

**SOL PRICE SCHOOL OF PUBLIC POLICY  
UNIVERSITY OF SOUTHERN CALIFORNIA  
PPD 673 - COMPREHENSIVE STRATEGIC PLANNING**

**SYLLABUS**

**Instructor:** Rick Culley, Ph.D.

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**Consultations:** By appointment

**FORMAT**

This course is scheduled in an Intensive Semester Format with weekly online Canvas discussions. Advance reading and preparation is required before, between and after the three in-class sessions.

Please make sure you have read the course material so you are well prepared for the Online and Class discussions. The Reflection Papers should be prepared in Word format, Times New Roman 12 font (**no PDFs please**).

**ONLINE ASSIGNMENTS**

Your online assignments and discussion questions begin the first week of school starting the week of **January 7, 2019**, and you are required to post twice per week.

**IN CLASS DATES & TIMES**

**Session I:**

Friday	February 1, 2019	9am – 5pm
Saturday	February 2, 2019	9am – 5pm
Sunday	February 3, 2019	8:30am – 12pm

**Session II:**

Friday	March 8, 2019	9am – 5pm
Saturday	March 9, 2019	8:30 am – 12 pm

**Session III:**

Friday	April 12, 2019	8:30 am – 5pm
Saturday	April 13, 2019	8:30 am – 12pm

**ROOM LOCATION****SESSION I**

TBD

**SESSION II**

TBD

**SESSION III**

TBD

**COURSE DESCRIPTION**

This course focuses on the major areas of strategic planning; formulation, implementation and evaluation. It provides an in depth understanding of the subject in terms of both scholarly readings and professional application. Participants will learn that when it comes to Strategy Planning, regardless of the sector (public, private, non-profit), there's more similarities than differences.

There will be more focus on thinking strategically and formulating a strategic plan than on implementation and evaluation. This is because you have to know how to develop a strategic plan before you can implement or evaluate it. However, we will cover implementation and evaluation quite sufficiently.

**LEARNING OBJECTIVES**

- Develop a clear understanding of the three phases of the Strategic Planning Process.
- Identify and discuss the significance of the distinct components of a strategic plan.
- Present and review the processes involved in developing, implementing and monitoring a strategic plan.
- Learn how to prepare a strategic plan; developing the knowledge, skills, understanding to do it successfully.
- Explore factors that support and block developing and implementing a strategic plan.
- Analyze and evaluate strategic plans; their strengths and weaknesses, what works, what doesn't and why.
- Gain understanding of the differences among strategic plans in the private, public and nonprofit organizations.

**METHOD/APPROACH:**

- Highly participative.
- Case studies and analysis.
- Individual and group assignments.
- Interactive, informative lectures and presentations.
- Weekly online discussions to enhance your knowledge and understanding of key topics.
- A Strategic Planning project that's a challenging, engaging, relevant and enjoyable learning experience.

**ONLINE DISCUSSION FORMAT****INSTRUCTOR'S POST**

Dr. Culley will post questions to Blackboard by noon, Sunday. Week one's post will be available on Blackboard by noon on Sunday, **January 6, 2019**.

**STUDENT’S POSTS – TWO PER WEEK**

Students must answer the Professor’s weekly question by midnight Wednesday.

In addition, students must comment on at least two responses of classmates by midnight Saturday.

As a result, each student will provide at least three responses per week.

Discussion posts should adhere to a guideline of no less than 50 words but no more than 200 words.

**CLASS ATTENDANCE, ONLINE PARTICIPATION, PREPARATION**

Attendance at all seven full day sessions is required. You are expected to be well prepared and engage in discussion during class.

Students are expected to participate in all 11 weekly online discussions by addressing the questions posted and providing a response or observation every week. At least two posts per week.

Missing a full day of class or an online discussion will adversely impact your grade unless it is a personal or medical emergency.

You must complete all preparation for your class work, online assignments, analytical papers and the group project.

