The University of Oklahoma  
College of Continuing Education  
Advanced Programs – Course Syllabus  

Course Title:  
Planning Issues in Organizations  

Course Number:  
HR 5113-110  

Course Description:  
This course covers critical issues related to planning in for-profit and non-profit organizations. Specifically, the students will be introduced to the complexities of the planning process and strategies to make planning work more effectively and efficiently in a variety of organizational settings (from colleges and universities and military to service and volunteer organizations and business corporations).  

Class Dates, Location and Hours:  
Dates: December 2-4 & 9-11, 2011  
Location: 3281 Sheridan Road, Fort Sill, Oklahoma.  
Hours: Fri 5:30-9:00 p.m., Sat 9:00 a.m.-5:00 p.m.; Sun 12:00-4:00 p.m.  
Last day to enroll or drop without penalty: November 3, 2011  

Site Director:  
Tamara Sutteer. Assistant: Anita Bailey. Phone: 580-355-1974; Fax: 580-351-9674; E-mail: apftsill@ou.edu  

Professor Contact Information:  
Course Professor: David L. Tan, Ph.D.  
Mailing Address: Dept. of Educational Leadership and Policy Studies  
Collings Hall, Room 227  
820 Van Vleet Oval  
University of Oklahoma  
Norman, OK 73019  
Telephone Number: (405) 325-5986  
Fax Number: (405) 325-2403  
E-mail Address: dtan@ou.edu  
Website Address: http://www.ou.edu/education/edahdtan  
Professor availability: The professor will be available via e-mail to students before and after the class sessions. On-site office hours are half an hour before and after each class session, by appointment.  

Textbook(s) and Instructional Materials:  
Student materials are available at the Follett/AP Bookstore located in the Oklahoma Memorial Union, 900 Asp Ave., Norman, OK. Orders can be placed online at www.oklahomaunion.bkstr.com or by telephone at 866-369-9713 (toll free in the U.S.) or 405-325-5960 (outside the U.S.). E-mail orders may be sent to oklahomaunion@bkstr.com. Representatives are available from 8 a.m. to 6 p.m. CST Monday through Thursday and 8 a.m. to 5 p.m. CST on Friday. Summer hours: 8 a.m. to 4 p.m. CST. Faxed orders may be placed 24 hours a day to 866-223-5607 (toll free in the U.S.) or 405-325-1557 (outside the U.S.)


Note: The Follett/AP Bookstore is the Advanced Programs contractual textbook provider. Should text changes become necessary after publication of the course syllabus, Advanced Programs will facilitate text returns/refunds only for texts purchased through the Follett/AP Bookstore.

**Course Objectives:**
Generally, this course is aimed at providing the students with an understanding of the planning process. The students will learn the usefulness and complexities of the planning process, vis-à-vis outcomes that are likely to occur as a result of planning, practical and workable approaches to planning, ways to alleviate the fear factor associated with planning, ways to foster constituent involvement and commitment to planning, the impact of organizational structures and externalities on planning, issues of leadership and followership in planning, and ways to enhance the effectiveness and efficiency of planning. While there are no prerequisites to this course, the students are assumed to have some basic understanding of organizational theory and concepts of leadership.

**Tentative Course Outline:**

**Session 1:** Introduction, logistics of course; overview of planning concepts and issues; philosophy of planning (collaborative exercise)
**Due: Personal understanding of planning**

**Session 2:** Definitions of planning; benefits of planning (collaborative exercise); significance of change and innovation in organizations

**Session 3:** Good approaches to planning (collaborative exercise); potential stumbling blocks to planning; issues in planning: the time factor and steps; chaos theory

**Session 4:** Issues in planning: assessment of readiness to plan and environmental scanning (collaborative exercise); differences between for-profits and non-profits and business applications in planning

**Session 5:** Organizational theories; leadership theories; implications for planning

**Session 6:** Theory of organizational development and change; planning issues wrap-up; planning simulation (collaborative exercise)
**Due: Three mini-reports**

**Assignments, Grading and Due Dates:**
Consistent with the tradition of a graduate seminar, the course has been designed to be highly-interactive, providing the students with plenty of opportunities for active student learning and participation, which is considered critical to the success of the course. The course will consist of open class discussions, collaborative learning exercises, team and individual presentations, lectures, PowerPoint presentations, video tape presentation, and a simulation role-playing exercise dealing with planning.

