

**University of Wisconsin-Madison**  
**Department of Educational Leadership and Policy Analysis**  
**ELPA 875: Theory and Practice of Educational Planning**  
**Spring, 2009**

***Course Location and Time: Room 1252 Educational Sciences***  
***Wednesdays, 7:15-9:45 p.m.***

**Instructor** Denise Herrmann, Ed.D.

**Contact Information**

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**Office Hours:**

I am generally available before class; please talk to me or email me to arrange a conversation.

**Course Description:**

This is a graduate level course in the theory, research and practice in advanced program planning and evaluation involving elementary, secondary, and higher and post-secondary education. The course provides an opportunity to explore in depth a planning and evaluation strategy by applying a specific planning model to a problem of educational leadership to advance organizational and learning outcomes.

**Course Objectives:**

To develop breadth and depth in understanding of planning methods that guide organizational development in educational programs and organizations. This course provides an opportunity for future educational leaders to become familiar with effective data analysis and planning strategies by applying planning models to educational problems. In this course, students will be introduced to a variety of theories that can explain and guide behavior in any organizational setting. The course will be taught with an emphasis on the development of a learning community engaged in developing a strong foundation of experience using planning and evaluation strategies to provide a foundation for the development of strong and effective learning organizations.

**Course Requirements:**

Regular attendance, thorough class preparation, and active class participation are expected from each student.

The following work will be assessed:

1. Analysis of School Improvement Plan due Feb 11th (15%)
2. Presentation of Planning or Data Tool Due April (20%)
3. Final Planning Project - Written Version due April 29th (35%)
4. Final Planning Project – Oral Presentation due May 6 (15%)
5. Final Planning Project – Reflection due May 13(15%)

### **Challenged Students:**

I wish to fully include persons with disabilities in this course. Please let me know if you need any special accommodations in the curriculum, instruction, or assessments of this course to enable you to fully participate. I will try to maintain the confidentiality of the information you share with me.

### **Required Readings:**

Allison, Michael and Kaye, Jude. (2005). *Strategic Planning for Non Profit Organizations*, 2<sup>nd</sup> edition. New York: John Wiley & Sons.

Brassard, Michael. (1996). *The Memory Jogger Plus*. Methuen, MA: GOAL/QPC.

### **Each student will also be asked to select one of the following texts and apply the principles of this planning approach to educational data:**

Bernhardt, Victoria L. (2003). *Using Data to Improve Student Learning in [Elementary, Middle or High] Schools*. Eye on Education.

Conzemius, Ann & O'Neill, Jan. (2005). *The Power of SMART Goals: Using Goals to Improve Student Learning*. Solution Tree.

Holcomb, Edie (2008). *Asking the Right Questions, Third Edition*. Corwin Press.

*Books may be ordered on line or are available on site from the UW-Madison University Bookstore. For web orders, visit <http://text.uwbookstore.com/home.aspx>. Course readings other than books will be available on electronic reserve (accessed through the UW-Madison website at MY UW).*

### **Other Resources:**

[www.balancedscorecard.org](http://www.balancedscorecard.org)

[www.maqin.org](http://www.maqin.org)

[www.baldrige.nist.gov](http://www.baldrige.nist.gov)

[www.deming.org](http://www.deming.org)

[www.wisc.edu/improve/](http://www.wisc.edu/improve/)

[www.goalqpc.com](http://www.goalqpc.com)

[www.asq.org](http://www.asq.org)

[www.ncrel.org](http://www.ncrel.org)

[www.tregoe.org](http://www.tregoe.org)

[www.aed.org](http://www.aed.org)

[www.nsse.org](http://www.nsse.org)

### **Assignment 1 (Individual): Critique of Existing Strategic Plan (Due February 11)**

Each student will be asked to critique an existing strategic plan from an educational or other non-profit organization. Students will use the seven phases of strategic planning as the framework to critique the overall strengths and weaknesses of the strategic plan. (3-5 pages)

### **Assignment 2 (Partner/Small Group): Quality Tool Presentations (Due April)**

Small groups of students will be assigned to lead a discussion on the key concepts in a phase of the planning process, incorporating a collection of management planning tools to teach the class. The team will integrate the text, tools, and context for the phase from a variety of sources. The presentations will be delivered at various class sessions in March - April. (60 – 90 minutes)

