Instructor: Toby Futrell
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Course Description

This course is designed to provide an overview of strategic planning in public and nonprofit organizations (and communities). Fundamental concepts and practices of strategic planning and management are introduced with special emphasis on local government strategic planning in the United States. Strategic planning is 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. In fact, leaders and managers of public and nonprofit organizations are expected to be effective strategists if these organizations are to fulfill their missions, meet their mandates, satisfy their constituents, and create public values in the years ahead. In addition, public agents need to develop not only effective strategies to cope with changed and changing circumstances, but also a coherent and defensible basis for their decisions.

Student Learning Objectives

By the end of this course, the successful student will be able to:

1. Explain the reasons public and non-profit organizations should embrace strategic planning as way to improve performance, including determining the various ways in which strategic planning may be institutionalized so that strategic thinking, acting, and learning may be encouraged and embraced across an entire organization;
2. Evaluate a strategic planning and management process that has been used successfully or unsuccessfully by a public or nonprofit organization, including analyzing what successful and/or unsuccessful practices were involved;
3. Discuss application of the strategic planning process, including information on specific tools and techniques that might prove useful in various circumstances within or across public and nonprofit organizations;
4. Analyze the major roles that must be played by various individuals and groups for strategic planning to work and how to play the roles;
5. Produce a strategic plan for a public or nonprofit organization, including formulating the steps involved in implementing and revising that plan effectively.

Required Texts

The textbooks are available for purchase at the university bookstore or www.amazon.com. Additional materials may be made available to you by the instructor during the semester.

Recommended Books


Recommended Journal Articles


Course Requirements and Grading

You are expected to complete the assigned readings before class. Grades will be based on your performance on a series of assignments and classroom participation with the following distribution:

- Attendance and Participation: 10%
- Chapter Review and Presentation (individually assigned dates): 20%
- Article Review (9/28): 10%
- Evaluation of an Existing Public or Non Profit Strategic Plan (10/26): 20%
- Develop a Public or Non Profit Strategic Plan Proposal (11/9): 10%
- Complete a Public or Non Profit Strategic Plan (12/14): 30%
- Late work is penalized a minimum of 10 points without exception, i.e., a reduction of one letter grade after the assignment is due. No work is accepted past the class that follows the original assignment due date. Incompletes are given only when a student cannot complete the course due to circumstances beyond her/his control (as determined by the instructor.)

Grading System

A final grade will be reported as follows:

- A: 100-90; B: 89.9-80; C: 79.9-70; D: 69.9-60; F: 59.9-0

However, grades on the assignments will be calculated as follows:

- A+: 100%; A: 95%; A-: 90%
- B+: 88%; B: 85%; B-: 80%
- C+: 78%; C: 75%; C-: 70%
- D: 60%
- F: 0%

Attendance and Participation (10%)

Students are expected to arrive for class on time, as a demonstration that they can function responsibly in this learning environment. Without exception, attending late or leaving early is calculated as a half attendance. The instructor will check attendance regularly. Presenting a medical document is the only way to achieve an excused absence or excused half attendance.

- With active class participation, 1 unexcused absence or less earns a student the full 10% for attendance and participation.
- With active class participation, 3 unexcused absences or less earns a student 5% for attendance and participation
- Four unexcused absences earns a student a zero for attendance and participation
- Five unexcused absences will result in “F” for the entire course.
Turn off your cellular phone and pager during class. Using a laptop computer for taking notes in class is fine, but internet surfing or online chatting is prohibited and will be detrimental to your attendance and participation grade.

You are expected to have read the materials before class. Student questions and comments are both expected and welcomed. Students learn best by actively participating in the teaching-learning process. You can learn as much from your classmates as you can from me. You will be asked to participate in numerous discussion activities.

Class topics parallel the assigned reading(s) specified on this syllabus. Again, you are expected to have read the assignments before the topic is presented. The participation part of your grade is dependent upon how well you respond to the in-class discussion and questions. On a sliding scale:

- **Active** participation is when a student demonstrates an understanding of all assigned readings; is able to make connections among course topics; is able to add their own insights; and goes beyond assigned readings.

- **Adequate** participation is when a student demonstrates familiarity with all assigned readings through classroom discussion.

- **Minimal** participation is when a student demonstrates familiarity with some of the readings, but a lack of preparation or insufficient participation on other topics; and participates only when called upon or when assigned to a small group.

### Chapter Review and Presentation (20%)

You are required to select one chapter from the Bryson or Allison & Kaye text that interests you and write a 6-8 page, double-spaced review paper. The review paper should include key characteristics of theory, your analysis of it, its strengths and weaknesses, its implications, and your suggestions for improving theory and practice. You need to apply the major concepts and theories to real-life strategic planning. **The paper will be graded on the extent to which the student provides analysis and critique and responds competently to the readings.** The paper should **not** be simply a summary of the chapter **nor** rely substantially on quotations from the chapter. The paper should be critical, analytical, and concise. Additionally, properly cite your sources using the APA style for citations and references including any other sources you use to augment the chapter.

