SYLLABUS
PHPM ENTR 415/515: Strategic Planning
Fall 2017
October 5, 2017

Time: Single, 3 hr lecture per week

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

Instructor: Ernest P. (Ernie) Schloss, PhD
A-219Q Drachman Hall
schloss1@email.arizona.edu

TA: TBD

Instructor Availability: By appointment (Please email)

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 PHPM (old 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 and Public Health Policy & Management 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/.


The textbook is available electronically through the University Libraries. You may go to the library to find the book, or go http://sabio.library.arizona.edu/record=b7581607~S9. Due to licensing agreements with each publisher there may be limited access to the e-book when multiple users try to access it at any given time. Please plan accordingly.

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.

Course Requirements & Grading/Student Evaluation for All Students:

Class Attendance/ Absence Policy: Students are expected to attend every class and to notify the TA(s) and instructor when they are unable to attend. There is no make-up work for the first absence, though students are required to complete and turn in any written at-home assignments due for that class. Subsequent absences must be cleared with the instructor and students will need to complete make-up papers. Paper grades will substituted for team quiz grades for every missed class after the first. Because important aspects of team-based learning and case study learning occur in class; multiple absences may result in a lowered grade or even an incomplete.

Holidays or special events observed by organized religions will be honored for those students who show affiliation with that particular religion with the same make-up requirements mentioned above. Absences pre-approved by the UA Dean of Students or designee will be honored.
Participation and Expectations: Complete required readings and assignments prior to each class.

- Attend class and actively participate in class and online discussions.
- Think analytically
- Be open to new ideas
- Focus on the readings and issues that we are discussing.
- Avoid rambling or monopolizing discussions
- Be courteous in your critiques and disagreements. Refrain from rudeness and personal attacks
- Actively contribute to team activities in class, including team assignments and presentations

Team Work: This course uses team-based learning, which requires your active participation inside and outside of class. Typical in-class activities include team assignments, oral team reports and presentations, full class discussions, and individual or collective reflection. Students will be assigned to a small (5-7 people) team during the first class. You’ll work in that team throughout the semester. Today’s professionals usually work in groups, teams, and coalitions. This class will help you develop the needed skills. Graduate students will serve as team facilitators throughout the semester.

Readings: You are expected to attend every class and come fully prepared – i.e., having read all assigned materials and completed all assignments.

Team Questions/Quizzes: Most classes will begin with a team quiz or questions from the readings testing your shared understanding of the assigned readings. Each team member is expected to contribute to the discussion and teams are responsible for implementing a system that ensures that everyone participates.

D2L Online Discussions: This course uses D2L’s online discussion feature. Every student is expected to contribute to it as required, with all comments posted before the deadlines. Comments should be responsive to the questions posed and demonstrate that you have read, understand, and can meaningfully apply and extrapolate from the information you’ve gained. You are encouraged to introduce relevant readings that were not assigned and to share relevant knowledge and experience. Comments or replies to other postings (e.g., "I really liked chapter 4" or "I agree with what Dana wrote") are not sufficient and will receive a zero grade. Similarly, poor grammar, lack of etiquette, insensitivity, rudeness, etc., will adversely affect your grade.

Current Strategic Issues Examples: Some weeks, each team is expected to identify an example of a current issue that could affect an organization’s strategic planning. All team members are expected to have reviewed the piece and contributed to its selection. Each team’s selection will be posted on D2L, and the team members from other teams will evaluate the postings (other than their own).
Discussions Instructions and Grading Rubric:
(See Attachment B)

**Strategic Plan Analysis and Suggestions for Improvement Presentation:** Students teams will 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.

**Peer Review:** 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 four times during the semester using a standard form to make written comments and award a numerical grade. Each of the four peer reviews will count for 5% of the total grade (peer review constitutes 20% of the overall course grade), and 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?

**Grading/Student Evaluation:** 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

With team-based learning, a student’s final grade is based on his/her individual, team, and peer review grades. Individual and team grades will be awarded throughout the semester. Students who do not appear to be earning at least a “B” average for their individual performance by the middle of the term will be individually contacted by the instructor. The percentage contribution of (and in) each of the three categories to the course grade is shown below for both graduate student and undergraduate students.