### **Assignment 3 (Individual): Strategic / School Improvement Planning Project – Written Plan (Due May 6th)**

Each student will be asked to develop a strategic / school improvement planning project for an organization of their choice. The comprehensive planning project will include the following components:

- **Comprehensive Planning Work Plan** – document that articulates the “Get Ready” phase - outcomes of the planning process, strategic issues to address, who to involve in the planning and what their roles might be, (use worksheets 1,2, 3, and 4). See p. 68-84 for example
- **Framework for Strategic Plan** – summary of planning tools, activities, and time frame for each phase of planning process - include sample documents as available or the facilitation plan for group to generate such document. See p. 381-388 for example.
- **Draft Operational Plan for Year One** - a detailed implementation plan for first year’s goals and objectives – can use hybrid template
- **Draft Business Plan** – summary of financial implications of the plan – use abbreviated/ modified version of worksheet 17

### **Assignment 4 (Individual): Strategic / School Improvement Project - Oral Presentation to Class of Final Planning Project. (Due May 6th)**

Each student will deliver a 10-15 minutes oral presentation of their planning project that includes a visual presentation tool (Power Point or other)

### **Assignment 5 (Individual): Strategic / School Improvement Project – Reflection of process and product for Final Planning Project (Due May 13th)**

Upon completion of the planning project, each student will write a reflection paper noting the planning content, process skills, and attitudes/leadership perspectives that had the greatest impact on their learning and will guide their future practice. Students are encouraged to use their self-assessment responses to assist with final reflection.

## Organization of Course by Class Session

DATE	FOCUS
20-Jan	Introduction to Planning Course; student self-assessment
27-Jan	<u>Transparency</u> and its connection to educational planning; Introduction to Strategic Planning
4-Feb	Allison & Kaye, <u>Strategic Planning for Nonprofit Organizations</u> , CH 1- Overview of strategic planning – apply to Chapel Hill-Carrboro City School District Strategic Plan
11-Feb	Allison & Kaye, <u>Strategic Planning for Nonprofit Organizations</u> , CH 2 – “Get Ready” ; compare planning models; select small group project
18-Feb	Brassard, <u>Memory Jogger Plus</u> ; in-class practice of tools <u>Critique of existing plan due</u>
25-Feb	<b>Guest Speaker</b> ; small group work time for phase topic and corresponding quality tools
4-Mar	Allison & Kaye, <u>Strategic Planning for Nonprofit Organizations</u> , CH 3 – Mission, Vision, Values <u>Small group leads discussion</u> and models tools from supplemental resources
11-Mar	Allison & Kaye, <u>Strategic Planning for Nonprofit Organizations</u> , CH 4 – Assess Your Situation / Qualitative Data. <u>Small group leads discussion</u> and models quality tools from other resources
18-Mar	NO CLASS – UW-Madison Spring Break
25-Mar	NO CLASS - Work on Individual Project
1-Apr	Allison & Kaye, <u>Strategic Planning for Nonprofit Organizations</u> , CH 4 – Assess Your Situation / Quantitative Data. <u>Small group leads discussion</u> and models quality tools from other resources
8-Apr	Allison & Kaye, <u>Strategic Planning for Nonprofit Organizations</u> , CH 5 - Writing the Plan – Reaching Consensus. <u>Small group leads discussion</u> and models tools from supplemental resources
15-Apr	Allison & Kaye, <u>Strategic Planning for Nonprofit Organizations</u> , CH 6 – Implementing the Plan – Operational Planning <u>Small group leads discussion</u> and models tools from supplemental resources
22-Apr	Allison & Kaye, <u>Strategic Planning for Nonprofit Organizations</u> , CH 7 – Evaluating the Process/Plan <b>Guest Speaker</b> and additional quality tools from supplemental resources
29-Apr	<b>Guest Speaker</b> ; Planners Workshop – peer feedback on draft products
6-May	<u>Planning Project: Written Plan Due and Oral Presentation Delivered to Class</u>
13-May	NO CLASS – <u>Planning Project: Reflection Due</u>