McMaster University

Operational Planning
SOCSCI 2OP3

- January 10th, 2021 – April 12th, 2021, Winter, 2021, Online
- Tuesdays 7:00 pm to 10 pm
- Instructor: Dr. A. Kyprianou (Dr. K. is fine)
- Office: Online
- Office hours: By appointment only
- Email: kypriana@mcmaster.ca

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Course Information

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 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;
4) research skills; and
5) group work skills.

Course Format

This course will take place Live over Zoom until the university deems it safe to return to classes. Please check your email and Announcements for this class regularly for information.

Required Texts:
1) **There is no textbook for this course; however, readings and scenarios will be provided to you via the McMaster University Library pertaining to course content.**

Course Requirements/Assignments

Requirements Overview and Deadlines

Assessment Activity	% of Grade	Date Due
In-class Mid-term Test	30%	February 14th, 2022
In-class Work (Assignments/Quizzes)	30%	Various
Final Exam	40%	TBD (set by Registrar)

⇒ The **Final Exam** will cover the entire term's coursework.

Requirement/Assignment Details
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 uploaded to A2L (preferred).
- Individual assignments submitted electronically must include your last name in the filename: e.g. Smith_Assignment_5_Article_Assessments.doc.
- Only submit digital files using Microsoft software.

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 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. Additionally, I expect you to have your cameras on during our online classes.

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, usernames 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 them with the course instructor.

- This exam will be 40-50 multiple choice questions based on a case study and 2 hours.
- The Final Exam will contribute to 40% of the total course grade.
- <u>This exam will be set by the registrar</u>.

Assignment Submission and Grading

Form and Style
- Written assignments must be typed and double-spaced and submitted with a front-page containing the title, student's name, student number, and date. Number all pages (except the title page).

Submitting Assignments & Grading
- All submissions for this course are to be submitted online through the Avenue2Learn portal.
- A Grading Rubric will be provided for the discussions and the individual assignment.

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Privacy Protection
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; 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 the return of graded materials:

1) Submit/grade/return papers electronically.

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.

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, 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.

Authenticity/Plagiarism Detection:

Some courses may use a web-based service (Turnitin.com) to reveal authenticity and ownership of student submitted work. For courses using such software, students will be expected to submit their work electronically either directly to Turnitin.com or via an online learning platform (e.g. A2L, etc.) using plagiarism detection (a service supported by Turnitin.com) so it can be checked for academic dishonesty. Students who do not wish their work to be submitted through the plagiarism detection software must inform the Instructor before the assignment is due. No penalty will be assigned to a student who does not submit work to the plagiarism detection software. **All submitted work is subject to normal verification that standards of academic integrity have been upheld** (e.g., on-line search, other software, etc.). For more details about McMaster's use of Turnitin.com please go to
www.mcmaster.ca/academicintegrity

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.

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.

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.

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 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.

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.

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.

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".

Course Weekly Topics and Readings

This lecture schedule is based upon current university and public health guidelines and may be subject to changes during the term. Any changes to the schedule or course delivery will be communicated on the course announcements section on Avenue to Learn. Please check the announcements prior to attending class.

Week 1: January 10th

Topics:
Introduction to SOC SCI 2OP3
- Introduction to the course and to Operational Planning.

Week 2: January 17th

Topics:
Overview of Operational Planning
- Preparing to plan.
- Developing Goals and Objectives from the Mission, Vision and Values.
- Understand the importance of Operational Planning.

Week 3: January 24th

Topics:
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.

Week 4: January 31st

Topics:
Financial Overview
- Know the basic concepts of Financial Management.

Week 5: February 7th

Topics:
Financial Management
- Understand the Process of Budgeting.

<div align="center">**Week 6**: February 14th</div>

<u>Topics:</u>

- **In-Class Test (30%)**

<div align="center">**Week 8: Feb 28th**</div>

<u>Topics:</u>
Execution of the Plan

- Know the steps to Successful Implementation.

<div align="center">**Week 9: March 7th**</div>

<u>Topics:</u>
Managing Change

- Understand the process of change management.
- Identify the contributors to successful change.

<div align="center">**Week 10: March 14th**</div>

<u>Topics:</u>
After Planning

- Identify when and how to update the Plan.
- Learn the steps to review the Plan.

<div align="center">**Week 11: March 21st**</div>

<u>Topics:</u>
In-Class Test (30%)

<div align="center">**Week 12: March 28th**</div>

<u>Topics:</u>
Follow Through

- Translate the results of information to date to understand how to achieve successful planning from process to execution.

<div align="center">**Week 13: April 4th**</div>

<u>Topics:</u>

- Final Exam Review

<div align="center">**Week 14: Final Exam Week – Thursday, April 15th to Friday, April 29th**</div>

<u>Topics:</u>

- **Final Exam to be set by Registrar (TBA)**