

STRATEGIC PLANNING AND PERFORMANCE MANAGEMENT

Spring 2010

Course Information

Course Number: 20-834-524
Date: Mondays, Jan 25 – May 3
Time: 5:30-8:10 PM
Location: CPS-201

Instructor Information

Sunjoo Kwak
Cell Phone: 201-336-2556
Email: sjkwak@pegasus.rutgers.edu

Course Overview

This course is aimed at:

1. Understanding the basic concepts of strategic planning and performance management.
2. Identifying the major factors that affect the effectiveness of strategic management.
3. Acquiring knowledge and tools necessary to implement effective strategic planning and performance measurement.

Required Textbooks

John M. Bryson. 2004. *Strategic Planning for Public and Non-Profit Organizations*. San Francisco: Jossey-Bass.

Mark H. Moore. 1997. *Creating Public Value: Strategic Management in Government*. Cambridge, MA: Harvard University Press.

Peter M. Senge. 2006. *The fifth discipline: the art and practice of the learning organization*. New York: Doubleday/Currency.

Additional readings and cases will be posted on Blackboard.

Requirements and Grading

Weekly assignments — 20%: Weekly assignments are two-fold: weekly readings and two-page (double space) paper based on readings assigned and discussions made in a previous session (due at 5pm Sunday). Apply readings and discussions to current issues.

Class participation — 30%: Active in-class participation is critical. Discussion questions will be posted on Blackboard by Sunday noon.

Case summaries — 20%: Two case studies will be reviewed every session. Given the class size, each student should expect to make presentations two or three times throughout the semester.

Final Paper (individual) — 30%: 15-page case study and in-class presentation (due on May 3). Study proposals will be presented in Session 7.

Academic Integrity

Violations of academic integrity including plagiarism will be handled based on the *Policy on Academic Integrity for Undergraduate and Graduate Students* (<http://teachx.rutgers.edu/integrity/policy.html>).

WEEKLY TOPICS AND READINGS

0. COURSE OVERVIEW

What are strategy and strategic planning?
Context of and rationale for strategic planning
Introduction to course schedule

1. Strategy Change Cycle & Its Learning Characteristics

Bryson. p. 30–62
Mintzberg et al. 92. Cycles of Organizational Change
Mintzberg. 94. The Fall and Rise of Strategic Planning
Nutt et al. 93. Transforming Public Organizations with Strategic Management and Strategic Leadership

2. Connecting Points & Organizational Mechanism

Locke et al. 02. Building a Practically Useful Theory of Goal Setting and Task Motivation
Ordonez et al. 09. Goals gone wild; the systematic side effects of overprescribing goal setting
Schweitzer et al. 04. Goal setting as a motivator of unethical behavior
Staw et al. 90. Task Revision; A Neglected Form of Work Performance
Bohte et al. 00. Goal Displacement; Assessing the Motivation for Organizational Cheating

Dubnick. 05. Accountability and the Promise of Performance; In Search of the Mechanisms
Lerner et al. 99. Accounting for Accountability
Smith. 95. On the Unintended Consequences of Publishing Performance Data in the Public Sector
Ricucci. 02. Implementing Welfare Reform in Michigan; The Role of Street-Level Bureaucrats

3. Disciplines for Learning

Senge. *The Fifth Discipline: The Art & Practice of The Learning Organization*

4. Defining Public Value

Moore. p. 27–56
Miller et al. *Performance-Based Budgeting*. Introduction
Meyer et al. 02. Achieving Goal Congruence in Complex Environments; The Case of Welfare Reform
Chun et al. 05. Goal Ambiguity in US Federal Agencies

Pandey et al. 06. Political Environment, Organizational Goal Ambiguity and the Public Manager's Role Ambiguity

Bozeman. 02. Public-Value Failure

Moore. 00. Managing for value; Organizational strategy in for-profit, nonprofit, and governmental organizations

Moore. 03. The Public Value Scorecard

Moore. 05. Creating public value through private-public partnerships

5. Planning Tools and Techniques I: Organizational and Environmental Assessment

Bryson. p. 123-152

Arrick et al. Scanning the Landscape

<http://www.coloradofunders.org/Docs/UploadedFiles/Scanning%20the%20Landscape.pdf>

Gelatt. Scanning for Megatrends in the Nonprofit World

<http://www.contributionsmagazine.com/featured/scanning.html>

Lusthaus et al. Organizational Assessment for a Framework for Improving Performance. ch. 7

http://books.google.com/books?hl=en&lr=&id=HrfVlz_5HIgC&oi=fnd&pg=PR9&dq=+Organizational+Assessment:+A+Framework+for+Improving+Performance.&ots=ASk7S1SGpu&sig=f_EMo9ct6NiB8Z3EhrdhPfaxxrw#v=onepage&q=&f=false

Varvasovszky et al. 00. How to do (or not to do)... A stakeholder analysis

Bryson. 04. What to Do When Stakeholders Matter; Stakeholder Identification and Analysis Techniques

Courtney et al. 97. Strategy under uncertainty

6. Planning Tools and Techniques II: Formulating Strategies

Bryson. p. 153-237

Moore. p. 57-102

Porter. 96. What Is Strategy

Boyne et al. 04. Strategy Content and Public Service Organizations

Christensen. 97. Making strategy; learning by doing

Godet. 00. The Art of Scenarios and Strategic Planning; Tools and Pitfalls

7. Building Support and Legitimacy

Moore. p. 105-189

Schneider et al. 93. Social Construction of Target Populations

Feldman et al. 02. To Manage is to Govern

8. Delivering Public Value

Moore. p. 192-292

9. Performance Measurement and Benchmarking

Hatry. ch. 5-10

White et al. ch. 13–14

PM in Practice

- Jacksonville Benchmarking Project <http://www.jcci.org/jcciwebsite/snapshot/atlas.html>
- Maxwell Community Benchmarks Program
- North Carolina Performance Measurement Program
- Charlotte Balanced Scorecard <http://www.charmeck.org/Departments/Budget+-+City/Performance+Measures.htm>
- Capitol Region Council of Governments

Thiel et al. 02. The Performance Paradox in the Public Sector

Folz. 04. Service quality and benchmarking the performance of municipal services

Veterans' Benefit Frustrations

<http://www.cbsnews.com/video/watch/?id=6050247n>

No Child Left Behind 2.0

<http://www.onthemedias.org./shows/bl/episodes/2010/03/19/segments/151945>

Community Indicators Consortium Report

10. Linking Performance Measurement to Resource Allocation

Melkers et al. 05. Models of Performance-Measurement Use in Local Governments

Miller et al. 07. Incentives, Certification, and Targets in Performance Budgeting

Scheps. 00. Linking Performance Measures to Resource Allocation

Serritzlew. 06. Linking Budgets to Activity

Willoughby. 02. Performance Measurement Utility in Public Budgeting

11. Strategic Leadership

Moore. p. 293–309

Denhardt et al. 06. The Role of Democratic Values in Transformational Leadership

Vera et al. 04. Strategic leadership and organizational learning

Kim. 02. Participative management and job satisfaction; Lessons for management leadership

12. Effective Communication

Schwarz. 05. The Skilled Facilitator Approach

Irvin et al. 04. Citizen Participation in Decision Making; Is It Worth the Effort

Bryson. 00. Applying large-group interaction methods

Shaw et al. 04. Problem Structuring Methods for Large Group Interventions

White. 02. Size matters; large group methods and the process of operational research

GASB. 03. Reporting Performance Information; Suggested Criteria for Effective Communication