

<b>PA 5251 Strategic Planning and Management, Fall Semester 2018</b>	
<b>Tuesdays</b> <b>6:00 – 8:45 P.M</b> <b>Humphrey Center 50B</b>	<b>Co-Instructor: John Bryson, Ph.D.</b> <b>Email: <a href="mailto:jmbryson@umn.edu">jmbryson@umn.edu</a></b> <b>Office: 612-625-5888</b> <b>Office Hours: Mondays 1:30 – 3:00 pm and by appointment</b> <b>Room: Humphrey Center 237</b> <b>Sign up: TO BE ADDED</b>
<b>3.0 Credits</b> <b>A-F Grading Scheme</b>	<b>Co-Instructor: Danbi Seo, ABD</b> <b>Email: <a href="mailto:danbiseo@umn.edu">danbiseo@umn.edu</a></b> <b>Office Hours: Wednesdays, 12:00 – 2:00 p.m., and by appointment</b> <b>Where: Humphrey Center 57</b> (The room needs a special access card. Please contact the instructor before visiting.) <b>Sign up <a href="#">here</a></b>

### Syllabus

This course examines the theory and practice of strategic planning and management for governments, public agencies, nonprofit organizations, collaborations, and to a lesser extent, communities.

The design of the course has been strongly influenced by experiential learning theory, including David’s Kolb’s (1983) *learning cycle*, James Zull’s (2002) views on improving the practice of teaching based on the biology of learning, and Michael Quinn Patton’s (2010) ideas on *developmental evaluation*.<sup>1</sup> Consequently, there will not be a great deal of formal lecturing in class, since much of what we have to say via lectures is available on vodcasts through the course Canvas site. We encourage you to watch these prior to the classes to which they apply. There will be some repetition of vodcast material in class, but typically not a lot.

The classes generally will be in two parts. The first part will utilize a discussion format focused on the topic and readings for the week. The second part will involve one or more of the following: an examination, discussion, and reflection on a specific case; instruction in a specific technique; or simulation exercises. Periodic individual, team, and class assessments will be utilized.

There one required text for the course, which may be purchased at the bookstore in Coffman Union. The book is:

John M. Bryson, *Strategic Planning for Public and Nonprofit Organizations, Fifth Edition* (San Francisco, CA: Jossey-Bass, 2018).

All royalties from book sales go to the Humphrey School’s student financial aid fund.

There are also a number of additional required readings. They (or links to them) will be found on the course website.

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<sup>1</sup> David Kolb (1983) *Experiential Learning*. Englewood Cliffs, NJ: Prentice-Hall; James Zull (2002) *The Art of Changing the Brain*, Sterling, VA: Stylus; and Michael Quinn Patton (2010) *Developmental Evaluation*, New York: Guilford Press.

## Course Objectives

The overall objective of the course is to **increase participants' abilities as individuals and in groups to think, act, and learn strategically**, where these latter terms are defined as follows (Bryson, 2010, p S264, note 1)<sup>2</sup>:

- **Strategic thinking** is thinking in context about how to pursue purposes or achieve goals. This also includes thinking about what the context is and how it might or should be changed; what the purposes are or should be; and what capabilities or competencies will or might be needed, and how they might be used, to achieve the purposes.
- **Strategic acting** is acting in context in light of future consequences to achieve purposes and/or to facilitate learning.
- **Strategic learning** is any change in a system (which could be an individual) that by adapting it better to its environment produces a more or less permanent change in its capacity to pursue its purposes.

More specifically, participants as individuals and in groups should be able to demonstrate in class and in individual and team assignments that they have met the following objectives (the broad categories for which come from Fink, 2003)<sup>3</sup>: Participants should have:

- **Gained essential knowledge, skills, and abilities**, including
  - Ability to compare and contrast rational, political, and deliberative decision making
  - Understanding selected approaches to strategic planning and management, the basic theories guiding them, and when each approach makes sense
  - Understanding of, and ability to, apply the Strategy Change Cycle, including:
    - the development of initial agreements
    - external and internal environmental analyses
    - strategic issue identification
    - strategy development
    - strategic plan review and adoption
    - visions of success
    - implementation
    - development of strategic management systems
  - Ability to:
    - use several different kinds of stakeholder analysis techniques
    - do analyses of strengths, weaknesses, opportunities, and challenges or threats (SWOC/T analysis)
    - make use of three kinds of mapping approaches: visual strategy mapping for individuals and groups, and purpose mapping
    - judge knowledge, policy, strategy, and political claims; sort out competing perspectives, and make plausible and persuasive strategy-related arguments
    - know how to create a useful business model canvas
    - make effective oral, written, and visual presentations
    - manage a complex student team project
    - engage with others in reflective dialogue, deliberation, and community building
- **Make use of applied knowledge and skills** built through:

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<sup>2</sup> John Bryson (2010) "The Future of Public and Nonprofit Strategic Planning in the United States," *Public Administration Review*, Supplement to Volume 70, pp. S255 – S267.

