Public Administration 525, section 50 (online)
Strategic Planning and Leadership

Instructor information

Gordy Pace
Email: gordy.pace@umontana.edu (If you email me I will usually respond promptly, but please allow for a 24-hour response time)
Phone: (406) 243-2371 (office); (406) 370-3075 (cell) - Please call M-F between 8-5
Office: Law School 151
Office hours: Variable. Please make an appointment

Course information

This course is online, meaning we do not meet in person. You will need to access the course through Moodle. Understanding the Moodle course site is essential to completing this class successfully so if you have questions please ask for help early.

Course materials are organized by week. Weeks run from Monday through Sunday. Each week will include a combination of a short video lecture, required readings, other online media, and discussion forums or other written assignments when applicable. I will make reading material available for future weeks, but weekly lectures will not be available until the beginning of each week.

The course will include interactive discussions that will take place in Moodle. There will also be opportunities for video conferencing either as a group or one-on-one. We will use Zoom as our conferencing tool.

Course description

This course is about strategy and leadership. In Good Strategy Bad Strategy, Richard Rumelt writes: "The core of strategy work is always the same: discovering the critical factors in a situation and designing a way of coordinating and focusing actions to deal with those factors. A leader's most important responsibility is identifying the biggest challenges to forward progress and devising a coherent approach to overcoming them."

Our exploration of strategy will consider traditional strategic planning approaches used by government and non-profit organizations juxtaposed with emerging adaptive approaches to strategy required in the "age of acceleration." You will learn to approach strategy as a design challenge. As Rumelt says, "When someone says 'Managers are decision makers,' they are not talking about master strategists, for a master strategist is a
designer." We will delve into strategic process design and explore facilitation techniques that engage stakeholders and form habits of creative and continuous strategic thinking and agility.

Our leadership examination will extend beyond the formulation of strategy and into focused and disciplined execution of organizational change. We will examine issues around organizational values, culture, structure, coordination, and communication with the goal of moving the organizations we lead from good to great.

Student learning objectives

• Understand the purpose of strategic planning in the public and nonprofit sector
• Develop knowledge of various theories and approaches to developing and executing organizational strategy
• Understand societal forces that are accelerating the pace of change and thus impacting approaches to strategy
• Advance critical and creative thinking skills and techniques
• Develop knowledge and skills for facilitating groups engaged in creative and strategic thinking
• Understand approaches to strategy execution and effective organizational change
• Apply learning through design of a strategic planning process

Course readings

Required texts


Collins, Jim. *Good To Great And The Social Sectors: A Monograph to Accompany Good to Great*

Required supplements

Additional supplemental materials will be provided in Moodle organized by week

Course expectations

Using Moodle

Since this is an online course you should check the course site once per day. If you’re new to Moodle, you should enroll in the Moodle 101 tutorial.
Weekly schedule

The course week will run from Monday-Sunday. Each week I will post a brief lecture by Sunday that introduces the topic for the week ahead and outlines learning objectives, readings, and/or media content you will be expected to view. See the detailed schedule for weekly readings and other assignments.

Grading of assignments

This is a graduate level course; students are expected to demonstrate graduate level skills in research, reading comprehension and analysis, and writing.

Strong writing skills are essential in public service work so I will grade accordingly. You will have opportunities to submit both a draft and a final paper for four different stages of your strategic plan design project. The draft will be graded primarily on the thought and organization of the paper. In grading final papers, I will consider content, organization, clarity of language, and how well you incorporated feedback.

The University of Montana Writing and Public Speaking Center is a great resource to review written assignments and readily available to best meet the needs for online and in-person students. Please set up an appointment in advance for staff to review your work before assignments are due.

Guidelines for written work

Strong writing skills are essential in public service work so I will grade accordingly. While I do not expect the same level of writing proficiency in the Moodle discussion forums as in writing submissions (forums being slightly less formal and more conversational in some instances), I do expect thoughtful, articulate, and professional posts and responses in the discussion forums. All written work must use a citation format of your choosing (e.g. MLA, APA).

