SYLLABUS
CPH ENTR 415/515: Strategic Planning
Fall 2015

Time: Single, 3 hr lecture per week

Location: Drachman A116 (Thursdays 2:00-4:50 PM)

Instructor: Ernest P. (Ernie) Schloss, PhD
A219Q Drachman Hall
schloss1@email.arizona.edu
(520) 626-3591

TA: Ali Gabriel, MA, MPH, CPH
Doctoral Student, PHPM
aliali28@mac.com

Office Hours: By appointment

Catalog Description: This course provides an overview and applications of strategic planning theories, methods, and group processes in different organizational environments.

Course Description: This is a team-based course in which students will learn how to conduct strategic planning-related activities as part of a diverse team. As a result, much attention will be placed on understanding and practicing various group facilitation tools and techniques often used in strategic planning. Each class will involve working on case examples, as well as analyzing various components of a strategic plan. In addition, students will work individually and collaboratively on online (D2L) assignments before each class. Each team’s final class project will be a presentation about the strategic planning process and products developed by an organization in the community.

Course Credit: 3 units

Course Prerequisites:

- Undergraduate Students: Senior in public health, public administration, or business administration or permission of the instructor.

- Graduate Students: Successful completion of CPH 574 or permission of instructor

Course Learning Objectives (for both undergraduate and graduate students): Upon completion of this course students will be able to:

- Describe and critically analyze strategic planning theories and methodologies.
- Critically analyze a strategic plan
- Understand the appropriate use of group facilitation processes for strategic planning
- Conduct an organizational and environmental assessment
- Develop forecasts and scenarios
- Develop mission, vision, and values statements
- Develop strategies to achieve the vision

**MPH, Public Health Policy & Management, and Interprofessional Competencies Covered:**

(See Appendix A)

**Course Notes:** Reading assignments and course materials will be made available on the course web-site at http://d2l.arizona.edu/.

**Required Texts:**


*Harvard Business Review* bundle available through Class Notes at UA Bookstore:


**Additional required content materials:** Each week additional required readings, in the form of articles and case studies, will be posted on the D2L website.

**Course Format:** Course content will come from required texts, articles, and other materials that will be posted on the D2L course website. Each student is responsible for reviewing these materials.

The course uses **team-based learning**, which requires active participation inside and outside of class. Students will be assigned to a small (5-7 people) team during the first class (undergraduate and graduate students may be assigned to integrated teams or teams of their peers, depending upon the composition of the class). Students will work in that team throughout the semester. Planning professionals usually work in and facilitate groups, teams, and coalitions; this class will help students develop needed skills.

**D2L Online Discussion Board** – This course uses D2L’s online discussion board. Every student is expected to contribute to it as assigned, with all comments posted before the deadlines.

**Course Requirements & Grading/Student Evaluation for Graduate Students:**

**Individual Quiz (10%):** Each week there will be an individual and team closed-book quiz about the readings for the week. The grading for the quiz will be pass/fail, based on the team quiz results.

**Peer Reviewed Group Work (20%):** Each week will include a small-group/team assignment. Each student will be graded on his or her group participation by their teammates. Team members will anonymously evaluate each other’s contributions to team functioning at the end of the semester using a standard form to make written comments and award a numerical grade. There will be a practice review mid-semester that will not affect peer review grades, but will give students some feedback on their team performance.
Students grade each other based on four criteria – preparation, contribution, respect for others’ ideas, and flexibility.

- Preparation- Where they prepared when they came to class?
- Contribution- Did they contribute productively to group discussion and work?
- Respect for others’ ideas- Did they encourage others to contribute to their ideas?
- Flexibility- Were they flexible when disagreements occurred?

D2L Online Discussion Board (20%): The D2L online discussion board instructions and rubric are contained in Appendix B.

Strategic Plan Analysis and Suggestions for Improvement Presentation (30%): Student teams will be assigned to interview a person responsible for strategic planning in an organization and review and analyze the organization’s strategic plan, as well as the process used to develop it. During the final class each team will provide a 15 minute presentation of its strategic plan analyses.

Facilitation Reflection Paper (20%): As a final class project, each graduate student will be required to write a 10-page paper describing his or her analysis of the process of being a small group facilitator for the semester. Papers are to be completed by the last day of class.

Course Requirements & Grading/Student Evaluation for Undergraduate Students:

Individual Quiz (10%): Each week there will be an individual and team closed-book quiz about the readings for the week. The grading for the quiz will be pass/fail, based on the team quiz results.

Peer Reviewed Group Work (20%): Each week will include a small-group/team assignment. Each student will be graded on his or her group participation by their teammates. Team members will anonymously evaluate each other’s contributions to team functioning at the end of the semester using a standard form to make written comments and award a numerical grade. There will be a practice review mid-semester that will not affect peer review grades, but will give students some feedback on their team performance. Students grade each other based on four criteria – preparation, contribution, respect for others’ ideas, and flexibility.