<sup>3</sup> Dee Fink (2003) *Creating Significant Learning Experiences*, San Francisco, CA: Jossey-Bass.

- In-class practice based on case studies, participants' experiences, and current significant policy or organizational challenges, and participants' hopes for the future
  - Individual case study analyses
  - Team projects
- ***Be able to integrated insights from several disciplines*** in order to develop, analyze, and implement strategies that appeal to diverse stakeholders and have the best chance for achieving beneficial outcomes.
- ***Be able to identify personal and social implications*** of course experiences through:
- Applying knowledge and skills to strategic planning-related challenges affecting themselves, their organizations, or their communities
  - Increasing personal understanding of how to lead and follow in ways that achieve public value and advance the common good
- ***Have deepened caring and commitment*** to improving groups, organizations, communities, and the broader societies in which we live through:
- Seeing oneself as a more efficacious change agent
  - Developing greater stores of hope and reasoned optimism
- ***Gained a foundation for continual learning*** about strategic thinking, acting, and learning through:
- Peer networking
  - Connection to a wealth of resources related to strategic thinking, acting, and learning for public and nonprofit organizations and communities
  - Development of habits of analysis, synthesis, and engagement that will increase capacity for change in the future

### **Individual and Team Responsibilities**

Students will have individual and team responsibilities. The responsibilities are as follows:

1. **Individual: Attend and participate in class – 10% of grade.**
2. **Individual: Do short assignments related to weekly course readings – 10% of grade.**
  - a. Read the required materials for each week
  - b. Be a full participant in the five Dialogue and Discussion Forums:
    - i. During Weeks 5, 6, 7, 10 and 11 we will have Dialogue and Deliberation Forums.
    - ii. Each class member will be assigned to one of several forum groups the second week of class. Each group will have four or five members.
    - iii. **For four of the five weeks, each class member will be required to prepare a one-page response to questions concerning one reading per week. (Note that the readings are different from – and not to be confused with – the cases that will be analyzed in class.)** Responses are to be no longer than one page and are to be posted to the relevant forum on the Canvas site no later than 5:00 pm the Sunday *prior to* the Tuesday when readings will be discussed in class.
    - iv. **Each forum member is also expected to read all of the posts to the Forum prior to the Tuesday when readings will be discussed in class.**
2. **Individual: Serve as a facilitator for one Dialogue and Deliberation Forum – 5% of grade.**
  - a. **Each week each forum will have a different Forum Facilitator. The facilitation role will rotate, so that each forum member gets a chance to be the facilitator.** The facilitator will work with the

other forum members to make sure each reading will have some respondents. This means that the reading assignments should probably be made no later than the week prior to when the readings will be discussed in class.

- b. **The forum facilitator will summarize, compare, and contrast the individual responses to the week's readings – and also offer some questions to prompt discussion – in no more than three pages. The forum facilitator's two- to three-pager should be posted relevant forum's spot on course website by 4:30 pm the Tuesday during which the readings will be discussed.**
  - c. The facilitator will then help the forum engage with the readings via dialogue and deliberation.
3. **Individual: Do four short case-related assignments. Respond briefly to a series of questions on each of four (of five) cases prior to the class in which the case is discussed – 10% of grade.**
  4. **Individual: Do longer assignment related to one case. Prepare one short five-page (5 pp.) case analysis on the fifth case – 20% of grade.**
  5. **Individual: Make contributions to course resources**, e.g., interesting websites, useful podcasts or YouTube videos, case examples, suggestions to advance the work of other teams, etc. **Quality of contributions can make a difference on the margin to your course grade.**
  6. **Individual: Assess how well your team is functioning. Fill out two team assessment questionnaires, one at the midway point in the semester and one at the end.** Required, but there will be no effect on your grade unless they are not filled out.
  7. **Team: (a) Prepare a 20-page paper (not counting references or supporting material); or (b) alternatively, a web-based instructional module on a topic related to strategic planning – 30% of grade.**
  8. **Team: Make a 15-20 minute presentation to the class based on the team paper or web-based instructional module – 15% of grade**

Incompletes will be given only in *exceptional* circumstances. All instances of scholastic dishonesty will be dealt with strictly by the book. All papers will be run through Turnitin.com as a check on plagiarism.