Help with technology

Please make sure that your Internet browser settings meet the requirements to be Moodle compatible. Call UM Online by phone, (406) 243-4999 or email umonline-help@umontana.edu if technological problems arise. There is no on-call assistance during nights and weekends. For a total Moodle system failure, students will be sent an email by the University of Montana.

MPA portfolio

You should set aside work from MPA classes and the grade you received for the final portfolio required for completion of the MPA degree. Your portfolio must include three public administration-related research papers that are individual (not group) projects that demonstrate you ability to design, conduct, and analyze research; and evidence
of your ability to work cooperatively in a team setting, which may stem from an independent study, internship, or traditional course.

Assignments

There will be two types of assignments that will be graded for the course. One is a semester-long project that will entail designing a strategic process for an organization of your choosing. The second is leadership and participation in discussion forums. There will also be non-graded assignments, including two one-on-one conferences with the instructor.

Design a strategic planning process (240 points)

This project will challenge you to design a strategic process for a public or nonprofit organization of your choice using concepts learned from readings and discussion. The final product will be a guiding document and brief presentation.

You can complete the project individually or with a partner. We will explore collaborative options in the first couple weeks of the course.

The project will be broken into four segments with draft and rewrite deadlines spread throughout the semester as well as a final presentation. You can choose to design either a traditional planning process or an adaptive strategy process.

The four segments are:

1. Design brief (50 points)

Assignment: Write a 2-3 page double-spaced description of how you will approach your organization's strategy process. You will submit a draft and a final brief.

Draft due: Sunday, September 30 by 5 p.m.
Final due: Sunday, October 7 by 5 p.m.

The brief should address how you will assess the three fundamental questions below and explain why the process approach you recommend best fits the needs of the organization:

- The current situation. Where is the organization now?
- The desired future state. Where should the organization go?
- Plan of action. How will the organization implement or execute?

2. Current situation analysis (50 points)

Engage with your organization to understand what is going on currently. You don’t have to do a comprehensive analysis, but you should actively engage in some activity of data gathering and analysis. Example activities might include reviewing current strategic
documents and interviewing organizational leaders. In a traditional approach, you might choose to conduct a SWOT analysis (strengths, weaknesses, opportunities, threats) evaluate organizational competencies, or assess external trends. In a design thinking approach, you might conduct interviews or do journey mapping to understand the client experiences. The aim is to not just gather facts, but to produce fresh perspectives and insights by understanding what the facts mean.

Assignment: Write a 4-5 page double-spaced analysis of the current situation. You will submit a and a final paper. Your goal is to produce a simpler story about crucial aspects of what is currently going on in your organization and the environment in which it operates. You will submit a draft and a final paper.

Draft due: Sunday, October 14 by 5 p.m.
Final due: Sunday, October 21 by 5 p.m.

3. Desired future state (50 points)

The leap from current situation to desired future state will require you to engage in critical and creative thinking, ideally in collaboration with stakeholders from your organization. Depending on your approach, outcomes could include development of mission, vision and values, identification of a WIG or BHAG (Wildly Important Goal or Big Hairy Audacious Goal), and/or identification of 1-3 strategic opportunities to prototype and test.

Assignment: Write a 2-3 page double-spaced summary of the process and outcomes of your desired future state exercise(s). You will submit a draft and a final paper.

Draft due: Sunday, November 4 by 5 p.m.
Final due: Sunday, November 11 by 5 p.m.

4. Plan of action and putting it all together (90 points)

Strategy requires action. You will need to address how your organization will execute desired change. Your plan of action should include a consideration of priorities, resources (personnel and financial), timelines, coordination, and communication. If you are using a design thinking approach, you should consider how you would execute prototyping and testing stages.

Assignment: Write a 2-3 page plan of execution. You will submit a draft and a final paper. (50 points)

Draft due: Sunday, November 25 by 5 p.m.
Final due: Sunday, December 2 by 5 p.m.