**PERFORMANCE STANDARDS / GUIDELINES / EXPECTATIONS**

Students are expected to do quality work and perform at a level consistent with a graduate student in the Sol Price School of Public Policy at the University of Southern California.

Particular focus will be on:

- Thorough, quality research and analysis.
- Creative and insightful observations / comments.
- Clarity of thinking and writing.

**CRITERIA FOR GRADES**

- Research/Preparation Paper / First Assignment..... **20%**
- Analytical Paper (1) / Second Assignment..... **10%**
- Team Project..... **30%**
- Online Discussion..... **15%**
- Reflection Paper / Third Assignment ..... **15%**
- Class Participation..... **10%**
  - Engaging in discussions
  - Speaking up / raising questions
  - Active involvement in team / group activities

**REQUIREMENTS FOR ONLINE PARTICIPATION AND GRADE**

Your online grade is worth 15% of your grade. You will be graded on your contributions for the weeks that discussions are required.

Your evaluation will take into account your level of engagement with other students’ posts as well as with the Professor’s initial question.

**CRITERIA FOR ONLINE EVALUATION**

- Online postings/discussions must be based on your assessment, analysis, logic or evaluation of the assignment; readings from assigned books, articles and for the topic under discussion.
- You are eligible for up to 10 total points each week based on the following:
  - On time response to the Professor’s initial post.
  - Two additional responses to classmates’ posts and submitted on time.
  - Clearly written analysis, insight and observations.

**INCOMPLETE**

Incomplete is assigned when work is not completed because of documented illness or other “emergencies”\* occurring after the twelfth week of the semester (or the 12<sup>th</sup> week equivalent for any course that is scheduled for less than 15 weeks).

\*Emergency- a situation / event which could not be foreseen/is beyond the student’s control / prevents the student from taking the final examination or completing other work due during the final exam period.

*See pages 9 & 10 of the “Grading and Corrections of Grades Handbook” prepared by The Office of Academic Records and Registrar / revised June, 2011*

**STATEMENT OF ACADEMIC INTEGRITY**

The University Student Conduct Code establishes the expectations that individual work will be submitted, unless otherwise allowed by the instructor, and that general principles of academic honesty, including the respect for the intellectual property rights of others will be followed. This means that the ideas and wordings of another writer must be acknowledged and appropriately used.

**STATEMENT OF DISABILITIES**

The university will provide reasonable accommodation of academically qualified students with disabilities, so those students can participate fully in the university’s educational programs and activities. Although USC is not required by law to change the “fundamental nature of essential curricular components of its programs in order to accommodate the needs of disabled students,” the university will provide reasonable academic accommodation. Any student requesting academic accommodations based on a disability is required to register with Disability Services and Programs (DSP) each semester. A letter of verification for approved accommodations can be obtained from DSP. Please be sure the letter is delivered to me as early in the semester as possible. DSP is located in STU 301 and is open early; 8:30 am-5:00 pm, Monday through Friday. The phone number for DSP is (213) 740-0776.

**ACADEMIC CONDUCT**

Plagiarism – presenting someone else’s ideas as your own, either verbatim or recast in your own words – is a serious academic offense with serious consequences. Please familiarize yourself with the discussion of plagiarism in *SCampus* under Part B, Section 11, Behavior Violating University Standards and Appropriate Sanctions <https://scampus.usc.edu/1100-behavior-violating-university-standards-and->

[appropriatesanctions](#). Other forms of academic dishonesty are equally unacceptable. See additional information in *SCampus* and university policies on scientific misconduct, <http://policy.usc.edu/scientific-misconduct>.