**Individual and team responsibilities may be summarized as follows:**

<b>Individual</b>	<b>Team</b>	<b>Grading</b>
Attend and participate in class		10% of grade
On four separate weeks (out of a total of five) designated for dialogue and deliberation forums, prepare a one-page response to questions on required readings. Post on Canvas by Sunday at 5 pm prior to the class in which the readings will be discussed		10% of grade (2.5% for each of four responses)
Serve as dialogue and deliberation forum facilitator for one week out of the five scheduled for this activity. In two to three (2–3) pages, summarize, compare, and contrast forum members’ one-page responses, include a set of discussion questions, and post on Canvas prior to class.		5% of grade
Respond briefly to a series of questions on each of four cases prior to the class in which the case is discussed.		10% of grade (2.5% for each of the five responses)
Prepare a five-page (5 pp.) case analysis (not counting attachments on the fifth of the five cases. Turn in prior to the class in which it is discussed.		20% of grade.
Offer contributions of course resources, e.g., interesting websites, useful podcasts or YouTube videos, case examples, suggestions to advance the work of other teams, etc.		The quality of contributions can make a difference on the margin to your course grade.
Fill out two team assessment questionnaires, one at the mid-point of the course and one at the end of the course		These assessments are meant to help me understand how well the team is functioning. They will not be graded <i>per se</i> , but failure to fill out the assessments can negatively affect your grade.
	Prepare a 20-page paper (not counting references or supporting material); or alternatively, a web-based instructional module on a topic related to strategic planning –	30% of grade.
	Make a 15-20 minute presentation to the class based on the team paper or web-based instructional module to be followed by a 10 minute class discussion	15% of grade
		<b>100%</b>

## Team Projects

Teams are typically a very important part of strategic planning efforts. Teams in this course should approach their work strategically and reflect on the connections of their work to strategic planning and management more generally.

Teams can choose to pursue two different kinds of projects:

1. The first is to **prepare a 20-page paper** (not counting references or supporting material) Possible topics include one of the following:
  - a. A review of review of the literature and practice (including examples and guidelines for use) regarding the applicability of one or more of the following (or some other) **electronic technologies and their connections (or not) to strategic planning**:
    - strategy mapping softwares
    - project management softwares
    - crowdsourcing
    - social media
    - geographic information systems
    - computer-assisted decision theatres
    - electronic 3-D visualization technologies
    - another technology; or
  - b. A critical literature review of an important **strategic planning topic**, such as:
    - Business models
    - Visual techniques for developing vision, mission, or strategy
    - Persuasion, dialogue, and deliberation
    - A set of citizen engagement techniques with examples from practice
    - Particular strategic planning approaches
    - Effective policy making boards
    - Re-engineering
    - A topic jointly negotiated with the instructor; or,
  - c. A **teaching case** involving suitable for use in the course, along with a supplemental teaching note; or
  - d. A **critique of an actual use of strategic planning**.
  - e. **Development of a performance measurement approach and supporting argumentation for a real organization**; or
2. The second option for teams is to **develop a web-based instructional module** on a particular “micro-process” related to strategic planning and management, such as:
  - a. public value process mapping
  - b. value propositions
  - c. particular stakeholder analysis techniques, e.g., stakeholder support versus opposition
  - d. power mapping
  - e. portfolio analyses
  - f. competitive analysis
  - g. initial agreements
  - h. issue-precedence diagrams
  - i. one-on-ones
  - j. or some other relevant topic.

Technical support is available.

Good examples of instructional videos on micro-processes include:

- SWOT Analyses: <https://www.hubertproject.org/hubert-material/438/>
- Leading with Theories of Change: <https://www.hubertproject.org/hubert-material/426/>
- Purpose mapping: <https://hubertproject.org/hubert-material/445/>
- Facilitation: <https://www.youtube.com/watch?v=UDLGjKBHSXg>
- Policy field analysis: [https://www.youtube.com/watch?v=2YTxm\\_ZkHu0](https://www.youtube.com/watch?v=2YTxm_ZkHu0)

Teams are encouraged to make use of Basecamp (or some other project management tool, such as Trello or Google Drive). Basecamp is a project management software that allows teams to collaborate and execute their project. Basecamp and Trello allow teams to set milestones, make to-do lists and track every aspect of their project throughout the semester. In addition to managing milestones and to-do lists, Basecamp allows teams to share files and offers a messaging system. Any time a teammate leaves an update or uploads a file to Basecamp, you will receive an e-mail in your U of MN e-mail account.

### **Due Dates Tied to Team Projects**

Teams will be formed by **Tuesday, September 18, 2018**.

