

SOCSCI 20P3 – Operational Planning

Course information:

- Wednesdays 7:00 to 10:00pm from September 9 to December 9 2020
- Location: Online
- Every week on Wed at 7:00pm, until Dec 9, 2020, 14 occurrence(s), Zoom detail on last pages of this document.
- Instructor: Duncan Gillespie
- Office: N/A
- Office hours: N/A
- Email: duncan.gillespie@live.ca
- Email: gilled@mcmaster.ca
- Phone: (905) 730 9628

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Course Overview

Course Description:

Participants in this course will learn how to implement and manage an annual operating plan for not-for-profit organizations. Students will learn how to set priorities, develop a clear direction for action, assign responsibilities, set out costs and indicate how revenue will be generated to fund annual programs, use the plan as a resource for board, staff and volunteers and to track and evaluate progress.

Course Objectives:

Developing transferable skills.

You will work on developing academic skills that are transferable to your other university courses as well as to the workforce. These skills include:

- 1) critical reading and thinking;
- 2) communication (oral, written and visual);
- 3) self and peer evaluation;

Required Texts:

There is no textbook for this class

Course Requirements/Assignments

Requirements Overview and Deadlines

Assessment Activity	% of Grade	Date
In Class Test	30%	October 7, 2020
In Class Test	30%	November 18, 2020
Final Exam	40%	December 16, 2020

Assignment Submission and Grading

Submitting Assignments & Grading

- All written assignments are to be typed and double-spaced. Please include a title page with your name, student number and email address, the topic title of the assignment and the date submitted.
- Assignments are due at the beginning of class on the Due Date and may be handed in as a hard copy or emailed to: duncan.gillespie@live.ca or gilled@mcmaster.ca
- Individual assignments submitted electronically must include your last name in the filename: e.g. Smith_Assignment_5_Article_Assessments.rtf.

Late Submissions

- All work is due on the date stated, at the beginning of class, unless other arrangements have been made in advance with the instructor. A late penalty of 5 percentage points per day will apply after the due date (weekends included).

Class Participation and Engagement

- Class participation and engagement is an important component of this course (and of active learning). Therefore, we expect all students to be 'active' participants in this course. This means attending all classes, being actively involved in class activities and thoughtful discussion, and completing all assignments.

Group Assignments

- For all group assignments, ALL students in the group must be contributing members of that assignment. The expectation is that each student will be an active and respectful member of their group, and contribute to the assignment - in a fair and equitable way. Group work is sometimes challenging, but it can also be rewarding in a number of ways, including providing you with opportunities to develop valuable 'working-as-a-team' skills that will serve you well in this and other courses, as well as more broadly in your academic, professional, and personal life.

Avenue to Learn

In this course we will be using Avenue to Learn. Students should be aware that, when they access the electronic components of this course, private information such as first and last names, user names for the McMaster e-mail accounts, and program affiliation may become apparent to all other students in the same course. The available information is dependent on the technology used. Continuation in this course will be deemed consent to this disclosure. If

you have any questions or concerns about such disclosure please discuss with the course instructor.

Online Proctoring

Some courses may use online proctoring software for tests and exams. This software may require students to turn on their video camera, present identification, monitor and record their computer activities, and/or lock/restrict their browser or other applications/software during tests or exams. This software may be required to be installed before the test/exam begins

Privacy Protection

In accordance with regulations set out by the Freedom of Information and Privacy Protection Act, the University will not allow return of graded materials by placing them in boxes in departmental offices or classrooms so that students may retrieve their papers themselves; tests and assignments must be returned directly to the student. Similarly, grades for assignments for courses may only be posted using the last 5 digits of the student number as the identifying data. The following possibilities exist for return of graded materials:

- 1) Direct return of materials to students in class;
- 2) Return of materials to students during office hours;
- 3) Students attach a stamped, self-addressed envelope with assignments for return by mail;
- 4) Submit/grade/return papers electronically.

Arrangements for the return of assignments from the options above will be finalized during the first class.

Extreme Circumstances

The University reserves the right to change the dates and deadlines for any or all courses in extreme circumstances (e.g., severe weather, labour disruptions, etc.). Changes will be communicated through regular McMaster communication channels, such as McMaster Daily News, A2L and/or McMaster email.

Student Responsibilities

- Students are expected to contribute to the creation of a respectful and constructive learning environment. Students should read material in preparation for class, attend class on time and remain for the full duration of the class.

Conduct Expectations

As a McMaster student, you have the right to experience, and the responsibility to demonstrate, respectful and dignified interactions within all of our living, learning and working communities. These expectations are described in the [Code of Student Rights & Responsibilities](#) (the "Code"). All students share the responsibility of maintaining a positive environment for the academic and personal growth of all McMaster community members, **whether in person or online.**

It is essential that students be mindful of their interactions online, as the Code remains in effect in virtual learning environments. The Code applies to any interactions that adversely affect, disrupt, or interfere with reasonable participation in University activities. Student disruptions or behaviours that interfere with university functions on online platforms (e.g. use of Avenue 2

Learn, WebEx or Zoom for delivery), will be taken very seriously and will be investigated. Outcomes may include restriction or removal of the involved students' access to these platforms.

