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3104 – Strategic Planning in Higher Education

The University of Pittsburgh occupies land that was once the home to the Adena culture, the Hopewell culture, and the Monongahela peoples, among others. We honor the legacies of these cultures and the many Indigenous people who call this land home - past, present, future.

Term:	Fall 2023
Schedule:	5400 Posvar Saturdays 9/9, 10/7, 11/4, 12/2 1-5 PM Asynchronous activities/assignments during each module
Meeting with me:	I welcome you to be in contact with us outside of class, to set an appointment for an individual or group meeting, please use the below mechanism:
Linda DeAngelo:	Book at meeting at: http://www.meetme.so/LindaDeAngelo

Course Description

This higher education EdD course examines inclusive leadership and planning processes used by leaders to direct strategic educationally just change and improvement. Strategic planning is essential to the growth, improvement, and survival of all colleges and universities. At its best, effective leadership creates an active, dynamic, and inclusive planning process that not only identifies the future desired for the institution but develops plans and strategies to achieve that desired future.

Course Learning Outcomes

In this module-based course we will have lecture, discussion, activities, module assignments related to the reading material, and major assignments, all of which are designed to enhance knowledge and understanding. There will be areas in the course where you have more prior knowledge to draw upon than others, and more prior experience than the instructors. Prior experience and knowledge is something to be shared in this course. You are invited to ask intentional, thoughtful, and critical questions to scaffold knowledge they may not have that others seem to have as they engage with the course and its materials. This is a doctoral-level course and as such original work that shows broad understanding of the field, an advanced grounding in the literature or other evidence to support one's thesis and claims is expected. Doctoral-level work is clearly, and compellingly presented, with a well-organized logical flow of ideas and information, and proper attribution of sources. Doctoral-level work should meet or exceed assignment guidelines and show critical engagement with course concepts, readings,

activities, and assignments. Doctoral-level writing follows conventions for correct spelling, grammar, punctuation, usage, and sentence and paragraph construction without excessive use of jargon. Writing must follow APA 7th Edition Guidelines. You should expect to do independent work beyond the materials offered in the course to acquire the foundational and background knowledge you need to get the most out of the course and its application to their place of practice and future career.

The learning outcomes we will work together for you to achieve include:

1. Understanding the rationales for strategic planning and how to engage in and carry out a strategic planning process.
2. Deepening an understanding of a leadership practice that fosters equity, inclusion, and justice (and engaging in that practice as the course unfolds)
3. Understanding (and practicing) how to analyze the trade-offs in policy and strategy development, including engagement with potential inequitable, unintended consequences.
4. Building the ability to develop a strategic plan (i.e. a diversity plan related to your practice).

Assignments

Class Participation	15%
Module and Reflection Assignments	25%
Strategic Projects	50%
Larger HE Area/PoP Problem Abstract	10% <i>(Credit toward your course grade is given to your work on advancing toward your milestones for the EdD that will occur at the end of the Spring and then Summer semesters)</i>

Assignment Descriptions

Class Participation in Hybrid Work

You will want to actively participate in this course to ensure that each one of us is successful. Each of us brings a wealth of knowledge which will enrich the learning environment. In addition to being present for each class meeting, it is important that all of us come prepared, having read all the reading that have been assigned in the course sequence prior to the class session date, and having completed the module assignments and other activities. Participation is not all about quantity, quality is also important. Quality engagement in our class sessions fosters the growth, understanding, and learning of everyone in the course and allows us to connect concepts to one another and deepen our knowledge.

Module and Reflection Assignments

Across this course there are five module assignments and two reflection assignments. The purpose of these assignments is to allow you to engage deeply in the readings and to connect them to your lived experience and your administrative practice. The module assignments are group assignments, and the reflection assignments are individual assignments. Only the instructor will have access to the reflections written as part of this course. The prompt for the two

reflection assignments will be available on Canvas at the start of the module in which the reflection is assigned. There are two types of module assignments – collective journals and double-entry journals. Regardless of type you will work in your assigned learning community to complete these assignments. Learning communities must set up their own process for completing this work and must rotate who writes the synthesis and analysis and submits final learning community journal.

