COURSE OUTLINE

SOC SCI 2OP3

2018 WINTER Semester

Operational Planning

Day of the Week: Mondays– 7:00 to 10:00 PM

Location: Building T13 Room 105

McMaster University   **Instructor: Duncan Gillespie**
Faculty of Social Sciences   **Office: KTH 208**

                                                              Email: duncan.gillespie@live.ca
                                                              Phone: 905 730 9628

                                                              Office Hours: Mondays – 6:00-7:00
                                                              (by appointment)

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:

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

Evaluation Components:

Assessment Activity	% of Grade	Date Due
Mid Term Exam	**30**	February 26, 2018
Assignment	**30**	March 19, 2018
FINAL EXAM	**40**	TBD

Written Assignments: 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. Written submissions may be hand delivered in class on the due date or before or delivered via email to duncan.gillespie@live.ca or through the Dropbox in Avenue 2Learn.

Submitting Assignments Electronically: 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.

Policy for Returning Assignments/Posting Grades: In accordance with regulations set out by the Freedom of Information and Privacy Protection Act, the University will not allow the return of graded materials by placing them in boxes in departmental offices or classrooms so that students may retrieve their papers themselves; all tests and assignments must be returned directly to the student.

And since it is important for student learning and skills development that students receive feedback on their assignments as they progress through the course, you can expect to receive feedback (comments and a grade) on each of your assignments in a timely fashion. This will allow you the opportunity to see how you performed on each assignment and time to discuss any questions you might have with your instructor.

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. submit/grade/return papers electronically.

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

Grades for assignments may only be posted using the last 5 digits of the student number as the identifying data. Final grades for the course will be posted on MUGSI.

UNIVERSITY POLICY ON ACADEMIC DISHONESTY:

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. 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, located at http://www.mcmaster.ca/academicintegrity

The following illustrates only three forms of academic dishonesty:
1. Plagiarism, e.g. the submission of work that is not one's own or for which other credit has been obtained.
2. Improper collaboration in group work.
3. Copying or using unauthorized aids in tests and examinations.

A NOTE ABOUT THE USE OF AVENUE TO LEARN IN THIS COURSE:

In this course we will be using Avenue to Learn for the online components of the course. 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 this with the course instructor.

A NOTE ABOUT THE USE OF TURNITIN.COM IN THIS COURSE

In this course we may be using a web-based service (Turnitin.com) to reveal plagiarism. If announced by the Instructor, students will be expected to submit their work electronically to Turnitin.com as well as in hard copy so that it can be checked for plagiarism. Students who do not wish to submit their work to Turnitin.com must still submit a hard copy of their work to the instructor. No penalty will be assigned to a student who does not submit work to Turnitin.com. All submitted work is subject to normal verification that standards of academic integrity have been upheld (e.g., on-line search, etc.). To see the Turnitin.com policy, please go to www.mcmaster.ca/academicintegrity

FACULTY OF SOCIAL SCIENCES 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 to 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, the instructor may not reply at his or her discretion.

McMaster Student Absence Form (MSAF):

This on-line self-reporting tool is for undergrad students to report one absence of up to 3days per term. The MSAF gives you the ability to request relief for any missed academic work during that one absence (that is less than 25% of the course grade). Please note: this tool cannot be used during any final examination period.

You may submit only 1 MSAF per term. This form should be filled out as soon as possible before you return to class after your absence. It is YOUR responsibility to follow up with your instructor immediately (within 48 hours of submitting the MSAF) in person or by email regarding the nature of the relief that is possible for the missed work.

If you are absent more than 3 days or exceed 1 request per term, are absent for a reason other than medical, or have missed work worth 25% or more of your final grade, you MUST visit the

office of the Associate Dean in your Faculty. You may be required to provide supporting documentation to the Faculty office. You must NOT submit any medical or other relevant documentation to your instructor. Your instructor may NOT ask you for such documentation. All documentation requests will only come from the Faculty office.

Access Copyright Regulations:

McMaster University holds a licensing agreement with Access Copyright, the Canadian Copyright Licensing Agency. Information on current regulations for copying for education purposes can be found at the following website: http://www.copyright.mcmaster.ca/

Student Accessibility Services (SAS) *formerly Centre for Student Development (CSD):*

If you have an accommodation letter from SAS, you are required to provide a copy of that letter to your instructor. Please be sure that you arrange academic accommodations through SAS as early as possible in order that the instructor can receive the accommodation letter as early as possible in the term.

What are my responsibilities as a student registered at SAS? Students are responsible to identify themselves to Student Accessibility Services on an annual and regular basis in order to receive accommodations and services. Students are responsible for:

- meeting their SAS Program Coordinator prior to, or at the start of each academic term (September, January and summer sessions);
- providing their SAS Program Coordinator with relevant and professional medical or psychological documentation;
- notifying their SAS Program Coordinator if courses are dropped or added, or if accommodations require a change;
- meeting with individual course instructors to discuss specific needs in relation to the course and their disability; and
- providing the course instructor with their accommodation letter from SAS.

For more information, see the SAS website: http://csd.mcmaster.ca/sswd/faqs.html

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.

COURSE SCHEDULE

Date	Topic	Grading

Jan 8	**Introduction to SOC SCI 2OP3** • Introduction to the course and to Operational Planning.	
Jan 15	**Overview of Operational Planning** • Preparing to plan. • Developing Goals and Objectives from the Mission, Vision and Values. • Understand the importance of Operational Planning.	
Jan 22	**The Process** • Differentiate between Planning Models. • Understand and begin the Planning Process. • Clarify the role of Competition in the Not For Profit Sector. • Understand Market Analysis.	
Jan 29	**The Process** • Learn and apply the concept of Sustainable Competitive Advantage. • Understand Critical Success Factors.	
Feb 5	**Financial Overview** • Know the basic concepts of Financial Management.	
Feb 12	**No Class** **Financial Management** • Understand the Process of Budgeting.	
Feb 19	No class – reading week	

Feb 26		**Mid Term Exam** **In Class** **(30%)**
Mar 5	**Execution of the Plan** • Know the steps to Successful Implementation.	
Mar 12	**Managing Change** • Understand the process of change management. • Identify the contributors to successful change. •	
Mar 19	**After Planning** • Identify when and how to update the Plan. • Learn the steps to reviewing the Plan.	**Assignment Due** **(30%)**
Mar 26	**Follow Through** • Translate the results of information to date to understand how to achieve successful planning from process to execution.	
Apr 2	**Next Steps** • 10 Signs of Trouble in Operational Planning. • 10 Questions to ask throughout the Process.	
Apr 9	**Class Review**	