I. COURSE DOMAIN AND BOUNDARIES

This one-credit skill lab will examine strategic planning and strategic management in human services. Students will understand competitive organizational strategy, various models of strategic planning, and the basics of strategic management.

Students will develop skills in choosing and designing appropriate planning models and planning processes, conducting SWOT analyses and organizational assessments, and defining mission and vision. Additionally, students will formulate strategic goals, translate strategy into ongoing management, and explore monitoring and evaluation processes.

Pedagogy will include readings, lectures, in-class discussions, case studies and active learning exercises. This course fulfills one credit in Leadership/Management.

II. MSW COMPETENCIES ADDRESSED IN THIS COURSE

| Demonstrate Ethical and Professional Behavior | C1 | Emphasized |
| Engage in practice-informed research and research-informed practice | C4 | Emphasized |
| Engage with individuals, families, groups, organizations, and communities | C6 | Reinforced |
| Assess individuals, families, groups, organizations, and communities | C7 | Emphasized |
| Intervene with individuals, families, groups, organizations, and communities | C8 | Emphasized |
| Evaluate individuals, families, groups, organizations, and communities | C9 | Reinforced |

III. BROWN SCHOOL ACADEMIC POLICIES

**Academic Integrity:** If a faculty member or student suspects that academic or professional integrity has been violated, they are required to submit an Academic Integrity or Professional Integrity Violation form found on Inside Brown for review by the Assistant Dean of the program. The Assistant Dean or designated representative will
aid in the investigation of the violation, which includes but is not limited to gathering relevant evidence; conversations with the instructor, student(s) involved, witnesses, and others as necessary. Depending on the seriousness of the case, the Assistant Dean may choose to refer the matter directly to the University Student Conduct Board. This referral procedure will generally be followed if it is believed that the penalty is likely to involve suspension or expulsion from the University. The Assistant Dean for the program or designated representative will offer to meet privately with the student(s) against whom the complaint has been made. It is the student’s responsibility to familiarize themselves with the behaviors that constitute an academic integrity violation requiring referral.

Student Handbook 2019

Accommodations: If you have a learning, sensory, or physical disability or any other diagnosis that requires accommodations and/or assistance in lectures, reading, written assignments, and/or exam taking, please work with the Disability Resource Center, a University-wide resource that provides academic accommodations support and referrals. After requesting academic accommodations by providing appropriate documentation, students approved for accommodations will provide an Accommodation Letter to the instructor and are encouraged to work directly with the instructor to discuss specific course needs. The student’s Academic Advisor and/or the Assistant Dean for Academic Affairs can support a student through this process.

Pronouns: The Brown School embraces and promotes gender expansiveness as reflective of the lived experiences of many students, staff, faculty and members of our expanded community. The correct use of an individual’s pronouns is a critical part of an individual's identity and of building an inclusive community. Students, faculty and staff are encouraged to use pronouns during introductions, are expected to use expressed pronouns of all Brown School community members, and are encouraged to apologize when mistakes are made. Educational resources are available at: https://campuslife.wustl.edu/lgbtqia/lgbt-resources/gender-pronouns/

Professional Use of Electronic Devices in the Classroom: Computers or other electronic devices, including “smart pens” (devices with an embedded computer and digital audio recorder that records the classroom lecture/discussion and links that recording to the notes taken by the student), may be used by students at the discretion of the faculty member to support the learning activities in the classroom. These activities include taking notes and accessing course readings under discussion. If a student wishes to use a smart-pen or other electronic device to audio record lectures or class discussions, they must notify the instructor in advance of doing so. Permission to use recording devices is at the discretion of the instructor, unless this use is an accommodation approved by Disability Resources.

Nonacademic use of laptops and other devices and use of laptops or other devices for other coursework is distracting and seriously disrupts the learning process for other people in the classroom. Neither computers nor other electronic devices are to be used in the classroom during class for nonacademic reasons or for work on other
coursework. Nonacademic use includes emailing, texting, social networking, playing games, instant messaging, and use of the Internet. Work on other coursework may include, but is not limited to, use of the Internet, writing papers, using statistical software, analyzing data, and working on quizzes or exams. The nonacademic use of cell phones during class time is prohibited, and they should be set on silent before class begins. In the case of an emergency, please step out of the room to take the call. The instructor has the right to hold students accountable for meeting these expectations, and failure to do so may result in a loss of participation or attendance points, a loss of the privilege of device use in the classroom, or being asked to leave the classroom.

Religious Holidays: The Brown School recognizes the individual student’s choice in observing religious holidays that occur during periods when classes are scheduled. Students are encouraged to arrange with their instructors to make up work missed as a result of religious observance, and instructors are asked to make every reasonable effort to accommodate such requests.

Accommodations based upon sexual assault: The University is committed to offering reasonable academic accommodations to students who are victims of sexual assault. Students are eligible for accommodation regardless of whether they seek criminal or disciplinary action. Depending on the specific nature of the allegation, such measures may include but are not limited to: implementation of a no-contact order, course/classroom assignment changes, and other academic support services and accommodations. If you need to request such accommodations, please direct your request to Kim Webb, Director of the Relationship and Sexual Violence Prevention Center, or Jen Durham Austin, Support Services Counselor. Both Kim Webb and Jen Durham Austin are confidential resources; however, requests for accommodations will be shared with the appropriate University administration and faculty. The University will maintain as confidential any accommodations or protective measures provided to an individual student so long as it does not impair the ability to provide such measures.