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Midterm Examination (10%): Undergraduate students will have a take home midterm exam, at a time to be scheduled.
Final Examination (10%): Undergraduate students will have a take home final exam, to be completed by the last day of class.

The grading scale for all students (graduate and undergraduate) will be as follows:

A=90-100% of total points  
B=80-89% of total points  
C=70-79% of total points  
D=60-69% of total points  
E= <60% of total points

Other Grading/Participation Considerations:

Missing or late assignments: Missing assignments will receive 0 grade points for the entire assignment. One-half of the total possible points for the assignment will be deducted for late assignments.

Extra credit: Periodically, the instructor may offer additional assignments (e.g., participating in formal interprofessional learning activities) for extra credit. Extra credit may be used to substitute for missing or late assignments, or to enhance the student’s grade.

Academic misconduct: Any academic misconduct (see Academic Integrity statement below) will result in 0 points for the assignment.

Class attendance/participation: Attendance is expected for each class, as team participation is required to complete in-class assignments. Each student is allowed one absence without penalty, provided the student notifies the instructor and/or TA and his or her team members; however, all online and in-class assignments must be completed, or the absent student will receive no grade credit for the assignments. More than one unexcused absence will result in a loss of two (2) percentage grade points per missed class from the overall course grade.

All holidays or special events observed by organized religions will be honored for those students who show affiliation with that particular religion. Absences pre-approved by the UA Dean of Students (or Dean’s designee will be honored.)
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<tr>
<th>Week</th>
<th>Topic</th>
<th>Readings (Prior to Class)</th>
<th>Class Activities</th>
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<tbody>
<tr>
<td>0</td>
<td>Pre-Course Introductions</td>
<td>Baldwin, Bommer &amp; Rubin (pp.340-375—35 pg.)</td>
<td>• Cain Introvert/Extrovert test</td>
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| 1 (8/27) | Course Overview: Team Development                   | Cooperrider & Whitney (pp. 73-88—16 pg.)                                                   | • Creativity Exercise  
• Time Orientation  
• Multiple Intelligences  
• Appreciative Inquiry  
• Myers-Briggs Type |
| 2 (9/3) | Teams/Facilitation                                  | Online Strategic Planning Module in AzTRAIN (1 Hr.)                                       | • Ali Gabriel, MEZCOPH  
• Facilitation Exercises                                                        |
| 3 (9/10) | Some Theories of Organizational Change & Strategic Planning | Bryson, Ch. 1 (pp. 3-38, 38-40—27 pg.); Land & Jarman (pp. 250-266—16 pg.)               | • Ali Gabriel, MEZCOPH  
• Facilitation Exercises                                                        |
| 4 (9/17) | Strategic Planning in Simple Contexts               | Bryson, Ch. 2 (pp. 41-80—40 pg.)                                                       | • Review Example Plans                                                            |
| 5 (9/24) | Mission, Vision and Values                          | Bryson, Ch. 4, 8 (pp. 117-143, 271-277, 280-285—38 pg.)                                | • Strategic Visioning                                                             |
| 6 (10/1) | Environmental Scanning – Forecasting/Foresight      | Saffo (pp. 122-131—9 pg.); Randers (pp. 2-15—13 pp.); Schloss, 1988 (pp.920-922—3 pg.); Projecting the Supply and Demand… (pp.1-5—5 pg.) | • Projections & Forecasting                                                       |
| 7 (10/8) | Environmental Scanning – Opportunities and Challenges (Threats) | Bryson, Ch. 5 (pp. 150-166—16 pg.); Marion (pp. 94-98—4 pg.); Howe & Strauss (pp. 41-52—11 pg.) | • Opportunity/Challenges analyses  
• Market analysis                                                                  |
| 8 (10/15) | Environmental Scanning – Strengths, Weaknesses,     | Bryson, Ch. 5 (pp.166-172; 180-184—10 pg.)                                               | • Strengths & Weaknesses analyses                                                  |
| 9 (10/22) | Strategic Issues/Strategy Development               | Bryson, Ch. 6 (pp.185-190, 194-218—20 pg.); Emery & Devane (pp. 347-364—17 pg.); Weisbord & Janoff (pp.317-330—13 pg.); Parsons & Warner-Robbins (40-49—9 pg.) | • Search Conference  
• Future Search                                                                   |
| 10 (10/29) | Goals, Objectives, Measurement Issues & Evaluation  | Bryson, Ch. 7 (pp. 219-245, 255-270—41 pg.)                                             | • Goals and Objectives                                                           |
| 11 (11/5) | Strategic Planning in Complicated Contexts          | Ogilvy & Schwartz (pp. 1-18—18 pg.); New Aging (pp. 27-30—4 pg.); Snowden & Boone (pp. 69-76—8 pg.) | • Scenario Planning                                                              |
| 12 (11/12) | Strategic Planning in Complex Contexts              | Conklin (pp.1-20—20 pg.); Owen (pp.135-148—14 pg.)                                       | • Open Space Technology  
• Dialogue Mapping                                                                  |
| 14 (12/3) | Strategic Plan Analyses Presentations, Course Evaluation | (Final Report Preparation)                                                            | • Presentations                                                                 |