**Missing or late assignments:** Missing assignments will receive 0 grade points for the entire assignment. Late assignments will result in the loss of one letter grade (10% of the total points for the assignment) for each late day. The instructor may provide additional make-up assignments to substitute for missing or late assignments. Missing or late peer reviews will result in the loss of one total peer review point per day.
**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.

**References**
- Please use the APA format. One good comprehensive source of information is Purdue's OWL (Online Writing Lab) website: http://owl.english.purdue.edu/owl/resource/560/01/
- All UA students have free access to RefWorks, EndNote, and/or Mendeley. Sign up for your free account through the UA Library website. Refworks will allow you to input all the data on your references, organize them into folders, and print bibliographies that you can copy and paste into your papers. You may still need to make some minor corrections (e.g., punctuation and/or capitalization). However, overall, it should save you a lot of time.

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

**Strategic Plan Analysis:** As a final class project, each graduate student will be required to contribute to his or her team’s strategic plan analysis, due at 11:59 PM on Monday December 4.

**Reflection Paper:** Each graduate student will complete a 10-page reflection paper. Papers are to be completed by the last day of class.

**Graduate Student Grading/Student Evaluation:** The percentage contribution of (and in) each of the three categories to the course grade is shown below.

- **Individual performance:**
  - In-class participation (attendance) 5%
  - Reflection paper 15%

- **Team performance**
  - Weekly assignments (any combination of D2L discussions, Strategic issues analyses/presentations, Quizzes, In-class exercises) 25%
  - Strategic Plan Analysis Presentation 20%
  - Team Final Strategic Plan Analysis 15%

- **Peer Review**
  - Individual contribution to team functioning (5% each for four peer reviews) 20%

**TOTAL** 100%

**Additional Course Requirements & Grading/Student Evaluation for Undergraduate Students:**

**Midterm Examination:** Undergraduate students will have a take home midterm exam, at a time to be scheduled.
**Strategic Plan Analysis:** As a final class project, each undergraduate student will be required to contribute to his or her team’s strategic plan analysis, due at 11:59 PM on Monday December 4.

**Undergraduate Grading/Student Evaluation:** The percentage contribution of (and in) each of the three categories to the course grade is shown below.

**Individual performance:**
- In-class participation (attendance) 5%
- **Take Home Midterm** 15%

**Team performance**
- Weekly assignments (any combination of D2L discussions, Strategic issues analyses/presentations, Quizzes, In-class exercises) 25%
- Strategic Plan Analysis Presentation 20%
- Team Final Strategic Plan Analysis 15%

**Peer Review**
- Individual contribution to team functioning **(5% each for four peer reviews)** 20%
- **TOTAL** 100%

**Other Grading/Participation Considerations:**

**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.

**Course Schedule:**

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<thead>
<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>
</tr>
</tbody>
</table>
| 1 (8/24) | Course Overview; Team Development | Cooperrider & Whitney (pp. 73-88—16 pg.) | • Creativity Exercise  
• Time Orientation  
• Multiple Intelligences  
• Appreciative Inquiry  
• Myers-Briggs Type |
| 2 (8/31) | Teams/Facilitation | Online Strategic Planning Module in AzTRAIN (1 Hr.); | • Facilitation Exercises  
• Team Final ProjectSelection |
<table>
<thead>
<tr>
<th>Week</th>
<th>Date</th>
<th>Topic</th>
<th>Reading</th>
<th>Activities</th>
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</table>
| 3    | 9/7  | Some Theories of Organizational Change & Strategic Planning | Bryson, Ch. 1 (pp. 3-38, 38-40—27 pg.); Land & Jarman (pp. 250-266—16 pg.) | • Facilitation Exercises  
• Peer Review 1 |
| 4    | 9/14 | Strategic Planning in Simple Contexts | Bryson, Ch. 2 (pp. 41-80—40 pg.) | • Review Example Plans |
| 5    | 9/21 | Mission, Vision and Values | Bryson, Ch. 4, 8 (pp. 117-143, 271-277, 280-285—38 pg.) | • Strategic Visioning |
| 6    | 9/28 | Environmental Scanning – Forecasting/Foresight | 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  
• Peer Review 2 |
| 7    | 10/5 | Environmental Scanning – Opportunities and Challenges (Threats) | Bryson, Ch. 5 (pp. 150-166—16 pg.); Marion (pp. 94-98—4 pg.) | • Opportunity/Challenges analyses  
• Market analysis |
| 8    | 10/12 | Environmental Scanning – Strengths, Weaknesses, | Bryson, Ch. 5 (pp. 166-172; 180-184—10 pg.) | • Strengths & Weaknesses analyses |
| 9    | 10/19 | 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  
• Peer Review 3 |
| 10   | 10/26 | Goals, Objectives, Measurement Issues & Evaluation | Bryson, Ch. 7 (pp. 219-245, 255-270—41 pg.) | • Goals and Objectives |
| 11   | 11/2 | Strategic Planning in Complicated Contexts | Ogilvy & Schwartz (pp. 1-18—18 pg.); New Aging (pp. 27-30—4 pg.) | • Scenario Planning |
| 12   | 11/9 | Strategic Planning in Complex Contexts | Conklin (pp. 1-20—20 pg.); Owen (pp. 135-148—14 pg.) | • Open Space Technology  
• Dialogue Mapping |
| 13   | 11/16 | New Directions/New Technologies | Schloss, 2014 (pp. 93-106—13 pg.) | • TBD |
| 14   | 11/30 | Strategic Plan Analyses Presentations, Course Evaluation | (Final Report Preparation) | • Presentations  
• Final Peer Review |