Each team should post to the course Canvas site the proposed topic for their paper by **Tuesday, October 2, 2018**. Teams should also post to the course website by that date the set of norms the team agrees to use to govern its behavior, along with the rest of the details of their initial agreement.

Each team should post to the course Canvas site: (1) a detailed outline and set of references for their paper or project, and (2) a copy of its final revised initial agreement by **Tuesday, October 23, 2018**.

Each team should meet with the instructor for an hour at a mutually convenient place and time **between Monday, October 29, and Tuesday, October 13** to discuss progress on their paper or project. **At least one day prior to the meeting team members should individually fill out and post a questionnaire focused on how well the team is functioning.**

Each team should post a rough draft of their paper to the course Moodle site by **Tuesday, November 20, 2018**. Comments on the paper or project will be returned to the team within 10 days.

The team papers are due on the course Moodle site (unless other arrangements have been made with the instructor) by 5:00 p.m. by **Friday, December 14, 2018**.

### **Course Website Canvas**

Some or all of our class readings, resources and assignments are available on the course Canvas site. Find the site at [canvas.umn.edu](https://canvas.umn.edu), or go to “Key Links” on [MyU.umn.edu](https://myu.umn.edu) and scroll down to Canvas. For help with Canvas, go to <https://z.umn.edu/CanvasHelpandSetup> or click the “Canvas Help” link on our course Canvas site.

### **Set Your Canvas Notification Preferences**

This course depends upon your ability to receive communications from your instructor and/or about the class. It's important that you set up your Canvas “notification preferences” to choose how and when you'd like to receive

messages via text, email, or both. Find easy-to-follow instructions at “How do I set my Canvas notification preferences as a student?": <https://community.canvaslms.com/docs/DOC-10624-4212710344>.

We **strongly recommend** that you opt to receive notification of Announcements, Conversation Messages, and Added to Conversation so that you don't risk missing important class communication. For assistance, please contact [help@umn.edu](mailto:help@umn.edu) or your instructor.

### **Access to readings and materials after semester**

Student may lose access to Canvas sites and course reserves at the end of the semester. If you'd like to download class material (depending on copyright) or your own work for personal use, please do so during the semester.

### **University and School policies**

For links to University of Minnesota and Humphrey School policies, please click the “U of M Policies” link on our course Canvas site, or see <https://z.umn.edu/PolicyStatements>. There you will find the policies governing:

- Student conduct
- Use of Personal Electronic Devices in the Classroom
- Scholastic Dishonesty
- Makeup Work for Legitimate Absences
- Appropriate Student Use of Class Notes and Course Materials
- Grading and Transcripts
- Sexual Harassment
- Equity, Diversity, Equal Opportunity, and Affirmative Action
- Disability Accommodations
- Mental Health and Stress Management
- Academic Freedom and Responsibility

### **Name and Pronoun Usage\***

Class rosters are provided to the instructors with the student's legal name, unless a preferred' name has been entered into a student's OneStop account. Visit this link for more information:

[https://onestop.umn.edu/howto/set\\_name.html](https://onestop.umn.edu/howto/set_name.html).

Note: it usually takes 24 hours for your information to change. Also, 'preferred' name will show up on class rosters but not on class waitlists.

We will honor your request at any point to address you by your correct name, gender pronoun, or in any other manner you would like to be referred to. If you like, we will also instruct class members to do the same. Please advise us of how you would like to be referred to in class.

