinent historical, contemporary, and emerging literature relating to strategic planning and management

4. A working competence in the analytical, process, writing, presentation, and reflective skills required for effective practice in the core tasks associated with strategic planning and management.

In addition to course material, we will concentrate on three other essential skills for those working (or, planning to work) in public and nonprofit organizations: teamwork, oral presentation skills, and written presentation skills.

Textbook and Course Readings

There are two required texts for the course:

1. Bryson, John M. *Strategic Planning for Public and Nonprofit Organizations*. San Francisco: Jossey-Bass. 2011 (4th ed). ISBN: 978-0470392515.
2. Poister, Theodore H. *Measuring Performance in Public and Nonprofit Organizations*. 1 edition. San Francisco: Jossey-Bass, 2003. ISBN: 978-078794999.

Additional required reading material(s) may be indicated in the Course Schedule (below). All required reading material (with the exception of textbook material) is available on the course D2L site.

Assignments

Group Case Reports

(3 Case Reports)

While learning the theory is a good start to understanding strategic planning, experiential learning can further understanding and skills. Therefore, students will work through a series of case studies. Case studies are written to provide background information and some administrative difficulties. The purpose of the case is to provide insights into real-world challenges of managing public and nonprofit organizations. The information provided in the cases is meant to replicate the information that was known at the time. The problems related to the case may or may not be clearly defined. If a decision has been described in the case, students may be asked to evaluate the decision. Throughout the course, we will use these case studies to identify and evaluate problems related to strategic planning and performance measurement while seeking to strategically select meaningful ways of addressing such problems.

If you have a staunch objection to working in a group, notify the instructor by email with in one week of the start of the class and you will be provided case studies to work through individually. Because one of the difficulties of groups work is facilitating busy schedules, some class time may be provided to work with your group. Class time should be spent working on, assembling, or asking questions to facilitate the completion of these assignments.

Case reports should demonstrate excellent understanding of the case along with an accurate and thoughtful application of the appropriate tools. Case reports should offer a clear, direct analysis supported by a well-constructed and well-supported argument. Groups should acknowledge in the report when/if they are making any assumptions or predictions. Ultimately these case reports should demonstrate students' ability to assess a situation and develop strategies on how to improve the

situation and/or avoid future problems. Case reports should be no more than five single-spaced pages (not including front or back matter), use 12-point font, and have one-inch margins.

Group Led and Facilitated Discussion

In groups, you will be required to lead two sections of a class session (as indicated in the Course Outline and in the Course Schedule, below). Leading a class session consists of several tasks. The first is to create a presentation of the materials for that topic. Presentation of the material should be no longer than 20 minutes.

In addition to presenting a twenty-minute synthesis of the selected required readings for the week, your group will also be responsible for facilitating a constructive and energetic discussion about the topic. Therefore, at least ten minutes following the presentation should be devoted to class discussion and/or activities. Part of this responsibility includes keeping the discussion/activity on track, connecting disparate contributions, and providing critical perspectives/feedback to your peers.

Your group's grade will be determined by the extent to which your questions and leadership result in a robust discussion of the readings and issues for the week and your presentation helps to synthesize the required materials. Groups that adequately prepare and develop thoughtful discussion questions/activities should receive full points. The goal of "Group Lead and Facilitated Discussion" sessions is to provide you with an opportunity to practice your leadership skills while working in a team setting.

Class Final Assignment: Strategic Planning for the Nonprofit Certificate and MPA Program

The primary project associated with this course is the development of a strategic plan for the future either the Nonprofit Certificate in the OU-Tulsa MPA Program or the OU-Tulsa MPA Program itself. This class will serve as a model strategic planning task force for this initiative. The charge for this project is listed below.

The Nonprofit Certificate

Charge

The Strategic Planning Task Force is charged by the Executive Committee to develop a plan that will identify current and future priorities and guide decisions regarding the creation and integration of new programming related to the forthcoming Nonprofit Certificate to be administered in the OU-Tulsa MPA Program. The certificate will begin enrolling students for the Fall 2016 semester and seek to enroll a new cohort biannually. The committee is responsible for developing appropriate planning documents (Vision Statement, Strategic Plan, Implementation Plan, Benchmarks or Assessment, etc.)

The OU-Tulsa MPA Program

Charge

The Strategic Planning Task Force is charged by the Executive Committee to develop a plan that will identify current and future priorities and guide decisions regarding the development and expansion of the OU-Tulsa MPA Program. This strategic plan will seek to plan for the next three to five years of the program. The committee is responsible for developing appropriate planning documents (Vision Statement, Strategic Plan, Implementation Plan, Benchmarks or Assessment, etc.)