Discrimination, sexual assault, and harassment are not tolerated by the university. You are encouraged to report any incidents to the Office of Equity and Diversity <http://equity.usc.edu> or to the Department of Public Safety <http://capsnet.usc.edu/department/department-publicsafety/online-forms/contact-us>. This is important for the safety of the whole USC community. Another member of the university community – such as a friend, classmate, advisor, or faculty member – can help initiate the report, or can initiate the report on behalf of another person. The Center for Women and Men <http://www.usc.edu/student-affairs/cwm/> provides 24/7 confidential support, and the sexual assault resource center webpage <http://sarc.usc.edu> describes reporting options and other resources.

### **SUPPORT SYSTEMS**

A number of USC's schools provide support for students who need help with scholarly writing. Check with your advisor or program staff to find out more. Students whose primary language is not English should check with the American Language Institute <http://dornsife.usc.edu/ali>, which sponsors courses and workshops specifically for international graduate students. The Office of Disability Services and Programs [http://sait.usc.edu/academicsupport/centerprograms/dsp/home\\_index.html](http://sait.usc.edu/academicsupport/centerprograms/dsp/home_index.html) provides certification for students with disabilities and helps arrange the relevant accommodations. If an officially declared emergency makes travel to campus infeasible, USC Emergency Information <http://emergency.usc.edu> will provide safety and other updates, including ways in which instruction will be continued by means of blackboard, teleconferencing, and other technology.

### **READING / ONLINE DISCUSSION TOPICS**

(Assignments may change later in the semester based on the needs / interests of the students)

#### ***WEEK 1 – MONDAY, JANUARY 7, 2019***

**Required Reading:** Review Dr. Culley's Course Workbook

**Online Discussion:** Student Introductions

List the question then your response so it's easy to follow.

1. Full or part time student? What program are you in?
2. Do you work? Where? How long? Full / part time?
3. Title / role, briefly describe what you do.
4. Background/something personal; family, interests outside of school / work.
5. What are your hopes / expectations for this class?
6. What, if any experience do you have doing strategic planning?
7. What, if any concerns do you have in taking this class?
8. How do you hope to use or apply strategic plans – personally, organizationally, not sure?
9. Share observations about the composition of the students in the class.

**WEEK 2 – MONDAY, JANUARY 14, 2019**

**Required Reading:** Michael Porter; “What is Strategy” in *HBR 10 Must Reads on Strategy*.

**Online Discussion:** Strategy.

Answer A, B, and C:

- A. Discuss the concept of differentiation. Why is it critically important to organizations?
- B. Compare and contrast operational effectiveness from strategic positioning.
- C. Identify a local, state or federal government entity or nonprofit organization that has a current strategic plan; and what do they do to differentiate themselves from other comparable organizations?

**WEEK 3 – MONDAY, JANUARY 21, 2019**

**Required Reading:** Austin, Wanda, *Making Space, Strategic Leadership for a Complex World*.

Introduction, Chapters 1 and 2.

**Online Discussion:** Dr. Austin states the “foundation for leading and organizing is by focusing” on four things.

- A. Identify and describe what each of these things are.
- B. Why are they important to leaders?
- C. Which of the four is critical to transitioning from concept to action? Elaborate and explain.

**WEEKS 4 AND 5 ARE IN-CLASS SESSIONS****FRIDAY, FEBRUARY 1, 2019****CLARIFYING / UNDERSTANDING: CORE CONCEPTS OF STRATEGIC PLANNING****Required Reading:**

- Course Reader: Introduction and Overview
- SWOT Analysis I: Looking Outside for Threats and Opportunities” *Harvard Business Essentials, Strategy: Create and Implement the Best Strategy for Your Business*, Chapter One. HBR Press Books, June, 2005

**SATURDAY, FEBRUARY 2, 2019****DEVELOPING VISION, VALUES AND MISSION FOR ORGANIZATIONS****Required Reading:**

- SWOT Analysis II: Looking Inside for Strengths and Weaknesses” *Harvard Business Essentials: Strategy: Create and Implement the Best Strategy for Your Business*, Chapter Two. HBR Press Books, Boston, June, 2005