The Collective Journal Entries all follow the same format below. The prompt for each collective journal entry will be available on Canvas at the start of the module in which it is assigned.

Collective Journal Entries: There are four steps to these collective journal assignments:

- **Write Journal:** Everyone will complete a journal entry and submit to their learning community by the end of module. (1-page single spaced, 1-inch margin, 12-point font, Times New Roman).
- **Synthesis and Analysis:** One person (assign a rotation) from each learning community will synthesize and analyze the themes from the journal entries. (1-page single spaced, 1-inch margin, 12-point font, Times New Roman).
- **Reflection and Analysis:** Everyone from the learning community will read the synthesis and clarify, reflect, and/or post additional questions they have on the content. (Half page or less single spaced, 1-inch margin, 12-point font, Times New Roman).
- **Submit:** The synthesizer will be responsible for submitting the synthesis and final reflections and analysis as well as the initial journal entries in one document, via Canvas by the end of the second week of the assignment.

The Double-Entry all follow the same format below.

Double-Entry Journals:

- **Write Journal:** Everyone will complete a double-entry journal and submit to their learning community by the end of the module. Double-entry journal must be typed using a two-column format. (a sample double entry journal will be provided on Canvas by the beginning of the module the first time this type of journal is assigned. Be sure to accurately cite (author, text, chapter, page number) on the left-hand side of the journal. **On the left-hand side of the journal,** you will record direct quotes, summaries of ideas, or outlines. Your decision about what to record is up to you as a learner. Whatever you record, it should reflect what you think is central to message of the piece. Include the necessary reference information. **On the personal side of your journal** think about writing to yourself, to your instructors and to your peers. Experiment with a variety of responses. Relate the information on the left-hand side to your experiences; put the ideas into your own words, draw conclusions; make connections to other readings; create visuals; ask questions. This side of the journal must be substantive and must demonstrate critical thinking. (1-page single spaced, 1-inch margin, 12-point font, Times New Roman).
- **Synthesis and Analysis:** One person (assign a rotation) from each learning community will synthesize and analyze the themes within the double-entry journals. (1-page single spaced, 1-inch margin, 12-point font, Times New Roman).
- **Reflection and Analysis:** Everyone from the learning community will read the synthesis

and clarify, reflect, and/or post additional questions they have on the content. (Half page or less single spaced, 1-inch margin, 12-point font, Times New Roman).

- **Submit:** The synthesizer will be responsible for submitting the synthesis and final reflections and analysis as well as the initial journal entries in one document, via Canvas by the end of the second week of the assignment.

Please Note that these are scholarly assignments and as such the texts that are assigned for the module need to be cited as appropriate using APA 7th Edition. You may bring in additional materials not assigned in this class as appropriate in completing this assignment.

Strategic Projects

The purpose of the strategic projects is for you to engage in deep work related to strategic planning. The documents you create as part of these projects are authentic work products and artifacts that you might use in your place of practice. Both projects are the type of work that those engaged in strategic leadership and planning may be tasked to do.

For Project #1 you will work with a partner of your choice. Your partner must be identified, and this information communicated to the instructors via email by 11:59 PM on September 17th. For this project you will create a narrated PowerPoint presentation to mimic a presentation you would give in person. Prompt: Your unit/program/department/college or university does not have a strategic plan and leadership (or the board in the case of a college or university) is not convinced that you need a strategic plan. Prepare a detailed PowerPoint proposing the development of a strategic plan. Your proposal should use the principles outlined in the Morrill text as well as the guide provided in the assigned SCUP reading and must engage equity-based work. Your understanding of the materials you use must be evident. Your presentation must not exceed 25 minutes.