Tasks

To help execute its charge, the Strategic Planning Task Force will:

- Assess the OU-Tulsa MPA program's current structure and determine which elements may support or hinder the implementation of the new Nonprofit Certificate
- Assess and determine how to best integrate Nonprofit Certificate program activities with a broader array of strategic priorities for the new planning period;
- Establish a program that ensures consultation with, and participation by, relevant stake-holders, internal and external to the OU-Tulsa MPA Program, on the identification of strategic priorities and the establishment of assessment mechanisms;
- Identify a small number of strategic priorities that will guide decisions as well as metrics for assessment of progress toward goals aligned with each priority (including but not limited to number of students enrolled, tuition dollars generated, program longevity, etc.);
- Submit a final report and Strategic Plan for review and adoption by the Executive Committee no later than May 3, 2016.

Tasks

To help execute its charge, the Strategic Planning Task Force will:

- Assess the OU-Tulsa MPA program's current structure and determine which elements may support or hinder the growth of the program
- Assess and determine how current curriculum, staff, resource and other factors affect the current status of the program and the broader array of strategic priorities for the new planning period;
- Establish a program that ensures consultation with, and participation by, relevant stake-holders, internal and external to the OU-Tulsa MPA Program, on the identification of strategic priorities and the establishment of assessment mechanisms;
- Identify a small number of strategic priorities that will guide decisions as well as metrics for assessment of progress toward goals aligned with each priority (including but not limited to number of students enrolled, tuition dollars generated, program longevity, etc.);
- Submit a final report and Strategic Plan for review and adoption by the Executive Committee no later than May 3, 2016.

Report Format

The final document should be no more than 15 pages of single-spaced text—not including references, and appendices if applicable—and, no smaller than one-inch margins and 12-point, non-condensed font. Aside from these basic requirements on structure, the group has a lot of freedom with the final appearance of the report—though the final report should have a polished and professional look.

In addition to the quality of your work and the conciseness of your document, you will also be evaluated on the thoroughness of your research. Not only will the course material(s) provide you with a wealth of resources regarding strategic planning, but also in the Internet age you have access to a wide variety of sources of information. If you cannot find specific program information online, you may additionally request any information of me that you feel is necessary for completion of the report. These requests should be submitted a week in advance. Due to the wealth of information available to you, expectations are high that you will not simply rely on three or four information sources in developing this report. Please remember to cite all sources and to be consistent in the citation style that you choose to use (e.g. footnotes, endnotes, APA, MLA style). Each group will have ample time during the final class session to present the major components of their model and the instructor and other recruited audience members. During the presentation, the group should highlight how their

Guide serves as an easy to follow and practical tool that can be used by stakeholders to move forward on the Nonprofit Certificate.

Individual Strategy Practice “Notebook”

The strategy practice notebook is your individual written exploration and assessment of how course concepts relate to an organization that you are familiar with (or would like to be familiar with). You are to develop your strategy practice “notes” throughout the semester by selecting and summarizing readings, frameworks, concepts, and theories from this course that are most influential for your thinking about the strategic planning process. In your notes, identify how the material(s) correlate (or, do not correlate) with your professional experience and your present work environment (or your past or future professional experience and work environment). During finals week, you are to submit your strategy practice notebook as evidence of your cumulative learning in this course. The final document should be no more than 10 pages of single-spaced text—not including appendices, if applicable—and, no smaller than one-inch margins and 12-point, non-condensed font. A reference list should be included (as there should be evidence that you have done the required readings throughout the semester). Aside from these basic requirements on structure, your “Notebook” can be as creative as possible.

Individual Written Assignment

There is one individual written assignment in this course—no more than 5 pages (of single-spaced text, and no smaller than one-inch margins and 12-point, non-condensed font). References must be included. Details of the assignment are provided in the Course Outline and in the Course Schedule (below).

Individual Participation

Active participation is one of the best and most reliable ways to demonstrate your understanding of ideas and concepts discussed in the readings and presented in class. My role (as the instructor for this course) is to provide you with a conceptual framework and to facilitate your learning. My role is not merely to deliver factual material to passive learners. The exercises and discussions in this course are intended to provide you with an opportunity to test your knowledge, formulate ideas and strategies, respond to strategic management dilemmas, and get feedback from peers. Therefore, weekly class attendance is necessary, but not sufficient for an excellent class participation grade.

Summary of Graded Assignments*

Outcome/Deliverable	Type	Description	Value
Participation	Individual		5%
Midterm	Individual	Written Assignment	10%
Strategy Practice Notebook	Individual	Written Assignment	15%
Case Reports	Group**	3 case reports	(3@10% Each) 30%
Reading Presentation and Facilitated Discussion	Group**	Presentation and Discussion Questions (or Activities)	(2@5% Each) 10%
Strategic Plan and Presentation	Group**	Written Assignment and Presentation	30%

*The instructor reserves the right to add, remove, or reorder these assignments at her discretion and in accordance with university policy

**As a substantial part of the final grade for this course relies on group work, students will be given the opportunity to individual evaluate each group member's contribution to the final product after each assignment.

