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. A strategic plan is a road map to get to where an organization wants to go. Making strategic planning 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. Consider strategic planning as a process for implementing strategic management.

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 a 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.

Course Requirements

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:

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<tr>
<th>Assignment</th>
<th>Percent</th>
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<tr>
<td>Attendance and Participation</td>
<td>15%</td>
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<tr>
<td>Article or Case Study Review and Presentation (Due as Assigned)</td>
<td>20%</td>
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<tr>
<td>Evaluation of an Existing Public or Non Profit Strategic Plan (Due 11/5)</td>
<td>20%</td>
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<tr>
<td>Develop a Public or Non Profit Strategic Plan Proposal (Due 10/15)</td>
<td>15%</td>
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<tr>
<td>Complete a Public or Non Profit Strategic Plan (Due 12/8)</td>
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Case Study or Article Review and Presentation (20%) & Due as Assigned

You are expected to analytically review a journal article related to strategic planning, such as process models, tools, techniques, theory or case study experiences. 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.
Also you are required to present your article or case study review in class using a PowerPoint presentation. Provide a class handout. Each student will sign up for a class date to give this 15 minute presentation with 5 - 10 minutes facilitated classroom discussion. You will sign up in class for your presentation date. Appendix K in your textbook offers some suggested articles, but you will need to sign up for your selected article to avoid multiple presentations on the same article.

Evaluation of an Existing Strategic Plan (20%) & Due 11/5th

Chose an **existing** Strategic Plan preferably 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 (15%) & Proposal Due 10/15th

The development of a strategic plan based on an assigned mock organization is a group project. Your team will write a double-spaced, 4 - 6 page proposal for developing that strategic plan. In this assignment you will detail the organizational need for the strategic plan, do a preliminary analysis of the SWOT and strategic issues, 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 proposal.**

Complete a Strategic Plan (30%) & Due 12/3rd

Your team will write a double-spaced, 10-12 page strategic plan for the mock agency you were assigned (12 font, one-inch margin, and Times New Roman). Your final plan should address the SWOT and strategic issues for your assigned mock organization. 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, table of contents, text organized around steps in the strategic planning process as outlined in the required readings (use appropriate subtitles in the text), and references. The strategic plan should be spell-checked and free of grammatical errors. Also, the strategic plan should include mock interview material from the staff at and clients of your assigned agency.

**Required Texts**

The textbook is 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 or Supplemental Reading: Books**

Recommended or Supplemental Reading: Journal Articles


Course Policies

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%

Late Work

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 can not complete the course due to circumstances beyond her/his control (as determined by the instructor.)

Attendance and Participation (15%)

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.
With **active** class participation, **1 absence or less** earns a student the full 15% for attendance and participation.

With **active** class participation, **3 absences or less** earns a student 10% for attendance and participation.

**Four absences** earns a student a zero for attendance and participation.

**Five absences will result in “F” for the entire course.**

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.

**Cell Phone and Electronic Device Usage**

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.

**Academic Integrity/Plagiarism**

University students are expected to conduct themselves in accordance with the highest standards of academic honesty. Academic misconduct for which a student is subject to penalty includes all forms of cheating, such as illicit possession of examinations or examination materials, falsification, forgery, complicity or plagiarism. (Plagiarism is the presentation of the work of another as one’s own work.) In this class I will follow the disciplinary guidelines in the TAMUCC student code of conduct for academic misconduct or complicity in an act of academic misconduct on an assignment or test.

**Dropping a Class**

I hope that you never find it necessary to drop this or any other class. However, events can sometimes occur that make dropping a course necessary or wise. Please consult with me before you decide to drop to be sure it is the best thing to do. Should dropping the course be the best course of action, you must initiate the process to drop the course by going to the Student Services Center and filling out a course drop form. Just stopping attendance and participation WILL NOT automatically result in your being dropped from the class. November 7th is the last day to drop a class with an automatic grade of “W” this term.

**Preferred Methods of Scholarly Citations**

Use the APA style for citations and references.

**Classroom/professional behavior**

Texas A&M University-Corpus Christi, as an academic community, requires that each individual respect the needs of others to study and learn in a peaceful atmosphere. Under Article III of the Student Code of Conduct, classroom behavior that interferes with either (a) the instructor's ability to conduct the class or (b) the ability of other students to profit from the instructional program may be considered a breach of the peace and is subject to disciplinary sanction outlined in article VII of the Student Code of Conduct.
Students engaging in unacceptable behavior may be instructed to leave the classroom. This prohibition applies to all instructional forums, including classrooms, electronic classrooms, labs, discussion groups, field trips, etc.