Also, **you are required to present your selected review paper on the day the material is scheduled to be presented in class.** You are expected to lead discussions positively and respond to questions from students effectively. A 30-minute presentation and a 15 minute discussion would be fine. You are encouraged to use Power Point with a presentation handout for the class.

### Article Review (10%)

You are expected to analytically review a recommended journal article listed on this syllabus. The paper should be critical, analytical and concise, as well as demonstrate an ability to apply the major concepts, theories, and methods of strategic planning to the article you are reviewing.
The paper should be 4 pages long, double spaced and be submitted along with a copy of the article being reviewed. Additionally, properly cite your sources using the APA style for citations and referencing.

Evaluation of an Existing Strategic Plan (20%)

Chose an existing Strategic Plan from a public or non-profit entity and do a critical analysis of that plan, including organizational history and profile, expected strategic outcomes, your personal assessment of what successful and/or unsuccessful strategic planning practices were involved, and your suggestions for improving the development and implementation of that plan. The evaluation should be a double-spaced 6 - 8 page report that properly cites your sources and uses the APA style for citations and referencing.

Develop a Strategic Plan Proposal (10%)

You will select a public or non-profit organization with a real-world need for a new or revised strategic plan and write a double-spaced, 4-6 page proposal for that strategic plan. Prior to producing this assignment you need to get instructor sign off on the organization you have selected. In this assignment you will detail the organizational need for the strategic plan and will present your methodology for developing the plan, as well as an outline of your proposed strategic plan. The strategic plan proposal should include organizational history and profile, mission and value statements, as well as strategic issues. A & K Appendix A can be a helpful guide for your outline and process.

Complete a Strategic Plan (30%)

You will write a double-spaced, 10-12 page strategic plan for the agency you selected (12 font, one-inch margin, and Times New Roman). You will use the theoretical arguments, perspectives, analyses, methods, implications and suggestions found in the required readings. Try to be both realistic and constructive; go for the feasible, not merely the desirable. This requires tight, lean sentence construction; each sentence makes a point. There is no room for expansive narrative that goes on for pages. The format is as follows: a title page with your name, text organized around steps in the strategic planning process as outlined in the required readings (use appropriate subtitles in the text), and references. The paper should be spell-checked and free of grammatical errors. Also, the paper should have at least 4 outside scholarly sources (i.e., references), including books, journals, magazines, and newspapers, in addition to interview material from the staff at and clients of your selected agency. At least 50 percent of your scholarly references must be from a source other than the Internet.

Academic Dishonesty

All forms of academic dishonesty will not be tolerated in this class. This includes, but is not limited to handing in another’s work as your own, using unauthorized notes in an exam, copying another’s answers for an exam, turning in the same papers for two different classes, purchasing or otherwise obtaining papers written by another and turning that work in as your own. It is expected that ideas and information used in your work, which are not part of your personal experience, will be appropriately referenced (seek help if you do not know how to reference your sources; I can help you, and there are other resources available on campus.) If academic
dishonesty is suspected, I will follow the disciplinary guidelines in the TAMUCC student code of conduct.

**Academic Advising**

The College of Liberal Arts requires that students meet with an Academic Advisor as soon as they are ready to declare a major. The Academic Advisor will set up a degree plan, which must be signed by the student, a faculty mentor, and the department chair. The College’s Academic Advising Center is located at Driftwood 203E and can be reached at 825-3466.

**Students with Disabilities**

Texas A&M University-Corpus Christi complies with the Americans with Disabilities Act in making reasonable accommodations for qualified students with disabilities. If you suspect that you may have a disability (physical impairment, learning disability, psychiatric disability, etc.), please contact the Services for Students with Disabilities Office, located in Driftwood 101, at 825-5816. If you need disability accommodations in this class, please see me as soon as possible.

**Grade Appeal Process**

As stated in University Rule 13.02.99.C2, Student Grade Appeals, a student who believes that he or she has not been held to appropriate academic standards as outlined in the class syllabus, equitable evaluation procedures, or appropriate grading, may appeal the final grade given in the course. The burden of proof is upon the student to demonstrate the appropriateness of the appeal. A student with a complaint about a grade is encouraged to first discuss the matter with the instructor. For complete details, including the responsibilities of the parties involved in the process and the number of days allowed for completing the steps in the process, see University Rule 13.02.99.C2, Student Grade Appeals, and University Procedure 13.02.99.C2.01, Student Grade Appeal Procedures. These documents are accessible through the University Rules Web site at [http://www.tamucc.edu/provost/university_rules/index.html](http://www.tamucc.edu/provost/university_rules/index.html). For assistance and/or guidance in the grade appeal process, students may contact the Office of Student Affairs.
Course Schedule
PADM 5360 Strategic Planning

Note: This calendar is tentative and subject to change due to availability of subject-expert guest speakers. I will notify you in advance of any changes.