**Course Schedule:**
Required Statements:

Communications:  You are responsible for reading emails sent to your UA account from your
professor and the announcements that are placed on the course web site (D2L). Information about
readings, news events, your grades, assignments and other course related topics will be
communicated to you with these electronic methods. The official policy can be found at:
http://www.registrar.arizona.edu/emailpolicy.htm

Disability Accommodation:  If you anticipate issues related to the format or requirements of
this course, please meet with me.  I would like us to discuss ways to ensure your full
participation in the course.  If you determine that formal, disability-related accommodations
are necessary, it is very important that you be registered with Disability Resources (621-
3268; drc.arizona.edu) and notify me of your eligibility for reasonable accommodations.  We
can then plan how best to coordinate your accommodations. The official policy can be
found at: http://catalog.arizona.edu/2014%2D15/policies/disability.htm

Academic Integrity:  All UA students are responsible for upholding the University of Arizona Code
of Academic Integrity, available through the office of the Dean of Students and online: The official
policy found at: http://deanofstudents.arizona.edu/codeofacademicintegrity

Classroom Behavior: (Statement of expected behavior and respectful exchange of ideas)
The Dean of Students has set up expected standards for student behaviors and has defined and
identified what is disruptive and threatening behavior. This information is available at:
http://deanofstudents.arizona.edu/disruptiveandthreateningstudentguidelines

Students are expected to be familiar with the UA Policy on Disruptive and Threatening Student
Behavior in an Instructional Setting found at:
http://policy.arizona.edu/disruptive-behavior-instructional and the Policy on Threatening Behavior
by Students found at:

Grievance Policy:  Should a student feel he or she has been treated unfairly, there are a number
of resources available. With few exceptions, students should first attempt to resolve difficulties
informally by bringing those concerns directly to the person responsible for the action, or with the
student’s graduate advisor, Assistant Dean for Student and Alumni Affairs, department head, or the
immediate supervisor of the person responsible for the action. If the problem cannot be resolved
informally, the student may file a formal grievance using the Graduate College Grievance Policy
found at: http://grad.arizona.edu/academics/policies/academic-policies/grievance-policy

Grade Appeal Policy:  http://catalog.arizona.edu/2014-15/policies/gradappeal.htm

UA Smoking and Tobacco Policy:
The University’s "Smoking and Tobacco Policy" is designed to promote the health and wellness of
all members of the University community, including visitors to campus, and it will prohibit the use of
tobacco- and nicotine-containing products on property owned or controlled by the UA. This includes
the main campus, the Arizona Health Sciences Center, the Phoenix Biomedical Campus, UA South,
all satellite campuses, University vehicles, and any property leased by the UA. Smoking cessation
aids, such as nicotine gum, patches, and nasal sprays, will be permitted, but all other forms of
tobacco or nicotine - including pipes, cigars, cigarettes and e-cigarettes, all types of smokeless
tobacco, and water pipes - will be prohibited.  The latest version of the policy is available at:
http://policy.arizona.edu/sites/default/files/Tobacco-Free.pdf
Syllabus Changes: Information contained in the course syllabus, other than the grade and absence policies, may be subject to change with reasonable advance notice, as deemed appropriate.

Telephone and Computer Use: Turn your cell phones to silent or vibrate in order to not disrupt the class and disturb your fellow students and professor. We will often use materials posted on D2L or from the Web in class, so please bring an Internet-enabled computer or tablet (e.g., iPad) to class; however, you are not allowed to use your computer or phone for any non-class related activities during class.