**SUNDAY, FEBRUARY 3, 2019****ESTABLISHING GOALS / STRATEGIES / TACTICS****Required Reading:**

- Course Workbook: Sections on Goals, Strategies, Tactics
- *Harvard Business Review, 10 Must Reads on Strategy*. HBR Press Books, Boston, 2011.  
(First two articles by Michael Porter only).
- Distribute Second Assignment – due **Sunday, February 24, 2019**

**WEEK 6 - MONDAY, FEBRUARY 11, 2019****Online Discussion:** Strategic Plan Project Team Experience

- A. Identify the organization and members of your Strategic Plan (SP) Project Team.
- B. Describe your role, responsibilities and the initial focus of your individual work.
- C. How are you going to integrate what you are doing individually with the rest of the team?
- D. What method(s) of communication / interaction have been established to keep the team aligned?
- E. What, if any, challenges / concerns do you have as you're progressing individually / as a team?

**WEEK 7 – MONDAY, FEBRUARY 18, 2019****Required Reading:** Pine, Joseph and James Gilmore. The Experience Economy. HBR Press, July 2011.**Online Discussion:** The Experience.

- A. Discuss the concepts of economic value and “the experience”.
- B. How is economic value and/or the experience relevant to Strategic Planning?

**WEEK 8 – MONDAY, FEBRUARY 25, 2019****Online Discussion:** Environmental Assessment / Vision, Values, Mission, Goals

- A. As you begin formulating your Strategic Plan, how and to what extent are you utilizing the findings of the Environmental Assessment (completed or partially done) to help shape and influence the development of the Vision, Values, Mission, and Goals?
- B. How are you collaborating as a team to formulate the Vision, Values, Mission, and Goals so it is not done by just one or two people?
- C. What strategies is your team using (now) to ensure that you are producing your draft Strategic Plan and PowerPoint systematically so it doesn't fall on a couple people to complete at the last minute a few days before class meets March 9-10?

**WEEK 9 - IN- CLASS SESSION****FRIDAY, MARCH 8, 2019**

- **REFLECTIONS / SIMULATION / FEEDBACK IN STRATEGIC PLANNING**
- **PROJECT TEAMS - PRESENTATIONS PART I**

**Required Reading: TBD****SATURDAY, MARCH 9, 2019**

- **PROJECT TEAMS - PRESENTATIONS PART II**
- **STRATEGIC PLANNING ACROSS SECTORS**
- **PREPARATION FOR DEVELOPING FINAL DRAFT**

**Required Reading: TBD**

**WEEK 10 – SPRING BREAK****WEEK 11 - MONDAY, MARCH 18, 2019**

**Online Discussion:** The Formulation Phase  
Question - TBD

**WEEK 12 - MONDAY, MARCH 25, 2019**

**Online Discussion:** Implementation and Execution  
Question - TBD

**WEEK 13 – MONDAY, APRIL 1, 2019**

**Online Discussion:** Force Field Analysis and Mini Case Study  
Question - TBD

**WEEK 14 - IN CLASS SESSION****FRIDAY, APRIL 12, 2019**

- **IMPLEMENTATION / EXECUTION**
  - **PROJECT TEAMS – FINAL PRESENTATIONS**
- Required Reading: TBD**

**SATURDAY, APRIL 13, 2019**

- **MONITORING / MEASURING PROGRESS OF STRATEGIC PLANS**
  - **PROJECT TEAMS REQUIREMENTS TO SUBMIT FINAL STRATEGIC PLAN**
- Required Reading: TBD**
- Distribute final paper – due **Friday, May 3, 2019**