For Project #2 you will use the principles outlined in the Morrill and McNair et al., text, the guide provided in the assigned SCUP reading, and the opinion piece assigned from Inside Higher Education Creating and Publicizing a Diversity Plan to develop a diversity plan for your unit/program/department/college or university. This written document will have three sections and must not exceed 20 pages.

- In section one you will examine the issue at hand/environmental scan (the reason you need the plan). What is the current state and how is that state known? What are the gaps? Opportunities? How do you tell the story of those gaps (consider McNair et al., chapter 3)? How do institutional mission and values align with the plan, if they do?
- In section two (drawing from the Inside HE article and McNair et al., chapter 4 and Morrill and SCUP) develop the plan and the metrics that will be used to demonstrate progress. (you might want to consider working with colleagues in your place of practice in a bit of a strategic planning process to co-develop these goals).
- In section 3 discuss implementation of the plan (drawing from McNair et al. chapter 5 as well Morrill and SCUP) and issues that will need to be addressed. Finally, you may choose either to develop a tool to demonstrate progress in the metrics you are going to assess or you may provide an analysis of the resources needed to fund and support the goals of the plan.

Larger HE Area PoP Problem Abstract

When you work on your dissertation in practice you will begin with a description of your problem area. You have already been introduced to the concept of problem area versus problem of practice. The purpose of this abstract is to provide you with the opportunity to do some preliminary research to understand the problem area within the field of higher education where your developing problem of practice is situated. You receive credit in the course for this abstract, but the purpose of this abstract is to assist you as you begin to work toward getting ready to complete your first EdD milestone in the Spring term (the Problem of Practice milestone paper). As such, the abstract is turned into your advisor who will review it with you and provide you with feedback, as well as continue working with you as your work develops. You will receive credit for submitting the abstract to your advisor. Your abstract may not exceed two pages. In your abstract, address:

- Description of your Problem Area as it is understood in the field of higher education
- Description of your developing Problem of Practice and how your PoP fits within the problem area you have identified

Please note: Each class member will submit an abstract to their advisor via email by 10/22. To receive credit for this assignment, copy me on the email so that I know the abstract has been submitted. The abstract may not exceed two pages. I encourage you to share your abstracts with members of your learning community or other classmates prior to submission to get feedback and be able to revise prior to submitting the final abstract.

Assessment and Evaluation

Letter grades will be assigned in this class. Written work is graded on demonstrated insight, completion of expectations of the assignment, coherence of organization, and grammar and spelling. Letter grades are feedback and have the following meaning:

An “A” signifies work that clearly exceeds expectations. Written work falling into the category will demonstrate clarity of purpose, organization, and communication. It will also demonstrate original interpretation of course material. “A” level participation need not mean a large quantity of participation but denotes the student who prepares for class and consistently indicates having thought critically about the material.

A “B” signifies work that meets expectations, meaning that all aspects of the assignment are completed, but it lacks some of the aspects of “A” work, particularly inconsistent preparation for class or written work that demonstrates less significant insight into the material or frequent grammatical errors.

Letter grades using + and – are also assigned. In some rare cases, it is possible for a student to earn a C grade in this course. Students that are not able to achieve at the C grade level will fail the course.

Basic Writing Guidelines for Course Assignments

All written work must use Times New Roman 12" font and have 1" (normal) margins throughout. Written work must conform to APA citation style guidelines. All assignments/papers will be turned in through Canvas and must be uploaded as Microsoft Word documents by the deadlines that are provided for each assignment. Assignments are due by 11:59 PM on the due dates provided in the module schedule provided below.

Statement of Instructor Position in Course

I strive for my classrooms to be places of intellectual inquiry where discussion and critical reflection are normative and where you are empowered as leaders in the learning process. I have high expectations for student achievement and have a strong belief in the potential of all of you to succeed. This belief in potential to succeed for each of you centers all of my interactions with you both inside and outside of the classroom. I am committed to anti-racist, non-sexist, non-classist, and non-heterosexist pedagogy. This includes fostering an environment that is as safe and inclusive as possible for everyone. If everyone in the class is similarly committed, it will make our work together more productive and stimulating.

