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**Thinking, Planning and Acting Strategically**

**In the Community Sector**

**PPAI 2350-S01 - Fall 2014**

**Tuesday /Thursday, 2:30AM to 3:50, Walter Wilson 301**

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**Course Description**

Strategy, with historical roots in the military and business, is a core element of success for community organizations. The complexity of community challenges, speed of change and financial pressures are just some of the factors that have shifted approaches to strategy development in recent years. Organizations must balance intentional commitments with astute adaptation to changing circumstances. Nonprofits must develop internal strategy capabilities to persistently fine tune focus, inform decisions and seize opportunities. Strategic leadership must be contributed by all roles.

Furthermore, technology is enabling unprecedented access to information and networks and supporting new ways to work. Nonprofits have the potential to engage consumers, stakeholders and partners to co-create strategy. Collaboration can improve the quality of decision-making, implementation, evaluation and learning.

This course will focus on strategy trends and issues related to the community sector. We will address the role of strategic planning and strategic thinking as fundamental tools of nonprofit institutions to build high performance organizations and achieve social impact. The course is also designed to support students in acquiring a mastery of practical skills in strategic planning and thinking.

**Course Objectives**

Knowledge

1. To understand key concepts of strategic thinking, acting and planning for the community sector amidst complexity and uncertainty: why strategy is important; strategy components; and how to develop strategy
2. To understand who is responsible for strategy and how participatory approaches to strategy development and assessment affect decision making, implementation and outcomes
3. To understand approaches to balance strategic commitments *and* adapt to changing circumstances
4. To appreciate institutional strategy as a contributor to community and social change

Skills

1. To acquire skills related to strategic thinking, acting and planning
2. To acquire skills in developing and implementing a strategic planning process with an emphasis on internal and external research/assessment, analysis, communications, systems thinking and evaluation

Values Framework

1. To promote inclusive, participatory processes
2. To enhance effectiveness (quality), efficiency (productivity) and innovation for mission impact
3. To promote transparency and accountability
4. To develop organizational strategies that strengthen social, economic and environmental justice

**Required Course Materials** (CANVAS will list updated reading assignments during the semester)

Books

Allison, Michael and Kaye, Jude, (2005), *Strategic Planning for Nonprofit Organizations*, Wiley.

Collins, Jim, *Good to Great and the Social Sectors,* Monograph, 2005.

La Piana, David. (2008) *The Nonprofit Strategy Revolution: Real-Time Strategic Planning in a Rapid-Response World*, St. Paul Minnesota, Fieldstone Alliance.

Harvard Business School Press Coursepack

Follow this link to purchase the required case studies for this course from the Harvard Business School Coursepack which has been set up for this course: [http://cb.hbsp.harvard.edu/cb/access/](http://cb.hbsp.harvard.edu/cb/access/14547571).

Additional Readings and Cases

All other materials will be available through the course site on CANVAS.

### Course Requirements and Grading

*Class Participation (15%)*

This class requires active participation and engagement by each student and it is required to read all assignments before every class. Students are expected to articulate understanding of concepts and further develop ideas and applications, building on themes throughout the course. Good questions are sometimes better than good answers. The quantity and quality of participation will be assessed. Attendance is required, and grades will reflect unexcused or excessive absence.

*Student Blogging and Class-led Discussion (10%)*

*Blogging and Student-Directed Discussion* **(submissionsdue by 4:00 PM the day before each class in CANVAS).**

1. Students will periodically write “take-aways” in bulleted format to synthesize themes from previous class. Class will start with a five-minute student led reflection of ‘take aways’ from the prior class.
2. Students will periodically postbrief blog entries with insights on assignments to analyze concepts, connect topics, raise questions and offer critique (not simply summarize material). This will also be a forum to share related articles or material from outside the class to amplify concepts and examples.

*Case Analysis: Strategic Thinking Paper (15%)*

Students will be required to apply theory and practice of **strategic thinking** to an assigned case (approximately 5 pages).

* Identify key decisions that were made by stakeholders in this case.
* Analyze the quality of decision-making using strategic thinking theory and practice.
* What would you have done differently using strategic thinking theory and practice?
* Identify the trends and issues impacting the organization and stakeholders in this case and how these should be factored into strategic decision-making.

*Strategic Plan Analysis Paper (20%)*

1. Select organization that has completed a strategic plan within last three years and obtain a copy of the plan.
2. **Assignment A** (10%)

Determine the reasons why the agency undertook strategic planning. Have conditions changed since report was published? How has agency responded? (3-5 pages).

1. **Assignment B** (10%)

Compare and contrast the strategic plan with approaches presented from class. Critically analyze the strengths and weaknesses of the plan. Was the analysis effectively focused? Identify what you believe has been the impact that the plan has had on the performance of the nonprofit organization and cpmmunity. (5-8 pages).