Assignment: Prepare a 7-10 minute presentation summarizing your entire strategic design process to be delivered in real-time via Zoom on three separate evenings during the final week of class. (40 points)
Participate in discussion forums (60 points)

There will be five discussion forums during the semester using the Moodle discussion board. The discussions will focus on material covered during a 2-3 week period. You will be expected to facilitate discussion one time during the semester and participate in discussions the other four discussions. You will sign up for discussion facilitation in the first week of the class.

There will be three discussion leaders for each forum. You should coordinate with the other leaders before posting your question to avoid duplication. Discussion leaders should “add a new topic” to the discussion board and pose your question to the class based on readings no later than 11 p.m. on Monday.

As the discussion leader, you only manage and engage in your own topic/thread for the week. Keep the conversation going by asking additional questions.

If you are not a discussion leader, you must respond to at least two of the question threads between Tuesday and Saturday. The discussions should be ongoing and not occur all on one day. The goal is for you to post at least 5-6 total times during the week.

Evaluative criteria for discussion forums:

9-10 point range

Discussion leader(s) posts one of their own discussion question that directly relates to the reading by Monday, 11p.m. and actively engages with classmates in discussions about their question (make sure your questions are not the same as the other leaders for the week). The question presented is clearly one question, not multiple questions. The discussion leader(s) have also demonstrated preparedness by reaching out to other leaders before posting questions to avoid overlap. The discussion leader(s) does not have to respond or engage in the other questions for the week, but should oversee their own question and respond promptly in a professional manner to respondent posts. The discussion leader does not have to respond to each and every discussion post. Instead, the discussion leader thoughtfully engages across the week.

Non-discussion leaders (respondents) respond to at least two of the questions posted by the discussion leaders and actively engages with classmates in the discussion forum. These responses are clearly articulated with correct grammar and spelling. Such responses do not state, “I completely agree.” The idea is that you pose additional questions and provide thoughtful feedback for your classmates. This means that the student clearly evaluates the author’s main arguments and conveys this in 100-200 words or less [instructor will monitor]. These responses are made early (by Thursday of each week) Moreover, evidence (i.e. quotes) are used from course readings for support. The student avoids long diatribes and sticks to course materials for support.
7-8 point range

Discussion leader(s) posts one of their own discussion questions that directly relate to the reading for the week by Monday, 11p.m. and periodically engages with classmates in discussions about their question.

Non-discussion leaders (respondents) respond to at least one of the questions posed by the discussion leaders and are somewhat engaged with the class about questions for the week. These responses have a few grammatical and spelling errors. Additionally, the student touches upon and understands the author’s arguments in the readings. The student attempts to articulate the main points of the author in 100 words or less, but the explanation is not clear enough. Rather, the student response does not simply state, “great work, I agree with your analysis.” The student submits later in the week – by Thursday/Friday and is not that active in discussions overall.

< 7 point range

Discussion leader(s) posts one of their own discussion questions that directly relate to the reading for the week by Monday, 11p.m. and does not engage with classmates in discussions about their question. The discussion leader does not have to respond or engage in the other questions for the week, but should oversee their own question and respond promptly in a professional manner.

Non discussion leaders (respondents) periodically respond to discussion questions. These responses are not clear and do not contain correct grammar. The student does not understand or comprehend the readings and the response is made around 10p.m. on Saturday, which does not provide enough time to discuss with classmates.

Grading

Assignments will carry the following point values:

**Discussion forums (60 points)**
Discussion leadership 20 x 1 = 20
Discussion participation 10 x 4 = 40

**Strategic process design project (240 points)**
Design brief draft 10
Design brief final 40
Current situation analysis draft 10
Current situation analysis final 40
Desired future state draft 10
Desired future state final 40
Plan of action draft 10
Plan of action final 40
Process design presentation 40
### Grading scale