*\*taken from LGBTQIA Identities and Communities Certificate Workshop materials*

### Detailed Overview of Class Sessions

<b>DATE</b>	<b>September 4 Week 1</b>	<b>September 11 Week 2</b>	<b>September 18 Week 3</b>	<b>September 25 Week 4 –</b>	<b>October 2 Week 5 – <b>Forum</b></b>
<b>TOPIC</b>	Introduction	Strategic Planning in Practice	Purposes, Goals, Problems and Solutions, and Issues and Answers	Politics, Deliberation, and Initial Agreements	Mission and Mandates
<b>FOCUS</b>	Course overview  Introduction to strategic thinking, acting, and learning	A quick run-through of strategic planning applied to a real situation	Understanding ends and means and their inter-relationships	Getting started on strategic planning and creating a “plan to plan”  Team assignments	Attention to “musts” and “wants”  Figuring out purposes
<b>LECTURE VODCAST SITE</b>	<a href="http://hubert.hhh.u mn.edu/sp/SP2.m p4">http://hubert.hhh.u mn.edu/sp/SP2.m p4</a>			<a href="http://hubert.hhh.u mn.edu/sp/SP3.m p4">http://hubert.hhh.u mn.edu/sp/SP3.m p4</a>	<a href="http://hubert.hhh.u mn.edu/sp/SP4.m p4">http://hubert.hhh.u mn.edu/sp/SP4.m p4</a>
<b>GUEST</b>					
<b>READINGS</b>	Bryson (2018), Chs. 1 & 2  Yang (2016)  Seligman and Tierney (2017) <a href="https://www.nytimes.com/2017/05/19/opinion/sunday/why-the-future-is-always-on-your-mind.html?mcubz=1&amp;r=0">https://www.nytimes.com/2017/05/19/opinion/sunday/why-the-future-is-always-on-your-mind.html?mcubz=1&amp;r=0</a>	Fernandez and Rainey (2006)  Romme (2003)  Facilitation: <a href="https://www.youtube.com/watch?v=UDLGjKBHSXg">https://www.youtube.com/watch?v=UDLGjKBHSXg</a>	Bryson, Ackermann and Eden (2014), Part 1  Lindblom (1959)  Nabatchi (2018)  Poister, Edwards, Pasha, and Edwards (2013)	Bryson (2018), Ch. 3 and Resource A  Simons and Jones (2011)	Bryson (2018), Ch. 4 and Resource A  Dutton and Dukerich (1991)  Goodsell (2011)  RSA Animate website <a href="http://www.youtube.com/watch?v=u6XAPnuFjJc">http://www.youtube.com/watch?v=u6XAPnuFjJc</a>
<b>TOOLS</b>	Conceptual skill in how to think strategically about strategic planning and management	Flipcharts, snow cards, dots, and marking pens  Basis stakeholder analysis technique	Cognitive mapping	Power vs. interest grid  Stakeholder influence diagrams  Stakeholder support vs. opposition grids	Purpose mapping technique  <a href="https://www.hubertproject.org/hubert-material/445/">https://www.hubertproject.org/hubert-material/445/</a>
<b>CASE ANALYSIS</b>	Organizing America: A Plan for the Obama Campaign  Alexander the Great’s defeat of Darius III at the Battle of Gaugamela	Pennsylvania Department of Transportation		Casa Latina (A)	The Politics of Establishing an Urban Growth Area in St. Claire County
<b>ASSIGNMENT DUE OR HANDED OUT</b>	Personal Information and Interests Form	Lessons from Experience with Teams; bring to class next week	Team assignments made		Proposed topics for team papers due, along with team’s “initial” initial agreement

<b>DATE</b>	<b>October 9 Week 6 – Forum</b>	<b>October 16 Week 7– Forum</b>	<b>October 23 Week 8 –</b>	<b>October 30 Week 9</b>	<b>November 6 Week 10 – Forum</b>
<b>TOPIC</b>	External and Internal Environmental Assessments	Visioning	Strategic Issues	Visual Strategy Mapping	Distinctive Competencies and Business Models
<b>FOCUS</b>	Clarifying and synthesizing what is going on outside and inside the organization	Visioning and its relationship to practical politics	Identifying the fundamental challenges and/or policy choices facing the organization	Developing visual strategy maps	Making use of competencies and assets to join capabilities with aspirations
<b>LECTURE VODCAST SITE</b>	<a href="http://hubert.hhh.u mn.edu/sp/SP5.m p4">http://hubert.hhh.u mn.edu/sp/SP5.m p4</a>	<a href="http://hubert.hhh.u mn.edu/sp/SP6.m p4">http://hubert.hhh.u mn.edu/sp/SP6.m p4</a>	<a href="http://hubert.hhh.u mn.edu/sp/SP7.m p4">http://hubert.hhh.u mn.edu/sp/SP7.m p4</a>		
<b>GUEST</b>		Laurie Ohmann, CC Twin Cities			
<b>READINGS</b>	Bryson (2018), Ch. 5 and Resource B  Kroll and Moynihan (2015)  Patton (2010), Ch. 7  Vining (2011)  <a href="https://www.hubertproject.org/hubert-material/438/">https://www.hubertproject.org/hubert-material/438/</a>	Alford and Yates (2014)  Kornberger and Clegg (2011)  Molina Costa (2014)  Schwarz (1991), Appendix  A Periodic Table of Visualization Methods (skim)	Bryson (2018), Ch. 6  Light (2016)  Nabatchi (2018)  Weick, Sutcliffe, and Obstfeld (2005)	Bryson, Ackermann and Eden (2014), Part 1  Jung (2014)  Rainey and Steinbacher (1999)	Bryson, Ackermann and Eden (2007)  Donahue and Tuohy (2006)  Nabatchi, Sancino and Sicilia (2017)  Nonprofit business model canvas: <a href="https://www.youtube.com/watch?v=4pcnRIPJv8">https://www.youtube.com/watch?v=4pcnRIPJv8</a>
<b>TOOLS</b>	SWOC/T analyses  The adaptive cycle	Scenarios  Journalist’s technique  Value chains	Strategic issue descriptions  Issue-precedence diagrams	Visual strategy mapping  <a href="https://civios.umn.edu/case_study/visual-strategy-mapping-groups/">https://civios.umn.edu/case_study/visual-strategy-mapping-groups/</a>	Livelihood Schemes  Business model canvases
<b>CASE ANALYSIS</b>	Innovating in the Public Sector: Republica	The Seattle Art Museum and Low-Income Housing	Casa Latina (A) – Same case as Week 4	Casa Latina (A)	Casa Latina (A)
<b>ASSIGNMENT DUE OR HANDED OUT</b>			Detailed outline and references for team papers plus final initial agreement due	Teams meet with Bryson and Seo between October 29 and November 13	Teams meet with Bryson and Seo between October 29 and November 13

