Strategic Planning for Social Impact
ESM 230, Spring 2024

Class: MW 12:30-1:45 pm (BH 1414)

Instructor: Emily Cotter
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Office Hours: By Appointment (See Booking Calendar)
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Course Description

ESM 230 is an introductory course on developing a strategy for a nonprofit, government or philanthropic organization. Topics include the strategy development process, strategic frameworks, strategic research, board development, nonprofit financial health and sustainability, and nonprofit funding. Working on team projects, students will choose an existing public benefit-oriented organization as a case study, then conduct research to develop recommendations for that organization's strategic direction. Through a weekly speaker series, students will learn through "live case studies" presented by leaders from nonprofit, government, and philanthropic organizations. Each week, one speaker will visit the classroom and talk about their organization, discuss the role they play in developing and executing strategy, and provide real-world examples.

Course Software

Box – File Sharing Service
Canvas – Learning Management System
Google Drive – File Storage and Synchronization Service
Slack – Messaging Application – Students should register for an account with Slack and join the **esm230s24** workspace. See Canvas for the invitation link.
Zoom – Online Conference System

Required Reading

Harvard Cases
Cases are listed in the schedule below. See course entitled "Strategic Planning for Social Impact" (ESM 230, Spring 2024)" on Harvard Business Publishing site at:

https://hbsp.harvard.edu/import/1162372

All the cases are listed under the Harvard course entitled "Strategic Planning for Social Impact" (ESM 230, Spring 2024)." Each Harvard Case costs $4.50-4.95. The total cost for the coursepack is $14.40 (paid directly to Harvard Business Publishing).

All other required reading will be made available via download on Canvas.

Guest Speakers

We will have weekly guest speakers visiting the classroom who are leaders from nonprofit, government, and philanthropic organizations. The guest speaker series is one of the most valuable aspects of this course and should not be missed. To prepare for guest speakers, be sure to visit the websites of their organizations. Students are encouraged to download and review each nonprofit organization's latest Form 990, which should be available online through GuideStar.org.

Students will be evaluated on their interaction with the guest speakers through the participation portion of the class grade.

Attendance and Participation

Students are expected to attend every class. Attendance and participation represent 20% of your grade (200 points). Participation is evaluated in a number of ways. Obviously, participation is correlated with attendance. It is impossible to earn participation points if a student is not in class. Students remain responsible for submitting work due even if absent. Students should e-mail the instructor prior to any missed class. Students remain responsible for the material covered and assignments given during an absence and are to discern this information from their peers.

Attendance at all class sessions is critical to the learning process and the participation component of the course. Innovation and entrepreneurship require collaboration and interaction. Innovators and entrepreneurs find opportunities, adapt, and improve themselves by listening and learning from others. Please come to class prepared to participate in the day's activities.

	Individual Contribution	Team Contribution
Participation • Attendance • In-Class Discussions • Q&A Participation with Guest Speakers	200 points (20%)	
Strategic Research Project:		
Team Formation Post		50 points (5%)
Progress Update Presentation		150 points (15%)
Strategic Research Board Presentation		300 points (30%)
"Board Member" Participation	100 points (10%)	
Reflection Paper	200 points (20%)	
	500 points (50%)	**500 points (50%)**

TOTAL   **1,000 points (100%)**

Assignments and Grading

All assignments must be turned in on time. Assignments will be submitted in soft copy format on Canvas or Slack, unless otherwise instructed. All assignments submitted on Canvas should use the following file format:

<u>Team Assignment</u>
(Assignment Name)_(Team Name)
Example: Progress Update Presentation_Green Gauchos

<u>Individual Assignment</u>
(Assignment Name)_(Last Name)
Example: Reflection Paper_Cotter

The deadline is at the beginning of class (i.e., 12:30 pm) on the due date listed for each assignment, unless otherwise noted. If class is not held on the date an assignment is due, the deadline is still at 12:30 pm, unless otherwise noted. Assignments submitted after the deadline but within 24 hours will lose 5% of the total points; after that, an additional 5% for each day that the assignment is late.

Description of Course Assignments

<u>Strategic Research Project – Team Formation Post</u>
By the Team Formation Deadline, teams will create a "Team Formation Post" in Slack. The post should provide the team's working name, a list of team members, the name of the team's selected case study organization, a link to the organization's website, a brief description of that organization, and a short summary of any observations of current environmental and/or social challenges that might drive the strategic research for this project. This Post should include a timeline and methodology for the team's strategic research. Over the course of the six-week research project, each team should conduct primary research by interviewing at least 15 academic/industry experts and/or potential stakeholders.

The Team Formation Post must be submitted in **#project-teams** within the **esm230s24** workspace on Slack by 12:30 PM on 4/15/24. For detailed instructions, see "Team Formation Post Guidelines" in **#project-teams**. This Team Formation Post will account for 5% of your grade (max. 50 points). These points will be the same for each team member.

<u>Strategic Research Project – Progress Update Presentation</u>
Each team will prepare a PowerPoint presentation that provides an update on their progress (5 slides recommended). This presentation should include the status of primary research (1-2 slides), analysis of data and research (2-3 slides), and next steps/research plans (1 slide). Be sure to cite any data or evidence gathered through primary or secondary research that supports your strategic direction.

A soft copy of the presentation must be uploaded onto Canvas by 12:00 PM on the day of the team's Progress Update Presentation (either 5/6/24 or 5/8/24).

<u>Strategic Research Project – Board Presentation</u>
This is the main deliverable for the project and will demonstrate the team's ability to gather and synthesize research and derive meaningful insights to inform the strategic direction for the team's chosen organization. In this presentation, the team will develop strategic recommendations as if they were presenting to the organization's Board of Directors. The project will be conducted ideally in teams of three to five students. A separate document regarding the details of this project will be posted on Canvas. The Strategic Research Project Board Presentation will account for 20% of your grade (max. 200 points). These points will be the same for each team member.

A soft copy of the presentation must be uploaded onto Canvas by 12:00 PM on the day of the team's Strategic Research Board Presentation (either 6/3/24, 6/5/24 or 6/10/24, if need be).

In addition, 10% of your grade (max. 100 points) will depend on your individual participation as a "Board Member," during the Q&A session of another team's presentation.

Speaker Series: Reflection Paper
According to one of the fathers of management/organization theory, Henry Mintzberg, the primary purpose of the university is to encourage reflection on what you have learned and how that learning might apply to your life and career. In this spirit, one of the assignments in this course is a reflection paper, to be completed at the end of the course. In writing the paper, think back to the guest speakers and discuss what you learned from each speaker and/or about each type of organization (nonprofit, government, or philanthropic). Highlight the guest speakers and the specific insights that impressed or influenced you most. You are encouraged to include quotes from the speakers or references to specific ideas presented by the speakers. However, this paper should not be just a summary of your notes from each guest speaker's visit.

In this paper, you should also provide self-reflection on questions such as: How have these speakers influenced your personal or career goals? How has your thinking, attitude, or motivation changed? What has surprised you? What have been the most important takeaways for you? Feel free to address any other self-reflective questions as well.

As a rough guideline, the paper should be roughly 3 pages, single-spaced. Papers will be graded as: "Exceptional; clearly above average; includes deep reflection" – 200 points; "Thoughtfully completed; average" – 170 points; "Not thoughtfully completed" – 140 points.

A soft copy must be uploaded onto Canvas by 5:00 PM on 6/12/24.