8/28: Introductions and Overview of Course

9/4: Introduction to Strategic Planning

A & K, Ch 1 (p. 1-14)
Bryson, Ch 1

Recommended additional reading:
Gordon, Ch 1

Overview of strategic planning. Review definitions, purposes, characteristics, benefits and the differences between strategic planning vs. operational planning.

9/11: Strategic Planning Process

A & K, Ch 1 (p. 14-30)
Bryson, Ch 2

Recommended additional reading:
Gordon, Ch 2, 3
Rabin, Ch 2, 7

Strategic decision-making models. Steps in strategic planning.

9/18: Getting Ready: Initiating and Agreeing on a Strategic Planning Process

A & K, Ch 2
Bryson, Ch 3

Recommended additional reading:
Gordon, Ch 4

Why, when, what, and how to plan? Internal and external stakeholders. Approach to the strategic planning process.

9/25: Clarifying Organizational Mission, Vision, Values, and Mandates

A & K, Ch 3
Bryson, Ch 4

Article Review Due on 9/25

10/2: Assessing the External and Internal Environments/Situations

A & K, Ch 4
Bryson, Ch 5 & Appendix A

Recommended additional reading:
Gordon, Ch 6
Rabin, Ch 34

Examine external, internal, and management environments through a SWOT analysis. Identifying and gathering information/data from internal and external stakeholders. Objective vs. subjective data.

10/9: Techniques and Tools for Managing Group Dynamics and Stakeholder Processes

A & K, Appendix F, G, H, J
Bryson, Appendix C

Conducting focus groups. Strategic planning in collaborative settings. Tips on using task forces. Process recommendations and suggested questions for external stakeholders.

10/16: Identifying the Strategic Issues Facing the Organization

A & K, Appendix E
Bryson, Ch 6 & Appendix B

Recommended additional reading:

Client needs assessment. Types of issues. Description of strategic issues. Approaches to identifying strategic issues and formulating effective strategies. How strategic is the issue?
10/23: Formulating and Adopting Strategies to Manage the Issues

A & K, Ch 5
Bryson, Ch 7

Recommended additional reading:
Gordon, Ch 9

**Strategy formulation, development and adoption. Typology of public sector strategies. Different levels of strategies. Criteria for evaluating strategies.**

**Evaluation of Existing Strategic Plan Due 10/23**

10/30: Developing a Vision for the Futures and Establishing Program Goals and Objectives, as well as Financial and Administrative Goals and Objectives.

A & K, Ch 6 (p.235 -249)
Bryson, Ch 8

Recommended additional reading:
Gordon, Ch 7, 8, 12
Rabin, Ch 17 & 26

**Program visions, goals and objectives. Building measurable objectives. Long-range financial projections. Estimation of overall expenses and cost analysis.**

11/6: Leadership Roles for Making Strategic Planning Work

A & K, Appendix C & Appendix D
Bryson, Ch 11

*Understanding the context and the people involved. Championing and facilitating the process. Collective leadership. Making decisions and managing conflict.*

11/13: Getting Started, Writing and Adopting the Strategic Plan

A & K, Ch 6 (p.249-286) & Appendix B
Bryson, Ch 12

Recommended additional reading:
Gordon, Ch 10
Rabin, Ch 32
Identifying writers and reviewers of the plan. What to include in the strategic plan? Alternative strategic plan formats. Contents of the strategic plan. Adopting and sharing the plan. Obstacles.

**Strategic Plan Proposal Due 11/13: (A & K Appendix A can be a helpful resource)**

11/20: Implementing the Strategic Plan

A & K, Ch 7 & Appendix I
Bryson, Ch 9

**Recommended additional reading:**
Rabin, Ch 8

**Templates for developing strategic and annual operating (work) plans. Managing the transition. What makes an effective operational plan? Considerations for effective implementation, including factors contributing to implementation success or failure.**

11/27: Evaluating, Monitoring and Revising the Strategic Plan

A & K, Ch 8
Bryson, Ch 10

**Recommended additional reading:**
Gordon, Ch 11

*Evaluation of the strategic plan and the planning process. Assessing progress toward the achievement of the goals. Monitoring and updating the strategic plan.*

12/4: Wrap Up & Final Class

**12/7: Strategic Plan Due On or Before 12/7**