<b>DATE</b>	<b>November 13 Week 11– Forum</b>	<b>November 20 Week 12</b>	<b>November 27 Week 13</b>	<b>December 4 Week 14</b>	<b>December 11 Week 15</b>
<b>TOPIC -</b>	Strategies and Strategic Plans	Implementation	Strategic Leadership	Team Presentations	Team Presentations and Course Wrap
<b>FOCUS</b>	Developing effective responses to the issues; building effective bridges linking internal and external environments	Strategies and plans are not enough -- making a real difference is where the rubber meets the road	“Inspiring and mobilizing others to undertake collective action in pursuit of the common good”	Teams educate the class about what they have learned in this class session and the next	Course Wrap-Up, Concluding Remarks, and Evaluation  What have you learned?  What more would you like to learn?
<b>LECTURE VODCAST SITE</b>	<a href="http://hubert.hhh.u mn.edu/sp/SP8.mp 4">http://hubert.hhh.u mn.edu/sp/SP8.mp 4</a>				
<b>GUEST</b>	Andrea Larson & Anna Koelsch, City of Mpls.		Gary Cunningham, MEDA (invited)		
<b>READINGS</b>	Bryson (2018), Chs. 7 and 8  Bryson, et al. (2009)  Senge (2006), Ch. 14  Elbanna, et al (2016)	Bryson (2011), Chs. 9 and 10  Alvesson and Spicer (2012)  Behn (2008)  Niven (2008)	Bryson (2018), Chs. 10 and 11  Senge (2006), Ch. 15  Magee and Friesen (2014)  O’Leary, et al. (2012) Skim MEDA’s website ( <a href="http://meda.net/">http://meda.net/</a> )		Bryson (2018), Ch. 12
<b>TOOLS</b>	<ul style="list-style-type: none"> <li>• Strategy categories</li> <li>• Persuasive stories</li> <li>• Strategic learning</li> </ul>	Performance-Stat systems  Balanced Scorecards	Strategic leadership skills  Conceptual skills in process design and how to think about the toolkit		Strategic learning
<b>CASE ANALYSIS</b>		Implementing a High Risk Program	Metropolitan Economic Development Association		
<b>ASSIGNMENTS DUE</b>	Teams will have met with Bryson and Seo by November 13	Rough draft of team papers or products due Friday, November 20 by 5:00 pm			Team papers due Friday, December 14, by 5:00 pm.

## PA 5251 STRATEGIC PLANNING AND MANAGEMENT

### Reading Citations and Cases

#### WEEK 1 COURSE INTRODUCTION

##### 4 September

Bryson (2011), Chs. 1 and 2

Kaifeng Yang (2016), "Creating Public Value and Institutional Innovation across Boundaries: An Integrative Process of Participation, Legitimation, and Implementation," *Public Administration Review*, Early view at: DOI: 10.1111/puar.12561

Martin Seligman and John Tierney (May 19, 2017) We Aren't Built to Live in the Moment. *New York Times Sunday Review*. <https://www.nytimes.com/2017/05/19/opinion/sunday/why-the-future-is-always-on-your-mind.html?mcubz=1&r=0>

##### CASES:

"Organizing America: A Plan for the Obama Campaign"

Robert Pederson (1998) *A Study of Combined Arms Warfare by Alexander the Great*. Ft. Leavenworth, KS: U. S. Army Command and General Staff College, Ch. 4, "The Campaign in Eastern Persia," pp. 46 – 59.

Walk-through other examples in class.

#### WEEK 2 APPLYING STRATEGIC PLANNING IN PRACTICE

##### 11 September

Sergio Fernandez and Hal G. Rainey (2006) "Managing Successful Organizational Change in the Public Sector: An Agenda for Research and Practice," *Public Administration Review*, 66(2), pp. 1 – 25.

