HI ED 810: Planning and Resource Management
An On-line Course Offered by Penn State’s Graduate Certificate in Institutional Research
Fall 2011

INSTRUCTORS

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COURSE OVERVIEW

This course is essentially composed of three parts. The first part (units 1-3) introduces students to the history of strategic planning, the external environment facing higher education institutions, and key economic theories that can aid budgeting and planning efforts. The second part of the course (units 4-8) provides an introduction to key budgeting structures and processes and contains a project that allows students to gain experience adjusting budgets for administrative and academic units. The final portion (units 9-14) provides students with a working knowledge of strategic planning models and contains a project where students develop a process for strategic planning and enact that process using simulated data.

COURSE REQUIREMENTS

For each unit of this class, you will need to do the following:

• Watch an Adobe Presenter presentation that introduces the readings for the unit.
• Read the assigned readings for that unit.
• Watch an Adobe Presenter presentation that discusses the assigned readings and related topics not covered in the readings. [In certain units, we may have multiple shorter presentations.]
• Complete the assignment for that unit.
• Review the feedback on your assignment provided by classmates and the instructors.
Each unit is assigned to a week that spans Monday through Sunday. The unit materials will be activated on ANGEL by the previous Friday before that week, and the assignments will be due on the following Monday at noon. For example, unit 1 spans September 12th-18th. The materials will be made available by Friday, September 9th and the assignment will be due by noon on Monday, September 19th.

PRESENTATIONS

In units 8 and 14, students will be presenting their projects through Elluminate. In upcoming weeks, we will provide information on the steps students will need to follow in order to present through Elluminate.

GRADING SYSTEM

You will be graded based on your performance on the assignments for each unit. The assignments (and their contribution to your grade) are detailed below.

1. Individual Assignments (30% of grade)
   - Unit 1: Strategic planning response (6%)
   - Unit 2: Analysis of your institution’s external environment (6%)
   - Unit 3: Application of economic principles to budgeting/planning scenarios (6%)
   - Unit 4: Planning and budgeting cheat sheet (6%)
   - Unit 9: Institution-level strategic planning exercise (6%)

2. Budgeting Project (25% of grade)
   - The assignments for units 5-7 will comprise this project.

3. Budgeting Project Presentation (10% of grade)
   - In unit 8, you will present your project and provide feedback on the presentations provided by other students.

4. Strategic Planning Project (25% of grade)
   - The assignments for units 10-13 will comprise this project.

5. Strategic Planning Project Presentation (10% of grade)
   - In unit 14, you will present your project and provide feedback on the presentations provided by other students.

COURSE MATERIALS

Three texts (listed below) are required for the class. In some units, additional readings are required, and you can download PDFs of these readings from the course ANGEL page (https://cms.psu.edu/). The course ANGEL page also houses other course materials (videos, assignments, etc.).


**OTHER COURSE POLICIES**

If you find that an unexpected circumstance prevents you from completing an assignment on time, please alert the instructors *as soon as possible*. Otherwise, late work will be penalized. We recognize that many of the students in this class are working professionals whose workloads vary across weeks, and we are willing to consider reasonable requests for individual adjustments to the course schedule.

All College of Education policies ([http://www.ed.psu.edu/educ/current-students/academic-integrity/](http://www.ed.psu.edu/educ/current-students/academic-integrity/)) regarding academic integrity apply to this course.

We welcome students with disabilities into the course. If you have a disability-related need for reasonable academic adjustments in this course, please notify us as early in the semester as possible.

**COURSE SCHEDULE**

**Unit 1: Thinking Critically About Planning.**
9/12/11 – 9/18/11


**Unit 2: The External Environment**  
9/19/11 – 9/25/11


Dickeson (2010). Preface

Dickeson (2010). Ch 1: Recognizing the need for reform.


**Unit 3: Key Economic Concepts**  
9/26/11 – 10/2/11


**Unit 4: Budgeting: Introduction**  
10/3/11 – 10/9/11


**Unit 5: Budgeting: Introduction (Part II)**  
10/10/11 – 10/16/11

Goldstein (2005). Ch 4: Allocating resources and increasing flexibility.

Unit 6: Budgeting: Incentives
10/17/11 – 10/23/11


Unit 7: Budgeting: Unit-Level Strategies
10/24/11 – 10/30/11


Unit 8: Presentations: Budget Project
10/31/11 – 11/6/11

Unit 9: Strategic Planning: Identifying Leadership and Mission
11/7/11 – 11/13/11


Unit 10: Strategic Planning: Defining Programs and Criteria
11/14/11 – 11/20/11


Unit 11: Strategic Planning: Measuring, Analyzing, Prioritizing
11/21/11 – 11/27/11


Unit 12: Strategic Planning: Process and Implementation
11/28/11 – 12/4/11


Unit 13: Strategic Planning: Final Thoughts
12/5/11 – 12/11/11


**Unit 14: Presentations: Strategic Planning Projects**  
12/12/11 – 12/18/11