1. Consistent with pre-class expectations, read the required textbook prior to the first class session.

2. Based on the readings from the textbook and/or your personal knowledge and experience with planning, write a three to four paged report explaining your personal understanding of planning (e.g., what it ought to be, ways to induce people to plan, and good approaches) in any organizational setting. These essays will form the bases for initial discussion about planning. Due: This assignment must be turned in to the professor at the first class session.
3. Search in the literature base for three separate scholarly pieces of work involving concepts of planning. These materials may be from refereed and non-refereed journals, books, monographs, magazines, or well-circulated newspapers, planning documents, and even the internet.

4. Using the results of the literature search, you are required to write a three to four paged mini-report on all three scholarly pieces, totaling about 9-12 pages. In each mini-report, give a brief discussion of the points raised (no more than one paragraph) and then analyze the points using the concepts of planning covered in class or in the textbook. You may, for example, explain why these points make or do not make sense to you, the logic or completeness of their arguments, and the potential implications of these concepts for other organizational settings. This exercise is calling for your analysis of the points rather than a journalist reporting of the article. **Due: This assignment will be due at the last class session. This exercise, in essence, serves as your final exam.**

5. In order to enhance your understanding of planning issues on a self-directed basis, you have three options for the required term paper for the course. You may be required to seek additional scholarly resources beyond the required textbook to complete this assignment.

   (a) You may write a paper based on an eye-ball account (real-life account) of some aspects of planning in any organization setting (e.g., business, military, state or federal educational agency, and college or university). You should use concepts of planning covered or discussed in the textbook and in class and include additional scholarly resources to support your arguments or analyses. You should address the following points in your paper:

   - How is the organization organized? Who were the key players in the planning process? What did the planning process consist of?
   - Who decided on the planning activities? What was the rationale behind these decisions? Were these activities carried out? How successfully were they carried out?
   - What were the leadership styles, managerial processes, or decision-making mechanisms implemented in the planning process? What helped or hindered the planning process?
   - What were the strengths and weaknesses of the planning process? What aspects of the planning process were missing, could have been improved, or done differently?
   - What are some important lessons other organizations can learn from this particular planning process?

   (b) You may write a conventional term paper on a planning issue. You should have at a minimum six bibliographic references in your paper, not including the textbook. In this option, you should address the following points:

   - What is the planning issue you are addressing?
   - How did this issue come about? What is the historical or evolutionary background of this issue?
   - Why is this issue important or significant for organizations?
   - What are all the relevant perspectives on the issue?
   - What are the possible resolutions of this issue?
   - What are the implications of this issue for organizations?
In this option, you will be presented with a major case study dealing with planning issues in a well-known organization, to which you are required to develop plans for addressing all the issues posed in the case. Specifically, you will be required to identify the organization’s significant problems, develop a plan and rationale for resolving these problems (which should include a list of alternatives, ways to motivate individuals to get involved, and ways to mobilize the planning process), and resolutions of complications that are likely to result. The details of the case study, including information about how to write your responses, will be posted on the course website. You will be required to use concepts of planning discussed in the textbook and in class and any other relevant scholarly materials to complete this assignment.

In either case, your term paper should be between seven and ten double-spaced pages. Please send in your paper as an e-mail attachment (MS Word document), not as an email message. My e-mail address is dtan@ou.edu. This paper will be due two weeks from the last day of class.

Assessment: The criteria for the student’s final course grade are as follows: 10% is based on your scholarly writing in Item 2, 30% on Item 4, and 40% on Item 5; and the remaining 20% is based on the quality of your active participation in class. At the end of class, there will be an opportunity for you to offer intra- and inter-team evaluations relative to other students’ performances in collaborative activities. The quality of your class participation is determined by these three factors: (1) your active participation in open class discussions; (2) your participation in collaborative work based on intra- and inter-team evaluations; and (3) the quality of your class presentations. The penalty for late papers will be a 5-10% reduction to your overall course grade.

Grading: This is a letter-graded course: A, B, C, D, or F.

NOTICE: Failure to meet assignment due dates could result in a grade of I (Incomplete) and may adversely impact Tuition Assistance and/or Financial Aid.
Policies and Notices

Attendance/Grade Policy

Attendance and participation in interaction, individual assignments, group exercises, simulations, role playing, etc. are valuable aspects of any course because much of the learning comes from discussions in class with other students. It is expected that you attend all classes and be on time except for excused emergencies.

Excused absences are given for professor mandated activities or legally required activities such as emergencies or military assignments. Unavoidable personal emergencies, including (but not limited to) serious illness; delays in getting to class because of accidents, etc.; deaths and funerals, and hazardous road conditions will be excused.

If you are obtaining financial assistance (TA, STAP, FA, VA, Scholarship, etc.) to pay all or part of your tuition cost, you must follow your funding agency/institution’s policy regarding “I” (Incomplete) grades unless the timeline is longer than what the University policy allows then you must adhere to the University policy.