*Group Project – Synthesizing and Communicating Strategy (10%)*

Small groups will be assigned. Groups will choose a campus-based entity to research and interview a leader to:

1. Identify core strategic issues facing the organization/project and drivers (internal/external)
2. Clarify strategic priorities

This research will be synthesize in a 1 page ‘infographic’ and presented in a brief ‘pitch’ in class

*Final Paper and Presentation: Develop a Strategic Plan (30%)*

This course aims to support students to develop practical skills related to strategic planning. To this end, students will select a nonprofit organization or major program within an organization and **will build and develop a strategic plan based on the organization selected**. More details on this assignment will be discussed in class and advice provided on how to approach this assignment, given the limited time available in the semester.

Steps:

* Select a nonprofit organization and submit this selection for approval. This organization could be the one you selected for the analysis assignment or a different one.
* Review the strategic planning processes detailed in course materials. Develop a strategic plan for the organization or program selected drawing on these references. Select what you believe are the most valuable steps and tools for planning. Explain and support you decisions; include worksheets to back up the plan
* Prepare a ten-page paper detailing the plan.
* Prepare a 15 minute presentation on your plan. Presentations will take place during the last 3 class sessions. Presentations will be graded on content and delivery. Each presentation will be followed by brief Q/A and discussion.

**Policies**

*Assignment Submissions*

Assignments are due at the prescribed date/time. Blogs and papers should be uploaded to CANVAS. Late assignments will be accepted only with pre-approval from the instructor but the grade will be adjusted (10%) to reflect the missed deadline. Assignments submitted more than one week from the due date/time will not be accepted. With prior written (email) approval from the instructor, an assignment will be accepted until midnight on the due date without grade penalty.

*Absences*

If you won’t be in class, you are expected to e-mail Professor ahead of time and submit any required assignments that may be required in advance of the class. If you are ill and recover, please submit required pre-class assignments within a week of your return to class. Failure to notify the faculty about illness or absence in advance will impact your grade.

*Laptops/Cell phones*

Laptops are welcome for note taking. Don’t be distracted by other tasks. I expect you to be actively engaged and single tasking. Cell phones are not welcome.