Academic Integrity

You are expected to exhibit honesty and use ethical behaviour in all aspects of the learning process. Academic credentials you earn are rooted in principles of honesty and academic integrity. **It is your responsibility to understand what constitutes academic dishonesty.** Academic dishonesty is to knowingly act or fail to act in a way that results or could result in unearned academic credit or advantage. This behaviour can result in serious consequences, e.g. the grade of zero on an assignment, loss of credit with a notation on the transcript (notation reads: "Grade of F assigned for academic dishonesty"), and/or suspension or expulsion from the university. It is your responsibility to understand what constitutes academic dishonesty. For information on the various types of academic dishonesty please refer to the [Academic Integrity Policy](#).

The following illustrates only three forms of academic dishonesty:

- Plagiarism, e.g. the submission of work that is not one's own or for which other credit has been obtained.
- Improper collaboration in group work.
- Copying or using unauthorized aids in tests and examinations.

Academic Accommodation of Students with Disabilities

Students with disabilities who require academic accommodation must contact [Student Accessibility Services](#) (SAS) to make arrangements with a Program Coordinator. Student Accessibility Services can be contacted by phone 905-525-9140 ext. 28652 or e-mail sas@mcmaster.ca for further information, consult McMaster University's [Academic Accommodation of Students with Disabilities](#) policy.

Academic Accommodation for Religious, Indigenous and Spiritual Observances (RISO)

Students requiring academic accommodation based on religious, indigenous or spiritual observances should follow the procedures set out in the [RISO](#) policy. Students requiring a RISO accommodation should submit their request to their Faculty Office **normally within 10 working days** of the beginning of term in which they anticipate a need for accommodation or to the Registrar's Office prior to their examinations. Students should also contact their instructors as soon as possible to make alternative arrangements for classes, assignments, and tests.

Please review the [RISO information for students in the Faculty of Social Sciences](#) about how to request accommodation.

E-mail Communication Policy

Effective September 1, 2010, it is the policy of the Faculty of Social Sciences that all e-mail communication sent from students to instructors (including TAs), and from students to staff, must originate from the student's own McMaster University e-mail account. This policy protects confidentiality and confirms the identity of the student. It is the student's responsibility to ensure that communication is sent to the university from a McMaster account. If an instructor becomes aware that a communication has come from an alternate address, they may not reply.

McMaster Student Absence Form (MSAF)

In the event of an absence for medical or other reasons, students should review and follow the Academic Regulation in the Undergraduate Calendar “Requests for Relief for Missed Academic Term Work”. If you have any questions about the MSAF, please contact your Associate Dean’s office.

Copyright and Recording

Students are advised that lectures, demonstrations, performances, and any other course material provided by an instructor include copyright protected works. The Copyright Act and copyright law protect every original literary, dramatic, musical and artistic work, **including lectures** by University instructors

The recording of lectures, tutorials, or other methods of instruction may occur during a course. Recording may be done by either the instructor for the purpose of authorized distribution, or by a student for the purpose of personal study. Students should be aware that their voice and/or image may be recorded by others during the class. Please speak with the instructor if this is a concern for you.

Course Weekly Topics and Readings

The instructor and university reserve the right to modify elements of the course during the term. The university may change the dates and deadlines for any or all courses in extreme circumstances. If either type of modification becomes necessary, reasonable notice and communication with the students will be given with explanation and the opportunity to comment on changes. It is the responsibility of the student to check his/her McMaster email.

Week/Date	Topic	Grading
Class 1 Sept 9	Introduction to SOC SCI 20P3 <ul style="list-style-type: none">• Introduction to the course and to Operational Planning.	
Class 2 Sept 16	Overview of Operational Planning <ul style="list-style-type: none">• Preparing to plan.• Developing Goals and Objectives from the Mission, Vision and Values.• Understand the importance of Operational Planning.	
Class 3 Sept 23	The Process <ul style="list-style-type: none">• Differentiate between Planning Models.• Understand and begin the Planning Process.• Clarify the role of Competition in the Not For Profit Sector.• Understand Market Analysis.	
Class 4 Sept 30	The Process <ul style="list-style-type: none">• Learn and apply the concept of Sustainable Competitive Advantage.• Understand Critical Success Factors.	
Class 5 Oct 7	In Class Test	(30%)