Georges Romme (2003) "Making a Difference: Organization as Design," *Organization Science*, 14(5), pp. 558 – 573.

Facilitation: <https://www.youtube.com/watch?v=UDLGjKBHSXg>

CASE: The Pennsylvania Department of Transportation

#### WEEK 3 PURPOSES, GOALS, PROBLEMS AND SOLUTIONS, AND ISSUES AND ANSWERS

##### 18 September

John Bryson, Fran Ackermann, and Colin Eden (2014) *Visual Strategy*. Hoboken, NJ: John Wiley, Part 1, pp. 1 - 25.

Charles Lindblom (1959) The science of "Muddling Through." *Public Administration Review* 19(2): 79-88.

Tina Nabatchi (2018) Public Values Frame in Administration and Governance. *Perspectives on Public Management and Governance*, pp. 59 - 72.

Theodore Poister, Lauren Edwards Hamilton, Obed Pasha, and Jason Edwards (2013) "Strategy Formulation and Performance: Evidence from Local Public Transit Agencies," *Public Performance and Management Review*, 36(4), pp. 585 – 615.

## **WEEK 4 POLITICS, DELIBERATION, AND INITIAL AGREEMENTS**

### **25 September**

Bryson (2018), Chapter 3 and Resource A.

Herbert Simons and Jean Jones (2011) *Persuasion in Society*, 2<sup>nd</sup> Edition. Thousand Oaks, CA: SAGE, Ch. 8, “Reasoning and Evidence,” pp. 155 – 178.

**CASE:** Casa Latina (A)

## **WEEK 5 MISSION AND MANDATES – FORUM**

### **2 October**

Bryson (2011), Ch. 4 and Resource A.

Jane E. Dutton and Janet M. Dukerich (1991) “Keeping An Eye on the Mirror: The Role of Image and Identity in Organizational Adaptation,” *Academy of Management Journal* 34(3), pp. 517-54.

Charles Goodsell (2011) *Mission Mistique*. Washington, DC: CQ Press, Chapter 1, “Mission Mystique and a Belief System Template,” pp. 1 – 25.

SKIM: RSA Animate website, an 8 minute video featuring Daniel Pink on autonomy, mastery, and purpose; found at: <http://www.youtube.com/watch?v=u6XAPnuFjJc> NOTE: Forums should not assign the video to one of their members.

VIEW: Purpose mapping: <https://hubert.hhh.umn.edu/SPStudyFa16/PurposeMapFINAL/index.html>

**CASE:** The Politics of Establishing an Urban Growth Area in St. Claire County

## **WEEK 6 EXTERNAL AND INTERNAL ENVIRONMENTAL ASSESSMENTS – FORUM**

### **9 October**

Bryson (2018), Ch. 5 and Resource B.

Alexander Kroll and Donald Moynihan (2015) “Creating Public Value Using Performance Information,” in John Bryson, Barbara Crosby and Laura Bloomberg, eds., *Valuing Public Value*, Washington, DC: Georgetown University Press, pp. 189 – 203.

Michael Quinn Patton (2010), *Developmental Evaluation*. New York: Guilford Press, Ch. 7, “The Adaptive Cycle and Developmental Evaluation,” pp. 189 – 226.

Aiden Vining (2011) “Public Agency External Analysis Using the ‘Five Forces’ Framework,” *International Public Management Journal*, 14(1), pp. 63 – 105.

**CASE:** Innovating in the Public Sector: Republica

## **WEEK 7 VISIONING – FORUM**

### **16 October**

John Alford and Sophie Yates (2014) “Mapping Public Value Processes,” *International Journal of Public Sector Management*, 27(4), pp. 334 – 352.

Martin Kornberger and Stewart Clegg (2011) Strategy as Performative Practice: The Case of Sydney 2030. *Strategic Organization*, 9(2) 136–162.

Patricia Molina Costa (2014) From Plan to Reality: Implementing a Community Vision in Jackson Square, Boston, *Planning Theory and Practice*, 15(3), pp. 293 – 310.

Peter Schwartz (1991) *The Art of the Long View*, New York: Doubleday, Appendix, pp. 226-234.

A Periodic Table of Visualization Methods: [http://www.visual-literacy.org/periodic\\_table/periodic\\_table.html](http://www.visual-literacy.org/periodic_table/periodic_table.html)

**CASE:** The Seattle Art Museum and Low-Income Housing

## **WEEK 8 STRATEGIC ISSUES**

### **25 October**

Bryson (2018), Ch. 6.

