Time: Single, 3 hr lecture per week

Location: Drachman Hall A 120 (Thursdays 2:00-4:50 PM)

Instructor: Ernest P. (Ernie) Schloss, PhD
A237 Drachman Hall
schloss1@email.arizona.edu
(520) 626-3591

Office Hours: TBA and by appointment

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

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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

Undergraduate Competencies

• Explain basic concepts of public health administration and its affect on society.
• Write appropriately for an entry level position in the field of public health.
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/](http://d2l.arizona.edu/).

**Required Text:**


**Optional Reading:**


**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 weekly, with all comments posted before the deadlines.

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

**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 (30%): The D2L online discussion board instructions and rubric are contained in Appendix B.

Strategic Plan Analysis and Suggestions for Improvement Presentation (15%):
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.

Strategic Plan Analysis and Suggestions for Improvement Paper (35%): As a final class project, each graduate student will be required to write a 20-page paper describing his or her analysis of the strategic plan and the process used to develop it, as well as his or her suggestions for improvement. Papers are to be completed by the last day of class.

Course Requirements & Grading/Student Evaluation for Undergraduate Students:

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 (15%): Undergraduate students will have a take home midterm exam, at a time to be scheduled.

Final Examination (20%): 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

**Class Attendance/Participation:** 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.)

**Course Schedule:**

<table>
<thead>
<tr>
<th>Week</th>
<th>Topic</th>
<th>Readings (Prior to Class)</th>
<th>Class Activities</th>
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<tr>
<td>0</td>
<td>Pre-Course Introductions</td>
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</table>
| 1 (8/23) | Course Overview; Team Development                                  | Bryson, Ch. 1              | • Online Ice Breaker  
• Keirsey Type                                        |
| 2 (8/30) | Some Frameworks for Strategic Thinking; Planning Approaches in Different Contexts; | Online Strategic Planning Module in AzPHTC | • Creativity Exercise  
• Time Orientation  
• Multiple Intelligences  
• Facilitation Exercises                                 |
| 3 (9/6) | Some Theories of Organizational Change; Facilitation Roles        | Bryson, Ch. 11; (Readings to be assigned) | • Facilitation Exercises  
• Dialogue Mapping                                        |
| 4 (9/13) | Strategic Planning in Simple Contexts                             | Bryson, Ch. 2; (Readings to be assigned) | • Review Example Plans                                   |
| 5 (9/20) | Mission, Vision and Values                                      | Bryson, Ch. 4, 8; (Readings to be assigned) | • Strategic Visioning                                             |
| 6 (9/27) | Environmental Scanning – Strengths, Weaknesses,                   | Bryson, Ch. 5; (Readings to be assigned) | • Strengths & Weaknesses analyses                              |
| 7 (10/4) | Environmental Scanning – Opportunities and Challenges (Threats) | Bryson, Ch. 5; (Readings to be assigned) | • Opportunity/Challenges analyses  
• Market analysis                                              |
| 8 (10/11) | Environmental Scanning – Forecasting/Foresight                  | (Readings to be assigned) | • Forecasting                                                |
| 9 (10/18) | Strategic Issues/Strategy Development                            | Bryson, Ch. 6; (Readings to be assigned) | • Whole Scale Change  
• Search Conference  
• Future Search                                                |
<p>| 10 (10/25) | Goals, Objectives, Measurement Issues &amp; Evaluation               | Bryson, Ch. 7; (Readings to be assigned) | • Goals and Objectives                                         |
| 11 (11/1) | Strategic Planning in Complicated Contexts                       | (Readings to be assigned) | • Scenario Planning                                           |
| 12 (11/8) | Strategic Planning in Complex Contexts                           | (Readings to be assigned) | • Open Space                                                 |</p>
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<thead>
<tr>
<th>Date</th>
<th>Activity</th>
<th>Technology</th>
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<tr>
<td>13 (11/15)</td>
<td>New Directions/New Technologies</td>
<td>(Readings to be assigned)</td>
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<tr>
<td>14 (11/29)</td>
<td>Strategic Plan Analyses Presentations, Course Evaluation</td>
<td>(Final Report Preparation)</td>
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**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. 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](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/2011-12/policies/disability.htm](http://catalog.arizona.edu/2011-12/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](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](http://deanofstudents.arizona.edu/disruptiveandthreateningstudentguidelines)

Students are expected to be familiar with the UA Policy on Disruptive Behavior in an Instructional Setting found at [http://web.arizona.edu/~policy/distruptive.pdf](http://web.arizona.edu/~policy/distruptive.pdf) and the Policy on Threatening Behavior by Students found at [http://web.arizona.edu/~policy/threatening.pdf](http://web.arizona.edu/~policy/threatening.pdf)

**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](http://grad.arizona.edu/academics/policies/academic-policies/grievance-policy)

**Grade Appeal Policy:** [http://catalog.arizona.edu/2011-12/policies/gradappeal.htm](http://catalog.arizona.edu/2011-12/policies/gradappeal.htm)

**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:** Laptops are allowed and use is governed by the following University policy [Policy Title: Acceptable Use of Computers and Networks at the University of Arizona](http://web.arizona.edu/~policy/computers-policy). Turn your cell phones to silent or vibrate in order to not disrupt the class and disturb your fellow students and professor.

**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.
Attachment 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.
Attachment B  
D2L Discussion Board Instructions and Grading Rubric

In this course, students are expected to participate and interact with their classmates both in-class and online. A significant portion (30%) of the final grade will be based on participation in weekly, online, D2L discussions. In addition to students’ own original responses, everyone is required to comment on the postings of at least two classmates’ postings each week. 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 postings should be well-informed, respectful, and original.

Comments should be responsive to the questions posed and demonstrate that students have read, understand, and can meaningfully apply and extrapolate from the information they have gained. Students 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 the student’s grade.

- A well-informed posting requires that students 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 their 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 students avoid rude, condescending, disparaging, or obscene communication.

- Original means that states are: (1) expressing their own ideas in their own words, (2) appropriately crediting original sources when they are not, and (3) adhering to the University Code of Academic Integrity.

The following rubric will be used for grading:

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<tr>
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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>a. Content</td>
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<td>b. Ideas/Organization</td>
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<td>c. Conventions</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 to easily follow and understand

• **Conventions** – Adheres to writing conventions (i.e., spelling, punctuation, capitalization, grammar, and paragraphing)