Information and Reminders

Accommodation Policy

The University of Oklahoma is committed to providing reasonable accommodation for all students with disabilities. Students with disabilities who require accommodations in this course are requested to speak with the professor as early in the semester as possible. Students with disabilities must be registered with the Office of Disability Services prior to receiving accommodations in this course.

Religious Observance Policy

It is the policy of the University of Oklahoma to excuse absences of students that result from religious observances and to provide without penalty for the rescheduling of examinations and additional required class work that may fall on religious holidays. If class conflicts with a religious observance, please notify me at least 24 hours before the class in question so we may schedule appropriate make up assignments.

Internet Information

This course will make use of D2L. Internet access and access to this platform are required for success in the course. Slides, revisions to the syllabus, readings, announcements, changes to this syllabus, etc. can all be found in the appropriate folder on the D2L page for this course.

The primary means of communication for this course will be email. Be sure to check your OU-issued email regularly.

Due Dates and Late Assignments

All assignments are due in the D2L dropbox before the start of class. Late assignments will be accepted for four days after the due date with a late penalty assessed for each day, class or otherwise, that it is late. Illness, schedule conflicts, family problems, computer issues are not valid reasons for late assignments—plan and work ahead.

Make-up exams will be given only in extraordinary circumstances. Students are permitted to take a make-up exam only in the case of documented illness, death in the family, and approved university activity. Notification of missed exams must be received prior to the exam day.

Academic Integrity

Academic integrity means honesty and responsibility in scholarship. Professors have to obey rules of honest scholarship, and so do students. For more information about academic integrity, including a statement of what constitutes academic misconduct and plagiarism, see OU's "A Student's Guide to Academic Integrity" at <http://www.ou.edu/provost/integrity/>. When writing about, paraphrasing, or quoting the work of others, you must give proper attribution in the form of parenthetical citations and quotation marks around directly quoted phrases or sentences. Using work in this class that you have completed for another class is plagiarism. Ignorance is not an acceptable excuse for plagiarism. Any work not resulting from the student's own efforts will result in a grade of 0 and be turned in to the property authorities. This includes plagiarized papers, copied assignments, cheating on exams, or any other dishonest activity.

Course Schedule*

Date	Topic	Readings	Assignments**
1/19	Introduction: Overview and Strategy Change Cycle	Bryson: Chapters 1 and 2 (skim) The Five Ps of Strategies (D2L) Another Look at Why Organizations Need Strategies (D2L) Managing for Values (D2L)	Sign Up to Lead Discussion
1/26	Initiating the Process and Clarifying the mission and Mandates	Bryson: Chapter 3 and 4 The Sound of No Music (D2L)	
2/2	Assessing the Environment and Identifying Strategic Issues	Bryson: Chapter 5 and 6 From competitive advantage to damage control (D2L) Five competitive Forces that Shape Strategy (D2L)	Group Led Discussion
2/9	No Class—Kelly LeRoux		Case Report 1

Date	Topic	Readings	Assignments**
2/16	Formulating and Adopting Strategies	Bryson: Chapter 7 Strategy Content and Public Service Orgs (D2L) Strategy formulation in nonprofit social services organizations (D2L)	Group Led Discussion
2/23	Establishing a Vision for the Future	Bryson: Chapter 8 Building your Companies Vision (D2L)	Group Led Discussion Case Report 2
3/1	Implementation and Alternative Approaches	Bryson: Chapter 9 A strategic planning process for a small nonprofit organization (D2L) When is appreciative inquiry transformational? A meta-case analysis (D2L)	Group Led Discussion
3/8			midterm/writing assignment
3/15	Spring Break		
3/22	Designing a performance measurement system	Poister: Chapter 1 and 2 Measuring social value (D2L)	Group Led Discussion
3/29	Elements of a performance measurements	Poister: Chapter 3 and 4	Group Led Discussion
4/5	Designing Performance Indicators and Analyzing Performance Data	Poister: Chapter 5 and 6 Why different organizations need different measures (D2L)	Case Report 3
4/12	Reporting and Processing Performance Measures	Poister: Chapter 7 and 8	Group Led Discussion
4/19	Performance Measurement and Strategic Planning	Poister: Chapter 9 and 11 Strategic performance measurement and management in nonprofit organizations (D2L)	Group Led Discussion
4/26	Bench marking & Implementation	Poister: Chapter 13 and 14	
5/3	Final Presentations		Final Report and Individual Strategy Notebook

*The Instructor reserves the right to add to, remove, or reorder these assignments as she sees fit and in accordance with university policy.

**All assignments are due before the start of class, with the exception of materials for group led discussion, which may be handed in at the end of class.