Paul Light (2016) “Vision + Action = Faithful Execution: Why Government Daydreams and How to Stop the Cascade of Breakdowns That Now Haunts it,” *PS: Political Science and Politics*, 49(1), pp. 5-20

Karl Weick, Kathleen Sutcliffe, and David Obstfeld (2005) “Organizing and the Process of Sensemaking,” *Organization Science*, 16(4), pp. 409 – 421.

**CASE:** Casa Latina (A) – Same as Week 4

## **WEEK 9 VISUAL STRATEGY MAPPING**

### **30 October**

John Bryson, Fran Ackermann, and Colin Eden (2014) *Visual Strategy*. Hoboken, NJ: John Wiley, Part 1, pp. 1 - 25.

Chun Su Jung (2014) “Extending the Theory of Goal Ambiguity to Programs: Examining the Relationship Between Goal Ambiguity and Performance,” *Public Administration Review*, 74(2), pp. 205 – 219.

Hal Rainey and Patricia Steinbacher (1999) “Galloping Elephants: Developing Elements of a Theory of Effective Government Organizations,” *Journal of Public Administration Research and Theory*, 9(1), pp. 1-32.

**CASE:** Casa Latina (A)

## **WEEK 10 DISTINCTIVE COMPETENCIES AND BUSINESS MODELS – FORUM**

### **6 November**

John M. Bryson, Fran Ackermann, and Colin Eden, Putting the Resource-Based View of Strategy and Distinctive Competencies to Work in Public Organizations, *Public Administration Review*, 67(4), 2007, pp. 702 – 717.

Amy Donahue and Robert Tuohy (2006) Lessons We Don’t Learn: A Study of the Lessons of Disasters, Why We Repeat Them, and How We Can Learn Them, *Homeland Security Affairs*, 2(2), pp. 1 – 28.

Tina Nabatachi, Alessandro Sancino, and Mariafrancesca Scilia (2017) Varieties of Participation in Public Services: The Who, When, and What of Coproduction. *Public Administration Review*, 77(5), pp. 766 - 776.

Nonprofit business model canvas: <https://www.youtube.com/watch?v=4pcnRlPJv8>

**CASE:** Casa Latina (A)

## **WEEK 11 STRATEGIES AND STRATEGIC PLANS – FORUM**

### **13 November**

Bryson (2018), Chs. 7 and 8

John M. Bryson, Barbara C. Crosby, and John K. Bryson (2009), “Understanding Strategic Planning and the Formulation and Implementation of Strategic Plans as a Way of Knowing,” *International Public Management Journal*, 12(2), pp.172 - 207.

Said Elbanna, Rhys Andrews and Raili Pollanen (2016) “Strategic Planning and Implementation Success in Public Service Organizations,” *Public Management Review*, 18(7-8), pp. 1017 – 1042.

Peter Senge (2006) *The Fifth Discipline: The Art and Practice of the Learning Organization*, Chapter 14, Strategies, New York: Doubleday, pp. 283 – 316.

## **WEEK 12 IMPLEMENTATION**

### **20 November**

Bryson (2018), Chs. 9 and 10

Mats Alvesson and Andre Spicer (2012) A Stupidity-Based Theory of Organizations. *Journal of Management Studies*, 49(7), pp. 1094-1220.

Robert Behn (2008) Designing PerformanceStat, *Public Performance and Management Review*, 32(2), pp. 206 – 235.

Paul Niven (2008) *Balanced Scorecard Step-by-Step for Government and Nonprofit Agencies*. New York: John Wiley, Chapter 1, Introduction to the Balanced Scorecard, pp. 1 – 26.

**CASE:** Implementing a High-Risk, High Priority, and High Visibility Program in a Decentralized Organization: A Case Study of the U.S. Fish and Wildlife Service

## **WEEK 13 STRATEGIC LEADERSHIP**

### **27 November**

Bryson (2018), Ch. 10 and 11.

Joe S. Magee and Clifford W. Frasier (2014). Status and Power: The Principle Inputs to Influence for Public Managers. *Public Management Review*, 74(3), pp. 307-317.

Rosemary O’Leary, Yujin Choi, and Catherine Gerard (2012). The Skill Set of the Successful Collaborator. *Public Administration Review*, 72 (S1), pp. 70-83.

Peter Senge (2006), *The Fifth Discipline*. New York: Doubleday, Chapter 15, The Leader’s New Work, pp. 317 – 340.

**CASE:** Metropolitan Economic Development Association

## **WEEK 14 TEAM PRESENTATIONS**

### **4 December**

**WEEK 15 TEAM PRESENTATIONS, COURSE WRAP-UP, CONCLUDING REMARKS, AND  
EVALUATION**

**11 December**