Readings / Resources

Required Texts:

Brown, J. (2022). *How to be an inclusive leader: Your role in creating cultures of belonging where everyone can thrive, 2nd edition*. Oakland, CA: Berrett-Koehler.

McNair, T. B., Bensimon, E. M., & Malcolm-Piqueux, L. (2020). *From equity talk to equity walk: Expanding practitioner knowledge for racial justice in higher education*. San Francisco, CA: Jossey-Bass.

Morrill, R. L. (2007). *Strategic leadership: Integrating strategy and leadership in college and universities*. Lanham, MD: Rowman & Littlefield.

Other Required Reading:

Kezar, A., & Posselt, J. (2020). *Higher education administration for social justice and equity: Critical perspectives for leadership*. New York, NY: Routledge. Various chapters from this text are assigned during the course. The text is available electronically through the Pitt Library.

Other readings will either be made available via a weblink or placed on Canvas as part of the module where assigned.

See class schedule listings below.

Modules and Schedule:

Module Name & Dates	Module Readings	Module & Other Assignments Due Dates
#1 Setting the Stage for Equitable and Just Strategic Leadership 8/28 - 9/10	Morrill Chapter 1 McNair et al Chapter 1 Brown Introduction Kezar & Posselt Chapter 1	Module 1 Collective Journal Entry: Individual Journal Entry Due 9/10 Final Synthesis and Individual Journal Entries Due 9/17 CLASS ON 9/9
#2 The Possibilities—Intended and Unintended—of Leadership and Strategic Decision Making for Equity and Justice 9/11 – 9/24	Morrill Chapters 2 & 3 McNair et al. Chapter 2 Kezar & Posselt Chapters 3 & 14	Module 2 Collective Journal Entry: Individual Journal Entry Due 9/24 Final Synthesis and Individual Journal Entries Due 10/1 Strategic Project #1 Partner Assignments Due 9/17
<p>For in-class activity on 10/7, read and be prepared to discuss the following (by group):</p> <p>Group A: Ortagus, J. C., Kelchen, R., Rosinger, K., & Voorhees, N. (2020). Performance-Based Funding in American Higher Education: A Systematic Synthesis of the Intended and Unintended Consequences. <i>Educational Evaluation and Policy Analysis</i>, 42(4), 520–550.</p> <p>Group B: Lester, J. (2014). The Completion Agenda: The Unintended Consequences for Equity in Community Colleges. In M. B. Paulsen (Ed.), <i>Higher Education: Handbook of Theory and Research: Volume 29</i> (pp. 423–466). Springer Netherlands</p>		
# 3 Leading an Equitable and Just Strategic Planning Process 9/25 – 10/8	Morrill Chapters 4 & 5 McNair et al. Chapter 3 Kezar & Posselt Chapter 2 SCUP Book on Strategic Planning (Available on Canvas) Webinar from Sloan Foundation on recent SCOTUS Decision – you are welcome to watch the entire webinar please engage with Jamie Lewis Keith’s presentation from 6:48 to 34:58 of the webinar	Module 3: Double-Entry Journal: Individual Journal Entry Due 10/8 Final Synthesis and Individual Journal Entries Due 10/15 CLASS ON 10/7