Plagiarism: What counts as plagiarism?
- Copying and pasting information from a web site or another source, and then revising it so that it sounds like your original idea.
- Doing an assignment/essay/take home test with a friend and then handing in separate assignments that contain the same ideas, language, phrases, etc.
- Quoting a passage without quotation marks or citations, so that it looks like your own.
- Paraphrasing a passage without citing it, so that it looks like your own.
- Hiring another person to do your work for you, or purchasing a paper through any of the on- or off-line sources.
Appendix A
MPH and Interprofessional Competencies

MPH Competencies Covered:

Analytical Skills
- Defines a problem
- Determines appropriate uses and limitations of data
- Evaluates the integrity and comparability of data and identifies gaps in data sources
- Makes relevant inferences from data

Communication Skills
- Communicates effectively both in writing and orally (unless a handicap precludes one of these forms of communication
- Soliciting input from individuals and organizations
- Leading and participating in groups to address specific issues, including ability to work in teams, span organizational boundaries, and cross systems
- Demonstrating cultural competency in all of the above and community development

Policy Development/Program Planning Skills
- Assess and interpret information to develop relevant policy options
- States policy options and writes clear and concise policy statements
- Translates policy into organizational plans, structures, and programs

Cultural Skills
- Interacting competently, respectfully, and professionally with persons from diverse backgrounds

Financial Planning and Management Skills
- Developing strategies for determining priorities
- Applying basic human relations skills to the management of organizations and the resolution of conflicts
- Managing personnel
- Understanding the theory of organizational structure and its relation to professional practice

Public Health Policy and Management Competencies Covered:

- Apply the principles of program planning, development, budgeting, management and evaluation in organizational and community initiatives.
- Apply principles of strategic planning and marketing to public health.
- Apply "systems thinking" for resolving organizational problems.
- Communicate health policy and management issues using appropriate channels and technologies.
- Demonstrate leadership skills for building partnerships.

Interprofessional Competencies Covered:

Communication Competencies:
• Choose effective communication tools and techniques, including information systems and communication technologies, to facilitate discussions and interactions that enhance team function.
• Listen actively, and encourage ideas and opinions of other team members.
• Give timely, sensitive, instructive feedback to others about their performance on the team, responding respectfully as a team member to feedback from others.
• Use respectful language appropriate for a given difficult situation, crucial conversation, or interprofessional conflict.
• Recognize how one’s own uniqueness, including experience level, expertise, culture, power, and hierarchy within the healthcare team, contributes to effective communication, conflict resolution, and positive interprofessional working relationships (University of Toronto, 2008).

Roles/Responsibilities Competencies:
• Engage in continuous professional and interprofessional development to enhance team performance.

Team and Teamwork Competencies:
• Describe the process of team development and the roles and practices of effective teams.
• Apply leadership practices that support collaborative practice and team effectiveness.
• Reflect on individual and team performance for individual, as well as team, performance improvement.
• Use process improvement strategies to increase the effectiveness of interprofessional teamwork and team-based care.
• Use available evidence to inform effective teamwork and team-based practices.
• Perform effectively on teams and in different team roles in a variety of settings.
Appendix B
D2L Discussion Board Instructions and Grading Rubric

In this course, you are expected to participate and interact with your classmates both in-class and online. A significant portion (20%) of your final grade will be based on your participation in weekly, online, D2L discussions. In addition to your own original responses, you are required to comment on the postings of at least two of your classmates each week. Your postings may be brief, but need to substantively contribute to the topic under discussion and reflect the quality of discourse characteristic of a professional level seminar. All of your postings should be well-informed, respectful, and original.

- A well-informed posting requires that you have: (1) completed all readings and viewed all media; (2) conducted any necessary independent research; (3) carefully reviewed and considered the discussion question(s) before posting your own comments; and (4) carefully read other students’ postings before commenting on them.
- A well-informed posting responds to the question(s) asked, demonstrates understanding of the questions(s), materials, and (when commenting) other responses; discusses relevant issues; and introduces cited information from additional credible sources where required or appropriate. Wikipedia and similar sources will not be counted as references. Use instead peer-reviewed journals; books; national newspapers or magazines; national, state or local public health agencies; national non-governmental public health agencies and foundations; etc.
- Respectful means that you avoid rude, condescending, disparaging, or obscene communication.
- Original means that you are: (1) expressing your own ideas in your own words, (2) appropriately crediting original sources when you are not, and (3) adhering to the University Code of Academic Integrity.

The following rubric will be used for grading:

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<th>Excellent (4 pts)</th>
<th>Good (3 pts)</th>
<th>Fair (2 pts)</th>
<th>Poor (1 pts)</th>
<th>None (0 pts)</th>
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<tbody>
<tr>
<td>Content</td>
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<td>Ideas/Organization</td>
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<td>TOTAL (a+b+c / n postings required)</td>
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- Content – Content demonstrates understanding of materials and responds to question(s) asked
- Ideas/Organization – Thoughts, ideas and recommendations are clear, interesting, persuasive, and – wherever possible – based on available scientific evidence. Content is organized in a manner that allows reader/listener to easily follow and understand.
- Writing—adhere to writing conventions (e.g., spelling, grammar, punctuation, capitalization, and paragraphing)