**Statement of Civility**

Texas A&M University-Corpus Christi has a diverse student population that represents the population of the state. Our goal is to provide you with a high quality educational experience that is free from repression. You are responsible for following the rules of the University, city, state and federal government. We expect that you will behave in a manner that is dignified, respectful and courteous to all people, regardless of sex, ethnic/racial origin, religious background, sexual orientation or disability. Behaviors that infringe on the rights of another individual will not be tolerated.

**Grade Appeals**

Students who feel they have 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. A student with a complaint about a grade is encouraged to first discuss the matter with the instructor. For complete details on the process of submitting a formal grade appeal, please visit the College of Liberal Arts website (http://cla.tamucc.edu/about/student-resources.html). For assistance and/or guidance in the grade appeal process, students may contact the Associate Dean.

**Disabilities Accommodations**

The Americans with Disabilities Act (ADA) is a federal anti-discrimination statute that provides comprehensive civil rights protection for persons with disabilities. Among other things, this legislation requires that all students with disabilities be guaranteed a learning environment that provides for reasonable accommodation of their disabilities. If you believe you have a disability requiring an accommodation, please call or visit Disability Services at (361) 825-5816 in Corpus Christi Hall 116.

If you are a returning veteran and are experiencing cognitive and/or physical access issues in the classroom or on campus, please contact the Disability Services office for assistance at (361) 825-5816.

**Statement of Academic Continuity**

In the event of an unforeseen adverse event, such as a major hurricane and classes could not be held on the campus of Texas A&M University–Corpus Christi; this course would continue through the use of Blackboard and/or email. In addition, the syllabus and class activities may be modified to allow continuation of the course. Ideally, University facilities (i.e., emails, web sites, and Blackboard) will be operational within two days of the closing of the physical campus. However, students need to make certain that the course instructor has a primary and a secondary means of contacting each student.

**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. Degree plans are prepared in the CLA Academic Advising Center. The University uses an online Degree Audit system. Any amendment must be approved by the Department Chair and the Office of the Dean. All courses and requirements specified in the final degree plan audit must be completed before a degree will be granted. The CLA Academic Advising Office is located in Driftwood #203. For more information please call (361) 825-3466.
8/25: Introductions and Overview of Course; Introduction to Strategic Planning

Class introductions. Overview of strategic planning. Review syllabus and course outline.

9/1: Strategic Planning Process

A & K, Ch 1

Strategic Planning 1-0-1: Review definitions, purposes, characteristics, benefits and the differences between strategic planning vs. operational planning. Discuss strategic decision-making models. Review outline of the nine steps in strategic planning.

9/8: Step One is Getting Ready: Initiating and Agreeing on a Strategic Planning Process

A & K, Ch 2

Student Presentations

Why, when, what, and how to plan? Identifying internal and external stakeholders. Approaches to the strategic planning process.

9/15: Step Two is Clarifying Organizational Mission, Vision, Values, and Mandates.

A & K, Ch 3

Student Presentations


9/22: Step Three is Assessing the External and Internal Environments/Situations.

A & K, Ch 4

Student Presentations

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

9/29: Techniques and Tools for Managing Group Dynamics and Stakeholder Processes

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

Student Presentations

Conducting focus groups. Strategic planning in collaborative settings. Tips on using task forces. Defining consensus and how to reach agreement. Process recommendations and suggested questions for external stakeholders.

10/6: Step Four is Revisiting Mission, Vision & Values. Step Five is Identifying the Strategic Issues Facing the Organization and Agreeing on Priorities (The Vital Few)

A & K, Ch 5 & Appendix E

Student Presentations

Client needs assessment. Description of strategic planning issues. Approaches to identifying strategic issues and formulating effective strategies. How strategic is the issue?

10/13: Step Six is Formulating and Adopting Strategies to Manage the Issues. Strategic Plan Proposal Due Today: (A & K Appendix A can be a helpful resource)

A & K, Ch 5
**Student Presentations**


10/20: Complete Step Six by Developing a Vision for the Future. Establish Program Goals and Objectives, as well as Financial and Administrative Goals and Objectives.

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

**Student Presentations**


10/27: Assessing Organizational and Leadership Capacity. Leadership Roles for Making Strategic Planning Work

A & K, Appendix C & Appendix D

**Student Presentations**

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

11/3: Step Seven is Writing and Adopting the Strategic Plan. **Evaluation of Existing Strategic Plan Due Today**

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

**Student Presentations**

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.

11/10: Step Eight is Implementing the Strategic Plan

A & K, Ch 7 & Appendix I

**Student Presentations**

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.

11/17: Step Nine is Evaluating, Monitoring and Revising the Strategic Plan

A & K, Ch 8

**Student Presentations**

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

11/24: Thanksgiving Holiday – No class this day

12/1: Class Recap and Preparation for Final – Outside Speaker on Corpus Christi Comprehensive Plan 2030

12/8: Strategic Plan Final Due