Module Name & Dates	Module Readings	Module & Other Assignments Due Dates
#4 Building Toward Inclusive Leadership Practice I 10/9 – 10/15	Brown Chapters 1 & 2	Reflection #1 on Inclusive Leadership Due 10/15
#5 Building Narratives through Mission and Vision for Equity and Justice Practice 10/16 – 10/29	Morrill Chapters 6, 7, 8 McNair et al. Chapter 4 Kezar & Posselt Chapters 9 & 16 Read Creating and Publicizing a Diversity Plan link: https://www.insidehighered.com/advice/2019/11/20/how-effectively-develop-update-and-share-diversity-plan-opinion	Module 5: Double-Entry Journal: Individual Journal Entry Due 10/29 Final Synthesis and Individual Journal Entries Due 11/5 Abstract Due 10/22 Larger HE/PoP Problem
#6 Initiating and Creating Change for Equity and Justice Practice 10/30 - 11/12	Morrill Chapters 9, 10, & 11 McNair et al. Chapter 5 Kezar & Posselt Chapters 4, 13, & 14	Module 6 Collective Journal Entry: Individual Journal Entry Due 11/12 Final Synthesis and Individual Journal Entries Due 11/19 Strategic Project #1 Due 11/5 CLASS ON 11/4
#7 Building Toward Inclusive Leadership Practice II 11/13 – 11/19	Brown Chapters 3, 4 & 5	Reflection #2 on Inclusive Leadership Due 11/19
Thanksgiving Week – 11/20 – 11/26		
#8 Engaging in the Challenge of Strategic Leadership for Equity and Justice 11/27 – 12/3	Morrill Chapters 12 & 13 Brown Chapter 6	Strategic Project #2 Due 12/10 CLASS ON 12/2

Statements on University and School of Education Policy:

Departmental Grievance Procedures. The purpose of grievance procedures is to ensure the rights and responsibilities of faculty and students in their relationships with each other. When a student in higher education believes that a faculty member has not met his or her obligations (as an instructor or in another capacity) as described in the Academic Integrity Guidelines, the student should follow the procedure described in the Guidelines by (1) first trying to resolve the matter with the faculty member directly; (2) then, if needed, attempting to resolve the matter through conversations with the chair/associate chair of the department; (3) if needed, next talking to the assistant dean of the school; and (4) if needed, filing a written statement of charges with the school-level academic integrity officer. [Andrea Zito is the Integrity Officer.]

Academic Integrity: Students in this course will be expected to comply with the [University of Pittsburgh's Policy on Academic Integrity](#). Any student suspected of violating this obligation for any reason during the semester will be required to participate in the procedural process, initiated at the instructor level, as outlined in the University Guidelines on Academic Integrity. This may include, but is not limited to, the confiscation of the examination of any individual suspected of violating University Policy. In this course, failure to comply with academic integrity policies will result in a zero on assignments where the policy was violated and may result additionally in a failure for the course grade. Furthermore, no student may bring any unauthorized materials to an exam, including dictionaries and programmable calculators. To learn more about Academic Integrity, visit the [Academic Integrity Guide](#) for an overview of the topic. For hands-on practice, complete the [Understanding and Avoiding Plagiarism tutorial](#).

Disability Services: If you have a disability for which you are or may be requesting an accommodation, you are encouraged to contact both your instructor and [Disability Resources and Services](#) (DRS), 140 William Pitt Union, (412) 648-7890, drsrecep@pitt.edu, (412) 228-5347 for P3 ASL users, as early as possible in the term. DRS will verify your disability and determine reasonable accommodations for this course.

Accessibility: The Canvas LMS platform was built using the most modern HTML and CSS technologies, and is committed to W3C's Web Accessibility Initiative and [Section 508](#) guidelines. Specific details regarding individual [feature compliance](#) are documented and updated regularly.

Diversity and Inclusion: The University of Pittsburgh does not tolerate any form of discrimination, harassment, or retaliation based on disability, race, color, religion, national origin, ancestry, genetic information, marital status, familial status, sex, age, sexual orientation, veteran status or gender identity or other factors as stated in the University's Title IX policy. The University is committed to taking prompt action to end a hostile environment that interferes with the University's mission. For more information about policies, procedures, and practices, see: <https://www.diversity.pitt.edu/civil-rights-title-ix-compliance/policies-procedures-and-practices>. I ask that everyone in the class strive to help ensure that other members of this class can learn in a supportive and respectful environment. If there are instances of the aforementioned issues, please contact the Title IX Coordinator, by calling 412-648-7860, or e-mailing titleixcoordinator@pitt.edu. Reports can also be filed

online: <https://www.diversity.pitt.edu/civil-rights-title-ix-compliance/make-report/report-form>.