<table>
<thead>
<tr>
<th>Grade</th>
<th>Points Range</th>
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<tbody>
<tr>
<td>A</td>
<td>279-300 points</td>
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<tr>
<td>A-</td>
<td>270-278 points</td>
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<tr>
<td>B+</td>
<td>261-269 points</td>
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<tr>
<td>B</td>
<td>249-260 points</td>
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<tr>
<td>B-</td>
<td>240-248 points</td>
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<tr>
<td>C+</td>
<td>231-239 points</td>
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<td>C</td>
<td>219-230 points</td>
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<tr>
<td>C-</td>
<td>210-218 points</td>
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<td>D+</td>
<td>201-209 points</td>
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<tr>
<td>D</td>
<td>189-200 points</td>
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<tr>
<td>D-</td>
<td>180-188 points</td>
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<td>F</td>
<td>Below 180 points</td>
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### Course schedule

This schedule may be modified as the semester progresses.

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<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Readings</th>
<th>Assignments</th>
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<tbody>
<tr>
<td><strong>STRATEGY</strong></td>
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<tr>
<td><strong>Week 1</strong></td>
<td><strong>Getting started</strong></td>
<td></td>
<td>• View video lecture</td>
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<tr>
<td>August 27-</td>
<td>• Getting to know each other</td>
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<td>• Review course syllabus</td>
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<tr>
<td>September 2</td>
<td>• Course content and expectations</td>
<td></td>
<td>• Decide on a public/nonprofit organization you want to work with</td>
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<td></td>
<td>• Getting to know Moodle</td>
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<td>• Schedule 1:1 conference</td>
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<td></td>
<td>• Sign up for discussion forum leaders</td>
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<td>• Introduce yourself to the class in the discussion forum by Wednesday at 11</td>
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<tr>
<td><strong>Week 2</strong></td>
<td><strong>The strategic plan is dead. Long live strategy.</strong></td>
<td></td>
<td>• View video lecture</td>
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<tr>
<td>September 3-9</td>
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<td></td>
<td>• Read The Strategic Plan is Dead. Long Live Strategy.</td>
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<td>• Read Rumelt Introduction: Overwhelming Obstacles</td>
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<td></td>
<td>• 1:1 CONFERENCE #1 (Zoom or phone)</td>
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<td><strong>Week 3</strong></td>
<td><strong>Good strategy bad strategy</strong></td>
<td></td>
<td>• View video lecture</td>
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<tr>
<td>September 10-16</td>
<td></td>
<td></td>
<td>• Read Rumelt introduction and chapters 1-3</td>
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<td></td>
<td></td>
<td></td>
<td>• DISCUSSION FORUM #1 (weeks 2-3 material)</td>
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</table>
| Week 4 | September 17-23 | The traditional strategic planning template | • View video lecture  
• Read Rumelt chapters 4-5 |
| Week 5 | September 24-30 | Introduction to adaptive strategy | • View video lecture  
• Read Friedman: *What the Hell Happened in 2007?*  
• Read Green: *Shifting from Strategic Planning to Strategic Agility*  
• DISCUSSION FORUM #2 (weeks 4-5 material)  
• ASSIGNMENT DUE 9/30 by 5 p.m.: Strategic plan design brief draft |
| Week 6 | October 1-7     | Thinking like a strategist | • View video lecture  
• Read Rumelt Chapters 16-18  
• ASSIGNMENT DUE 10/7 by 5 p.m.: Strategic plan design brief final |
| Week 7 | October 8-14    | Design thinking | • View video lecture  
• Read Liedtka and Ogilvie: Designing for Growth chapters 1-2  
• Read *An Introduction to Design Thinking Process Guide*  
• Optional read: Dam and Siang: *What is Design Thinking and Why Is It So Popular?*  
• Optional video: *Introduction to Design Thinking*  
• Schedule 1:1 conference  
• DISCUSSION FORUM #3 (weeks 6-7 material)  
• ASSIGNMENT DUE 10/14 by 5 p.m.: Current situation analysis draft |
| Week 8 | October 15-21   | Co-creation | • View video lecture  
• View video Read Prahalad and Ramaswamy: *The Co-Creation Connection*  
• 1:1 CONFERENCE #2  
• ASSIGNMENT DUE 10/21 by 5 p.m.: Current situation analysis final |
| Week 9 | October 22-28   | Facilitating creative processes | • View video lecture  
• Read Amiable: How to Kill Creativity  
• Read Lipmanowicz and McCandless: The Surprising Power of Liberating Structures chapter 2 Why Microstructures Matter  
• DISCUSSION FORUM #4 (weeks 8-9 material) |
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<th><strong>LEADERSHIP</strong></th>
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| **Week 10**  
October 29-  
November 4 | Leading change | • View video lecture  
• Read Collins: Good to Great article  
• ASSIGNMENT DUE 11/4 by 5 p.m.: Desired future state draft |
| **Week 11**  
November 5-11 | Good to great and the social sectors | • View video lecture  
• Read Collins: *Good to Great and the Social Sectors*  
• ASSIGNMENT DUE 11/18 by 5 p.m.: Desired future state final |
| **Week 12**  
November 12-18 | Organizational culture and structure as strategy | • View video lecture  
• Read Kotter: *Accelerate*  
• View Teams of Teams video  
• DISCUSSION FORUM #5 (weeks 10-12 material) |
| **Week 13**  
November 19-25  
Thanksgiving week | The greatest leader on Earth: a case study | • View video lecture  
• Read Verducci: *The Cubs Way* chapter 6: That’s Cub  
• ASSIGNMENT DUE 11/25 by 5 p.m.: Plan of action draft |
| **Week 14**  
November 25-  
December 2 | The real problem with execution | • View video lecture  
• Read McChesney, Covey and Huling: The Real Problem with Execution from *The 4 Disciplines of Execution*  
• ASSIGNMENT DUE 12/2 by 5 p.m.: Plan of action final |
| **Week 15**  
December 3-9 | Wrapping up | • View video lecture  
• Presentations (schedule to be determined) |
| **Week 16**  
December 10-14 | Finals week |  |