If a student comes to me to discuss or disclose an instance of sexual assault, sex discrimination, sexual harassment, dating violence, domestic violence or stalking, or if I otherwise observe or become aware of such an allegation, I will keep the information as private as I can, but as a faculty member of Washington University, I am required to immediately report it to my Department Chair or Dean or directly to Ms. Jessica Kennedy, the University’s Title IX Director. If you would like to speak with directly Ms.Kennedy directly, she can be reached at (314) 935-3118, jwkennedy@wustl.edu, or by visiting the Title IX office in Umrath Hall. Additionally, you can report incidents or complaints to the Office of Student Conduct and Community Standards or by contacting WUPD at (314) 935-5555 or your local law enforcement agency. See: Title IX

You can also speak confidentially and learn more about available resources at the Relationship and Sexual Violence Prevention Center by calling (314) 935-3445 for an appointment or visiting the 4th floor of Seigle Hall. See: RSVP Center

Bias Reporting: The University has a process through which students, faculty, staff and community members who have experienced or witnessed incidents of bias, prejudice or
discrimination against a student can report their experiences to the University’s Bias Report and Support System (BRSS) team. See: brss.wustl.edu.

**Mental Health:** Mental Health Services’ professional staff members work with students to resolve personal and interpersonal difficulties, many of which can affect the academic experience. These include conflicts with or worry about friends or family, concerns about eating or drinking patterns, and feelings of anxiety and depression. See Mental Health Resources.

**Center for Diversity and Inclusion (CDI):** The Center of Diversity and Inclusion (CDI) supports and advocates for undergraduate, graduate, and professional school students from underrepresented and/or marginalized populations, creates collaborative partnerships with campus and community partners, and promotes dialogue and social change. One of the CDI's strategic priorities is to cultivate and foster a supportive campus climate for students of all backgrounds, cultures and identities. See: diversityinclusion.wustl.edu/

**Additional Issues or Concerns:** If you feel that you need additional supports in order to be successful in your time at Brown, beyond the mentioned accommodations, please contact your Academic Advisor or Danielle Bristow, Assistant Dean for Academic Affairs. They can assist you in navigating a myriad of concerns.

**V. READINGS**

Assigned readings and case studies play an important role in this course. They are all available on CANVAS.

- Strategic plan, a guide for managers from the United Nations
  https://hr.un.org/sites/hr.un.org/files/4.5.1.6_Strategic%20Planning%20Guide_0.pdf

- Things to include in a strategic plan template (2013)
  https://www.forbes.com/sites/davelavinsky/2013/10/18/strategic-plan-template-what-to-include/#6d781b4a47e1

- Example of strategic plan (2017)

- Strategic Planning in Population Health and Public Health Practice: A Call to Action for Higher Education (2016)

- What the Best Nonprofits Know About Strategy

**VI. ORGANIZATION OF COURSE**
The course will be offered over a weekend with an essay due before the block. The classes will be conducted in an interactive mode combining lectures, discussions, small group exercises, case studies, and outside speakers.

VII. ROLE OF FACULTY AND STUDENT

The instructor will be responsible for organizing the course in a progressive and understandable manner, communicating essential information, and arranging speakers, demonstrations, exercises, case studies, and simulations. The instructor will answer student questions, facilitate discussions, and challenge students to explore and consider difficult concepts. The instructor will draw on her professional experience and encourage the students to likewise share their experiences, within an environment of confidentiality. The instructor will be available before and after class, during breaks and by appointment or via phone or e-mail to answer questions, clarify assignments and provide guidance.

The students will be responsible for attending all classes and arriving prepared and on-time, having read all required readings, prepared for class discussion and completed all assignments on time.

Because this is an abbreviated class, student absences are extremely disruptive to the learning process. Students should not enroll in this class unless they expect to attend all class sessions. A student must attend all class sessions to earn course credit.

The student’s active participation in class discussion and group exercises is required. Students will be assessed on their class participation as well as their preparedness for class (see Class Participation assignment below).

VIII. ASSIGNMENTS AND GRADING CRITERIA

Grades are based on a maximum of 100 points. In general, grading will assess 1) the degree to which the student acquires knowledge and understanding of the course material (readings, lectures, theory, practice guidelines etc.) and 2) the student’s skill and ability in applying this knowledge to hypothetical and real-life cases and practice situations.