Students who receive Financial Aid must resolve/complete any “I” (Incomplete) grades by the end of the term or he/she may be placed on “financial aid probation.” If the “I” grade is not resolved/completed by the end of the following term, the student’s Financial Aid may be suspended make the student ineligible for further Financial Aid.

Students are responsible for meeting the guidelines of Tuition Assistance and Veterans Assistance. See the education counselor at your local education center for a complete description of your TA or VA requirements.

Academic Honesty

Honesty is a fundamental precept in all academic activities and … [you] have a special obligation to observe the highest standards of honesty. Academic misconduct in any form is inimical to the purposes and functions of the University and is therefore unacceptable and is rigorously proscribed. Academic misconduct includes:

- cheating (using unauthorized materials, information, or study aids in any academic exercise), plagiarism, falsification of records, unauthorized possession of examinations, intimidation, and any and all other actions that may improperly affect the evaluation of a student’s academic performance or achievement; assisting others in any such act; or attempting to engage in such acts.

All acts of academic misconduct will be reported and adjudicated as prescribed by the student code of the University of Oklahoma. All students should review the “Student’s Guide to Academic Integrity” found at http://www.ou.edu/provost/integrity

Accommodation Statement

The College of Continuing Education [Advanced Programs] is committed to making its activities as accessible as possible. For accommodations on the basis of disability, please contact your OU Site Director.

Course Policies

Advanced Programs policy is to order books in paperback if available. Courses, dates, and professors are subject to change. Please check with your OU Site Director. Students should retain a copy of any assignments that are mailed to the professor for the course.

Copyright

Any and all course materials, syllabus, lessons, lectures, etc. are the property of professor teaching the course and the Board of Regents of the University of Oklahoma and are protected under applicable copyright.

For more information about Advanced Programs, visit our website at: http://www.goou.ou.edu/
INSTRUCTOR VITA

David L. Tan, Ph.D.

Education

1985 Ph.D. in Higher Education Administration, University of Arizona

Current Positions

- Advanced Programs Professor since 1993
- Professor and Chair, Department of Educational Leadership & Policy Studies, University of Oklahoma
- Graduate Liaison, University of Oklahoma

Frequently Taught Advanced Programs Courses

- EDAH 5043  Introduction to Research in Adult and Higher Education
- EDAH 5143  Leadership Development in Adult and Higher Education
- EDAH 5940  Assessment in Adult and Higher Education
- HR 5033  Seminar in Leadership in Organizations
- HR 5043  Seminar in Organizational Change and Development
- HR 5053  Racial Diversity
- HR 5113  Planning Issues in Organizations
- HR 5113  Cultural Diversity in Human Relations
- HR 5113  Cultural Diversity and Justice in Organization
- EIPT 6033  Research in Education

Major Areas of Teaching and Research Interest

- Teaching: Institutional research; planning; assessment; finance; research on the college student; leadership; diversity; organizational development; prospectus development; and research methods and statistics.
- Research: Issues related to college students (access and choice, persistence, multiculturalism, cognitive and affective outcomes, STEM majors, student transition to college, intercollegiate athletics), strategic planning in higher education, diversity training in the corporate setting, and quality assessment of colleges and universities.

Representative Publications and Presentations


**Representative Honors and Awards Received**

- Teacher of Year Award, 2008.
- Asian-American Student Life and Asian-American Student Association Award, 2007
- Outstanding Service to the *Journal of College Student Development*, 2003
- Alpha Phi Omega National Service Award, 2000
- Outstanding Contribution Award in Accreditation, 1990
- Presidential Research Recognition Award, 1989
- Presidential Research Excellence Award, 1987
- Vice Presidential Award for Outstanding Service, 1986

**Major Professional Affiliations**

- PEAQ Evaluator-Consultant, North Central Association of Colleges and Schools
- AQIP Peer Reviewer, North Central Association of Colleges and Schools
- Executive Director, Center for Student Affairs Research (CSAR)
- Editorial Board, *College Student Affairs Journal*
- Member and Former Vice Chair, Executive Committee, Southwest Center for Human Relations Studies
- Association for Institutional Research (AIR)
- Oklahoma Association for Institutional Research and Planning (OKAIRP)
- National Consortium for Student Retention Data Exchange (CSRDE)
- Former Editorial Board Member (1997-2003), *Journal of College Student Development*
- Reviewer, Law School Admissions Test (LSAT), American College Testing
- OU Faculty Senate
- American Association for Higher Education (AAHE)