**Academic and class policies**

Please be familiar with the following University or class policies:

**Disability assistance:** The University of Montana does not discriminate against qualified students with disabilities. If a student would like to discuss the availability of accommodations, or any other matter relating to their disability, please contact Disability Services for Students. We will work with you to provide an appropriate modification.
Incompletes or withdrawals for the course: If for some reason the course is not working out for you please adhere to the University’s policies for the last day to drop a class.

Late assignments: Students are expected to submit all work by the date/time specified in the course calendar. Any exceptions to this must be approved by the instructor 72 hours before the date in question or be a clear emergency. Students must complete all assignments to receive a grade for the course.

University attendance policy: Students who are registered for a course but do not participate in the first two class forums/requirements may be required by the instructor to drop the course. This rule allows for early identification of class vacancies and to permit other students to add classes. Students must complete a drop form or drop the course in CyberBear to avoid receiving a failing grade. Students who know they will be absent, cannot participate or submit assignments should contact the instructor in advance.

Wikipedia: This online source is not reliable and should not be cited in any course assignment. The goal is to become accustomed to using scholarly sources for all work in any of your courses.

Academic Dishonesty (Plagiarism): Students must follow University academic policies. The University’s Graduate School Plagiarism Warning states:

Plagiarism is the appropriation or imitation of the language, ideas, and thoughts of another author and representing them as one's original work. It is a particularly intolerable offense in the academic community and is strictly forbidden. Students who plagiarize may fail the course and may be remanded to Academic Court for possible suspension or expulsion. Students must always be very careful to acknowledge any kind of borrowing that is included in their work. This means not only borrowed wording but also ideas. Acknowledgement of whatever is not one’s own original work is the proper and honest use of sources. Failure to acknowledge whatever is not one's own original work is plagiarism.

All work submitted must be your own; no duplicate work (work completed for another class) will be accepted. Acts of cheating or plagiarism will result in a grade of zero (0) for the assignment. Moreover, acts of plagiarism will also be reported to the Academic Court. To avoid acts of plagiarism, cite each reference or source you use and give proper credit for the ideas, opinions, and findings of others. When you are using the exact words of others, you must use quotation marks and include the page number where you found the quote in your citation.