Final course grading is as follows:

<table>
<thead>
<tr>
<th>Points Range</th>
<th>Grade</th>
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<tbody>
<tr>
<td>95 – 100</td>
<td>A</td>
</tr>
<tr>
<td>90 – 94</td>
<td>A-</td>
</tr>
<tr>
<td>87 – 89</td>
<td>B+</td>
</tr>
<tr>
<td>84 – 86</td>
<td>B</td>
</tr>
<tr>
<td>80 – 83</td>
<td>B-</td>
</tr>
<tr>
<td>77 – 79</td>
<td>C+</td>
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<tr>
<td>74 – 76</td>
<td>C</td>
</tr>
<tr>
<td>70 – 73</td>
<td>C-</td>
</tr>
<tr>
<td>Below 70</td>
<td>F</td>
</tr>
</tbody>
</table>
1) Framing Short Paper (35% of grade) / Due November 7th 12 (Noon)

Students will prepare a 4-page paper demonstrating knowledge of the readings and familiarity with the Brown Strategic Planning process from https://brownstrategicplan.wustl.edu. A specific prompt and further information will be sent out to registered students the first week of October.

2) Professionalism and Participation (30% of grade):

Students will be assessed on their class participation as well as their preparedness for class. Classroom participation is one way in which the instructor can assess whether the student is acquiring and understanding the knowledge and skills contained in the course.

• Students are expected to arrive to class having read or completed all assignments and prepared to engage with the material. Students are expected to direct their full attention to the class.
• Attendance matters and will be considered as part of the classroom participation grade. Students should not enroll in this class unless they expect to attend all class sessions. A student must attend all class sessions to earn course credit.
• Class participation is essential to demonstrate learning. The student's active participation in class discussion and small group exercises is required. Students are expected to participate during each session. Students are expected to ask and answer questions; offer observations, ideas and opinions; respectfully challenge the opinions of others; and offer examples and illustrations from their own experience. The instructor may call on students to answer questions.
• Students are expected to seek clarification of material or concepts they do not understand and provide feedback to the instructor on ways that the class can be improved, including completing scheduled course evaluations.

Students will be graded on the following criteria:
• Attendance
• Pays attention and is fully engaged and participates in each class session
• Contributes to a positive, safe and enjoyable learning environment
• Provides feedback to the instructor on ways that the class can be improved, including completing scheduled course evaluations
• Demonstrates knowledge and understanding of course material by responding accurately to questions posed by the instructor
• Offers thoughtful, respectful, insightful and relevant opinions, observations, and examples during class discussions
• Asks thoughtful, probing and relevant questions during class discussions

5) Simulated Strategic Plan Group Project (35% of grade) / Due: November 17 (end of day)

Small groups of students will be given the outline of a fictional agency and will be tasked
with developing a strategic plan that includes: vision, mission, core values, SWOT/SOAR analysis, 3-5 goals/objectives, and activities for each goal/objective. A short amount of time will be given at the end of Saturday’s class for students to apply what was learned during the class toward completing their group project. Groups will have 15 minutes to present and defend their strategic plan on Sunday afternoon.

IX. MSW COMPETENCY ALIGNMENT TO ASSIGNMENTS AND COURSE ACTIVITIES

<table>
<thead>
<tr>
<th>GRADED ASSIGNMENTS</th>
<th>Competency/ies</th>
<th>Dimension/s</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required Reading</td>
<td>C4</td>
<td>Cognitive &amp; Affective Processes</td>
</tr>
<tr>
<td>Professionalism &amp; Participation</td>
<td>C1</td>
<td>Skills</td>
</tr>
<tr>
<td>Short Paper (What Makes for Strong Vision, Mission, &amp; Core Values Statements?)</td>
<td>C1, C4, &amp; C9</td>
<td>Knowledge, Skills, and Cognitive &amp; Affective Processes</td>
</tr>
<tr>
<td>Long Paper (Strategic Plan Assessment)</td>
<td>C6, C7, C8, &amp; C9</td>
<td>Knowledge, Skills, and Cognitive &amp; Affective Processes</td>
</tr>
<tr>
<td>Group Project (Simulated Strategic Plan)</td>
<td>C4, C7, C8</td>
<td>Knowledge, Skills, and Cognitive &amp; Affective Processes</td>
</tr>
</tbody>
</table>

X. COURSE OUTLINE

**Session 1 – Saturday morning – What is Strategic Planning?**
In this session, we will define the purposes of strategic planning and explore/contrast two different approaches. We'll also explore the importance of laying a strong foundation through clear vision and mission statements as well as organizational core values.

The group project will be assigned. Small groups will be given the outline of a fictional agency and will be tasked with developing a strategic plan. A short amount of time will be given at the end of each class for students to use what was learned during the class and use toward completing their group project.

**Session 2 – Saturday afternoon – Understanding the Environment**
In this session we will learn how to conduct SWOT and SOAR analyses, understand the differences between them, and what you need to know before starting the analysis. Groups will have a short amount of time to work on their group assignment, using what was learned during the class to develop either a SWOT or SOAR analysis.

**Session 3 – Sunday morning – Organization, Know Thy Self**
In this session we will learn about the importance of understanding your organization’s Theory of Change, business model, organizational capacity, and leadership strength. We will refer to the Brown School strategic planning process to explore engaging stakeholders in this process.

**Session 4 – Sunday afternoon – Developing and Executing a Strategic Plan**
In this session, we will learn about how to use strategic planning as a management tool for an organization and the role of dashboards. Groups will present their group project to the class.