Week/Date	Topic	Grading
Oct 14	No Class – Mid Term Break	
Class 6 Oct 21	Financial Overview <ul style="list-style-type: none"> • Know the basic concepts of Financial Management. 	
Class 7 Oct 28	Financial Management <ul style="list-style-type: none"> • Understand the Process of Budgeting. 	
Class 8 Nov. 4	Execution of the Plan <ul style="list-style-type: none"> • Know the steps to Successful Implementation. 	
Class 9 Nov 11	Managing Change <ul style="list-style-type: none"> • Understand the process of change management. • Identify the contributors to successful change. 	
Class 10 Nov 18	In Class Test	(30%)
Class 11 Nov 25	After Planning <ul style="list-style-type: none"> • Identify when and how to update the Plan. • Learn the steps to reviewing the Plan. 	
Class 12 Dec 2	Follow Through <ul style="list-style-type: none"> • Translate the results of information to date to understand how to achieve successful planning from process to execution. 	
Class 13 Dec 9	Next Steps <ul style="list-style-type: none"> • 10 Signs of Trouble in Operational Planning. 10 Questions to ask throughout the Process.	
Dec 16	Final Exam	(40%)

Additional Resources

Authenticity/Plagiarism Detection

In this course we may use a web-based service (Turnitin.com) to reveal authenticity and ownership of student submitted work. Students will be expected to submit their work electronically either directly to Turnitin.com or via Avenue to Learn (A2L) plagiarism detection (a service supported by Turnitin.com) so it can be checked for academic dishonesty. Students who do not wish to submit their work through A2L and/or Turnitin.com must still submit an electronic and/or hardcopy to the instructor. No penalty will be assigned to a student who does not submit work to Turnitin.com or A2L. All submitted work is subject to normal verification that standards of academic integrity have been upheld (e.g., on-line search, other software, etc.). To see the Turnitin.com Policy, please go to the [academic integrity website](#).

Zoom Meeting Details

gilled@mcmaster.ca is inviting you to a scheduled Zoom meeting.

Topic: SS 2 OP 3 FALL 2020

Time: Sep 9, 2020 07:00 PM Eastern Time (US and Canada)

Every week on Wed, until Dec 9, 2020, 14 occurrence(s)

- Sep 9, 2020 07:00 PM
- Sep 16, 2020 07:00 PM
- Sep 23, 2020 07:00 PM
- Sep 30, 2020 07:00 PM
- Oct 7, 2020 07:00 PM
- Oct 14, 2020 07:00 PM
- Oct 21, 2020 07:00 PM
- Oct 28, 2020 07:00 PM
- Nov 4, 2020 07:00 PM
- Nov 11, 2020 07:00 PM
- Nov 18, 2020 07:00 PM
- Nov 25, 2020 07:00 PM
- Dec 2, 2020 07:00 PM
- Dec 9, 2020 07:00 PM

Please download and import the following iCalendar (.ics) files to your calendar system:

https://mcmaster.zoom.us/meeting/tJ0tc-gopzwsGtHUhA42M48XDwbA5hsVh8R7/ics?icsToken=98tyKuChrj8pGt2SthmCRox5Ao-gb_TxmGZdjbd1qTfkV3J-NlvOEvVAE-d3A-7Y

Join Zoom Meeting:

<https://mcmaster.zoom.us/j/99043097605?pwd=OUpOUU1FNU1sa2R0d2dJeHhQTFZnQT09>

Meeting ID: 990 4309 7605

Passcode: 314649

Dial by your location

- +1 778 907 2071 Canada
- +1 438 809 7799 Canada
- +1 587 328 1099 Canada
- +1 613 209 3054 Canada
- +1 647 374 4685 Canada
- +1 647 558 0588 Canada
- +1 646 876 9923 US (New York)
- +1 651 372 8299 US (St. Paul)
- +1 669 219 2599 US (San Jose)
- +1 669 900 6833 US (San Jose)
- +1 720 928 9299 US (Denver)
- +1 786 635 1003 US (Miami)
- +1 971 247 1195 US (Portland)
- +1 213 338 8477 US (Los Angeles)
- +1 253 215 8782 US (Tacoma)

- +1 267 831 0333 US (Philadelphia)
- +1 301 715 8592 US (Germantown)
- +1 312 626 6799 US (Chicago)
- +1 346 248 7799 US (Houston)
- +1 408 638 0968 US (San Jose)
- +1 470 250 9358 US (Atlanta)
- +1 470 381 2552 US (Atlanta)
- +1 602 753 0140 US (Phoenix)
- +1 646 518 9805 US (New York)

Find your local number: <https://mcmaster.zoom.us/j/99043097605>

Join by SIP: 99043097605@zoomcrc.com

Join by H.323:

- 162.255.37.11 (US West)
- 162.255.36.11 (US East)
- 221.122.88.195 (China)
- 115.114.131.7 (India Mumbai)
- 115.114.115.7 (India Hyderabad)
- 213.19.144.110 (EMEA)
- 103.122.166.55 (Australia)
- 209.9.211.110 (Hong Kong SAR)
- 64.211.144.160 (Brazil)
- 69.174.57.160 (Canada)
- 207.226.132.110 (Japan)