COURSE OUTLINE

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| WEEK | DATE | TOPIC | ASSIGNMENTS |
| 1 | 9/4 | **Course Overview**  What is strategy and why is it important?  Course expectations | Readings and assignments must be completed **PRIOR** to class.  **CANVAS** will have updated assignments. |
| 2 | 9/9 | **What is Strategy?**  Historical roots  Strategy in a complex and unpredictable world  Case: The Deadly Choices at Memorial | The Origin of Strategy, Rich Horwath, Strategic Thinking Institute, 2006  Why David Sometimes Wins: Strategic Capacity in Social Movement, Marshall Ganz, The Psychology of Leadership Journal, 2005  Blog: Porter or Mintzberg: Whose View of Strategy is the most Relevant Today?, Forbes, K Moore, 2011  Blog: The Strategic Plan is Dead. Long Live Strategy, D. O’Donovan & N. Rimland Flower, SSIR, 1/10/13  Case: Deadly Choices at Memorial |
| 3 | 9/11 | **Why Strategy?**  Begin with the end: impact and sustainability  Influencing systems  Strategy implementation - managing change  Case: The Justice Project, Bridgespan | Good to Great and the Social Sectors, Collins  Systems Thinking and Complexity 101, Dave Pollard, 2014  Creating High Impact Nonprofits, SSIR, McLeod Grant & Crutchfield, [Fall 2007](http://www.ssireview.org/issue/fall_2007)  Blog, It’s Not the Change, it’s the Transition, Chris Conrad on 3/10/14  Case: The Justice Project   * Bridgespan * Postscript by MJ Kaplan; prepare to discuss questions |
| 4 | 9/16 | **Strategic Thinking**  What it is  How to do it | Strategic Thinking: What it Is and How to Do It, Thinking Futures, 2014  Strategic Thinking: Can it be Taught? Jeanne Liedtka, 1998  Blog, Six Habits of Strategic Thinkers, Paul Shoemaker, Inc., 3/20/2012. Optional: Complete free assessment, [www.decisionstrat.com](http://www.decisionstrat.com/) |
| 5 | 9/18 | **Case**  Sapientis | The Art of Powerful Questions, E. Vogt, J. Brown & D. Isaacs, 2003  Becoming a Strategic Leader, R.L. Hughes, K.Colarelli Beatty, D.L. Dinwoodie, chapter 1, What is Strategic Leadership?, Library Reserves  Case: Sapientis and the Launch of CECE (HBSP coursepack) |
| 6 | 9/23 | **Acting Strategically**  **Guest – Hillary Salmons, PASA** | Strategic Thinking Case Analysis Paper Due, Year Up: A Social Entrepreneur Build High Performance (HBSP coursepack)  Crafting Strategy, Henry Mintzberg, HBR, July, 1987 (HBSP coursepack)  PASA background materials |
| 7 | 9/25 | **Who Drives Strategy?**  Accountability  Co-creation: emerging trends and tools | Boards as an Accountability Mechanism, F. Ostrower, University of Texas, May 2014  When a New Strategic Direction Means a New Board, Bridgespan  [Use It or Lose It: Frittering Away Civil Society’s Strategic Advantage](https://nonprofitquarterly.org/management/21245-use-it-or-lose-it-frittering-away-civil-societys-strategic-advantage.html), Ruth McCambridge, NPQ, 10/25/12  Blog, People, Power and Accountability, Jeremy Nicholls, SSIR, June 23, 2014  Everyone Leads, Building Leadership from the Community Up, Paul Schmitz, Chapter 3, Library Reserves  Harnessing Collaborative Technologies, Monitor Institute and Foundation Center, 2013 |
| 8 | 9/30 | **Strategy Frameworks** | La Piana Preface - Ch. 4  Risky Business: How The William and Flora Hewlett Foundation approaches high-risk philanthropic ventures, Paul Brest, SSIR, Summer 2012 |
| 9 | 10/2 | **Guest - Michael Allio** | Select organization / strategic plan for paper #2  TBA |
| 10 | 10/7 | **Strategy Process – Laying the Foundation** | Allison and Kaye, Ch. 1 – 3  La Piana, revisit Ch. 4 pp. 45-52 |
| 11 | 10/9 | **Strategic Analysis : External Environment and Competitive Advantage/Niche**  Environmental scanning and market analysis  Competitive Advantage | Allison and Kaye, Ch. 4  La Piana, revisit Ch. 4 pp. 53-60 |
| 12 | 10/14 | **Partnerships**  **Guest- Kathleen Pletcher, Executive Artistic Director, First Works (T)** | Strategic Plan Analysis Paper – Part A Due  Collective Impact, Kania & Kramer, SSIR, 2011  Strategic Alliances, [David Kryscynski](https://www.youtube.com/channel/UCWTkiJfJVlCJUyPJn7SHVLg) https://www.youtube.com/watch?v=bk\_-rIYzg74 |
| 13 | 10/16 | **Strategy Screens - Criteria, Mandates, Risk**  American Reparatory Theatre | La Piana, Ch. 5  Allison and Kaye, CH. 5  American Reparatory Theatre (HBSP coursepack) |
| 14 | 10/21 | **Core Questions and Decision Making** | Strategic Plan Analysis Paper – Part B Due  La Piana Ch. 6  What If? The Art of Scenario Thinking for Nonprofits, Global Business Network, 2004 |
| 15 | 10/23 | **Strategic Choices**  **Guest - Janet Coit, Director, RI Department Environmental Management** | Assignment preparation for group project – strategic choices  The Spiral of Sustainable Excellence, P. Light, Nonprofit Quarterly, 12/21/04 |
| 16 | 10/28 | **Implementation** | La Piana Ch. 7, 8, 9  Bridgespan - Living Into Your Strategic Plan: A Guide to Implementation that Gets Results |
| 17 | 10/30 | **Communicating the Strategy Story and Plan** | Allison and Kaye, Ch. 6  Group Presentations |
| 18 | 11/4 | **Measure Results** | Blog, Evaluation’s Next Generation, [Srik Gopalakrishnan](http://www.ssireview.org/blog/entry/evaluations_next_generation#bio-footer), SSIR, Oct. 2, 2013  Using Imperfect Measures Well: Tracking Progress and Driving Change, Eugene H. Fram and Jerry L. Talley, Nonprofit Quarterly, July 24, 2012  Results Now for Nonprofits: Strategic, Operating and Governance Planning, Mark Light, 2011, Ch. 7  Success measures pp. 73-82 (Brown library)  City Year: The Journey, May 2012 (HBSP coursepack) |
| 19 | 11/20 | **Learn and Adapt** | Building Adaptive Capacity, Carl Sussman, 2004 |
| 20 | 11/25 | **Strategy in Action** | Brown University strategic plan |
|  |  | Thanksgiving |  |
| 21 | 12/2 | **Presentations** |  |
| 22 | 12/4 | **Presentations** |  |
| 23 | 12/9 | **Presentations** |  |
| 24 | 12/11 | **Closure** |  |