### Required Statements:

**Communications:**
You are responsible for reading emails sent to your UA account from your instructor and the announcements that are placed on the course web site. 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:
https://www.registrar.arizona.edu/personal-information/official-student-email-policy-use-email-official-correspondence-students

Disability Accommodations:
It is the University’s goal that learning experiences be as accessible as possible. If you anticipate or experience physical or academic barriers based on disability or pregnancy, please let me know immediately, so that we can discuss options. You are also welcome to contact the Disability Resources (520-621-3268) to establish reasonable accommodations (as it is very important that you be registered with the DRC). For additional information on Disability Resources and reasonable accommodations, please visit http://drc.arizona.edu/students

**Code of Academic Integrity**
Students are encouraged to share intellectual views and discuss freely the principles and applications of course materials. However, graded work/exercise must be the product of independent effort unless otherwise instructed. Students are expected to adhere to the UA Code of Academic Integrity, available through the office of the UA Dean Students: http://deanofstudents.arizona.edu/policies-and-codes/code-academic-integrity

Classroom Behavior: (Statement of expected behavior and respectful exchange of ideas):
Present policies to foster a positive learning environment, including use of cell phones, mobile devices, etc.).
Students are expected to be familiar with the UA Policy on Disruptive Student Behavior in an Instructional Setting found at: http://policy.arizona.edu/education-and-student-affairs/disruptive-behavior-instructional-setting

Threatening Behavior Policy:
The UA Threatening Behavior by Students Policy prohibits threats of physical harm to any member of the University community, including to one’s self, http://policy.arizona.edu/education-and-student-affairs/threatening-behavior-students

Nondiscrimination and Anti-harassment Policy:
The University of Arizona is committed to creating and maintaining an environment free of discrimination, http://policy.arizona.edu/human-resources/nondiscrimination-and-anti-harassment-policy

UA Smoking and Tobacco Policy:
The purpose of this Policy is to establish the University of Arizona’s (University) commitment to protect the health of University faculty, staff, students, and visitors on its campuses and in its vehicles, http://policy.arizona.edu/ethics-and-conduct/smoking-and-tobacco-policy

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 by the instructor.
**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
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
• Understands how the data illuminates ethical, political, scientific, economic and overall public health issues
• Makes relevant inferences from data

Communication Skills
• Communicates effectively both in writing and orally (unless a handicap precludes one of these forms of communication)
• Interpreting and presenting accurately and effectively demographic, statistical and scientific information for professional and lay audiences adapting and translating public health concepts to individuals and communities
• 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
• Developing mechanisms to monitor and evaluate programs for their effectiveness and quality

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.
Appendix B
D2L Discussions Instructions and Grading Rubric

In this course, you are expected to participate and interact with your classmates both in-class and online. 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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<tr>
<td>a. Content</td>
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<td>b. Ideas/Organization</td>
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<td>c. Writing</td>
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<td><strong>TOTAL</strong> ( a+b+c / n postings required)</td>
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</tbody>
</table>

- **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)