You may also choose to report this to a faculty/staff member; they are required to communicate this to the University's Office of Diversity and Inclusion. If you wish to maintain complete confidentiality, you may also contact the University Counseling Center (412-648-7930).

Copyright Notice: These materials may be protected by copyright. United States copyright law, 17 USC section 101, et seq., in addition to University policy and procedures, prohibit unauthorized duplication or retransmission of course materials. See [Library of Congress Copyright Office](#) and the [University Copyright Policy](#).

Statement on Classroom Recordings: To ensure the free and open discussion of ideas, students may not record classroom lectures, discussion and/or activities without the advance written permission of the instructor, and any such recording properly approved in advance can be used solely for the student's own private use.

Email Communication: Each student is issued a University e-mail address (username@pitt.edu) upon admittance. This e-mail address may be used by the University for official communication with students. Students are expected to read e-mail sent to this account on a regular basis. Failure to read and react to University communications in a timely manner does not absolve the student from knowing and complying with the content of the communications. The University provides an e-mail forwarding service that allows students to read their e-mail via other service providers (e.g., Hotmail, AOL, Yahoo). Students that choose to forward their e-mail from their pitt.edu address to another address do so at their own risk. If e-mail is lost as a result of forwarding, it does not absolve the student from responding to official communications sent to their University e-mail address.

Gender Inclusive Language Statement: Language is gender-inclusive and non-sexist when we use words that affirm and respect how people describe, express, and experience their gender. Just as sexist language excludes women's experiences, non-gender-inclusive language excludes the experiences of individuals whose identities may not fit the gender binary, and/or who may not identify with the sex they were assigned at birth. Identities including trans, intersex, and genderqueer reflect personal descriptions, expressions, and experiences. Gender-inclusive/non-sexist language acknowledges people of any gender (for example, first year student versus freshman, chair versus chairman, humankind versus mankind, etc.). It also affirms non-binary gender identifications and recognizes the difference between biological sex and gender expression. Students, faculty, and staff may share their preferred pronouns and names, and these gender identities and gender expressions should be honored.

Statement on Scholarly Discourse: In this course we may discuss very complex issues of which all of us have strong feelings and, in most cases, unfounded attitudes. It is essential that we approach this endeavor with our minds open to evidence that may conflict with our presuppositions. Moreover, it is vital that we treat each other's opinions and comments with courtesy even when they diverge and conflict with our own. We must avoid personal attacks and the use of ad hominem arguments to invalidate each other's positions. Instead, we must develop a culture of civil argumentation, wherein all positions have the right to be defended and argued against in intellectually reasoned ways. It is this standard that everyone must accept in order to

stay in this class; a standard that applies to all inquiry in the university, but whose observance is especially important in a course whose subject matter could at times be emotionally charged.

Take Care of Yourself! Do your best to maintain a healthy lifestyle this semester by eating well, exercising, avoiding drugs and alcohol, getting enough sleep, and taking time to relax. Despite what you might hear, using your time to take care of yourself will help you achieve your academic goals more than spending too much time studying. All of us benefit from support and guidance during times of struggle. There are many helpful resources available at Pitt. An important part of the college experience is learning how to ask for help. Take the time to learn about all that is available and take advantage of it. Ask for support sooner rather than later – this always helps. If you or anyone you know experiences any academic stress, difficult life events, or difficult feelings like anxiety or depression, we strongly encourage you to seek support. Consider reaching out to a friend, faculty, or family member you trust for assistance connecting to the support that can help.

The University Counseling Center is here for you: call 412-648-7930 and visit their website.

If you or someone you know is feeling suicidal, call someone immediately, day or night:
University Counseling Center (UCC): 412-648-7930
University Counseling Center Mental Health Crisis Response: 412-648-7930 x1
Resolve Crisis Network: 888-796-8226 (888-7-YOU-CAN)

If the situation is life threatening, call the Police: On-campus: Pitt Police: 412-268-2121
Off-campus: 911