**WEEK 15 – MONDAY, APRIL 15, 2019**

**Online Discussion:** Golden Circle / Law of Diffusion of Innovation  
Question - TBD

**WEEK 16 – MONDAY, APRIL 22, 2019**

**Online Discussion:** Strategic Plan Project Teams Final Actions  
Question - TBD

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- **CLASSES END - FRIDAY, APRIL 26, 2019**
  - **STRATEGIC PLANS – TEAM PROJECTS DUE**
    - **WEDNESDAY, MAY 1, 2019 – ONLINE VERSION**
    - **MONDAY, MAY 5, 2019 - BOUND, HARD COPY OF STRATEGIC PLAN AND POWERPOINT**
  - **THIRD AND FINAL PAPER DUE**
    - **FRIDAY, MAY 3, 2019**



**READING LIST****REQUIRED FOR PURCHASE**

1. Harvard Business Reviews, 10 Must Reads on Strategy. Harvard Business Press Books, Boston, 2011.

**HIGHLY RECOMMENDED FOR PURCHASE**

2. Austin, Wanda. Making Space: Strategic Leadership for a Complex World. El Segundo, California, The Aerospace Press, 2016.
3. Pine, Joseph and Gilmore, James. The Experience Economy. Harvard Business Review Press, July 2011.
4. Kim, W. Chan and Mauborgne, Renee. Blue Ocean Strategy. Harvard Business Review Press, 2005.

**REQUIRED READINGS**

- Bossidy, Larry and Charan, Ram. Execution: The Discipline of Getting Things Done. Crown Business, 2009.
- Christiansen, Clayton. “How Will You Measure Your Life?” Harvard Business Review. July/August 2010 (46-51).
- Collins, James Porras, Jerry. “Building Your Company’s Vision” HBR 10 Must Reads On Strategy. (77-102).
- Kaplan, Robert, Norton, David. “Mastering the Management System. Harvard Business Review, January 2008 (63-77).
- Kaplan, Robert Norton, David. “Using the Balanced Scorecard as a Strategic Management System.” HBR 10 Must Reads On Strategy (167-190).
- Kim, W. Chan and Mauborgne, Renee. Blue Ocean Strategy. Harvard Business Review Press, 2005.
- Kotter, John “Leading Change” Why Transformation Efforts Fail.” Harvard Business Review Jan, 2007.
- Mendenhall, Mark, Pryor, M. “Strategic Planning Failure.” Available at: <http://www.referenceforbusiness.com/management/Sc-Str/Strategic-Planning-Failure.html>

**REQUIRED READINGS - CONTINUED**

- Gary L Neilson, Karla L Martin, Elizabeth Powers. “The secrets to successful strategy execution” HBR 10 Must Reads On Strategy. (143-166)
- Pine, Joseph and James Gilmore. The Experience Economy. Harvard Business Review Press, July 2011.
- Porter, Michael; “The Five Competitive Forces that Shape Strategy” in HBR 10 Must Reads on Strategy.
- Porter, Michael; “What is Strategy” in HBR 10 Must Reads on Strategy.
- Taleb, Nassim Nicholas. The Black Swan: The Impact of the Highly Improbable. Second Edition. Random House, New York, 2010.
- “Developing a Vision and Strategy, Overcoming Barriers to Organizational Change” from: Kotter, John. Leading Change. Chapter 5. Harvard Business Press Books, Boston, 1996
- SWOT Analysis I: Looking Outside for Threats and Opportunities” Harvard Business Essentials, Strategy: Create and Implement the Best Strategy for Your Business, Chapter One. Harvard Business Press Books, June, 2005
- SWOT Analysis II: Looking Inside for Strengths and Weaknesses” Harvard Business Essentials: Strategy: Create and Implement the Best Strategy for Your Business, Chapter Two. Harvard Business Press Books, Boston, June, 2005
- Course Reader. Rick Culley, Ph.D. Institute for Executive Development, 2016.

**SUGGESTED READINGS**

Martin, Roger, “The Execution Trap” Harvard Business Review. July/August 2010 (64-75)

Kaplan, Robert Norton, David, “Integrating Strategy Planning and Operational Execution: A Six-Stage System” Harvard Business Review May, 2008