

FALL 2004
EDL 572 -- EDUCATIONAL SYSTEMS AND PLANNING:
COLLEGE AND UNIVERSITY CONTEXT ** 2 CREDITS

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COURSE DESCRIPTION

A study of the planning process including topics such as establishing goals; assessing needs; identifying resources; and generating, analyzing, and selecting alternatives. Processes and techniques in planning will be emphasized.

COURSE OBJECTIVES/IDENTIFIABLE OUTCOMES

- (1) To introduce students to contemporary concepts and problems in institutional planning and systems
- (2) To identify the major categories of resources and to understand their interdependencies as well as relationships to other entities
- (3) To generate a list of identifiable, audience members
- (4) To connect various themes and concepts in planning and systems analyses
- (5) To distinguish the purposes of several instruments used for assessment
- (6) To define strategic planning
- (7) To understand and apply various strategic models
- (8) To differentiate the various classes of strategic models
- (9) To identify the various stakeholders and influential actors in the planning system
- (10) To critique current approaches to planning
- (11) To value the role of institutional research and suggest further development of these offices
- (12) To explain several of the processes, problems, and social phenomena through theories
- (13) To conduct an abridged review of the literature with a brief annotated bibliography on a specific area of institutional or system analysis
- (14) To collect and analyze one unit of institutional data

COURSE EXPECTATIONS AND CLASSROOM ETIQUETTE

- *Attendance and Engagement:* Your contributions to class discussions, and your absorption and reflection during the interactive components of the course add to your overall learning as well as to others in the cohort. Thus, attendance and engagement are mandatory.
- *Preparation:* Your level of preparedness directly impacts the course dynamics; therefore, readings and other assignments should be completed prior to the course meeting. In addition, absent a valid excuse or prearranged agreement, late assignments will not be accepted.
- *Opportunity and Openness:* The classroom should be a safe place to express ideas, opinions, and beliefs. Indeed, academic criticisms and discussions are critical elements of the course; however, behavior that obstructs traditional norms of academic freedom and mutual respect are not acceptable. Similarly, class participation is encouraged; at the same time, consideration of others such as providing others time to speak and learn should be respected. In other words, please provide opportunities for others to join the discussion.
- *Devices and Disruptions:* Please silence cell phones, beepers, and similar gadgets during class meetings. If you are on-call or an emergency signal is given, please quietly step outside of the classroom to address the matter.
- *Food and Physical Environs:* The class meetings are quite long. Although there will be periodic breaks, there may be times when you need to use the restroom, eat a snack in-class, or stretch a bit more. These are understandable needs. I only ask that you move quietly, keep the room clean, and avoid disrupting others. In addition, please feel free to provide me suggestions on how to make the physical environment and experience more comfortable.
- *Academic Integrity:* Adherence to academic norms and ethical standards is expected of graduate students. Emphasizing this point further, I wish to remind everyone to please properly attribute works (see also, Code of Student Life, Rule 3-3; Graduate Academic Catalog section on Academic Standards).

ACCOMMODATIONS FOR STUDENTS WITH DISABILITIES

The University will make reasonable accommodations for persons with documented disabilities. Students are encouraged to contact the Office of Disability Support Services. At the Grand Forks campus, you may reach the staff at 190 McCannel Hall or (701) 777-3425 v/tty. Services are available to students who are registered and submit appropriate documentation. As your instructor, I am happy to discuss specific needs with you as well.

COURSE EVALUATION/GRADING

25%	Class Participation & Preparedness	45%	Project		
30%	Book Presentation				
A	90-100	B	80-89	C	70-79

Class Participation: Class participation includes contributions to class discussions, analysis and synthesis of the readings, application of theories and concepts, and in-class assignments.

Presentation: Two groups will be formed prior to the first day of class. Each group will present one of the assigned books. Presentation length is expected to be **2½-3hours** (excluding two 10-minute breaks). The presentation must include an overview of the text, emphasis on key concepts and practices, engagement of dialogue among your peers (particularly with those who did not read the book), and participatory activity (or activities) to apply principle concepts and reinforce substantive

knowledge learned. A handout with more details will be distributed two weeks before the presentation date. [NOVEMBER 14-15]

Project: A final group project with an individual paper constitutes the largest portion of your grade. A handout describing the final group project and the individual paper will be distributed prior to the first class meeting. This website, <http://www2.acs.ncsu.edu/UPA/>, may serve as a model (or as a benchmark) to the group project deliverable. [DECEMBER 10]

REQUIRED TEXTS & MATERIALS

Rowley, D. J., Lujan, H.D., & Dolence, M. G. (1997). Strategic change in colleges and universities: Planning to survive and prosper. San Francisco, CA: Jossey-Bass, Inc. [for Group A]

Brewer, D. J., Gates, S. M., & Goldman, C. A. (2001). In pursuit of prestige: Strategy and competition in U.S. higher education. New Brunswick, NJ: Transaction Publishers. [for Group B]

Chronicle of Higher Education (access to weekly paper)

Articles, see Reading Assignments below.

OPTIONAL: OTHER RESOURCES

Burke, W. W. (2002). Organization change: Theory and practice. Thousand Oaks, CA: Sage Publications.

Duderstadt, J. J. (2000). A university for the 21st century. Ann Arbor, MI: University of Michigan Press.

Howard, R. D. (Ed.) (2001). Institutional research: Decision support in higher education. Tallahassee, FL: Association for Institutional Research.

Knight, W. (Ed.) (2003). A primer on institutional research. Tallahassee, FL: Association for Institutional Research.

Massy, W. F. (Ed.) (1996). Resource allocation in higher education. Ann Arbor, MI: University of Michigan Press.

Tierney, W. G. (Ed.) (1998). The responsive university: Restructuring for high performance. Baltimore, MD: Johns Hopkins University Press.

Weick, K. E. (2001). Making sense of the organization. Malden, MA: Blackwell Publishing.

PROFESSIONAL ASSOCIATIONS/ORGANIZATIONS

Academic Quality Improvement Program: <http://www.aqip.org>

American Association for Higher Education: <http://www.aahe.org/>

Association of Governing Boards of Universities and Colleges: <http://www.agb.org>

Association of Higher Education Facilities Officers: <http://www.appa.org/>

Association for Institutional Research: <http://airweb.org/>

College and University Professional Association for Human Resources: <http://www.cupahr.org/>

Society for University Planning: <http://www.scup.org/>

State Higher Education Executive Officers <http://www.sheeo.org/default.htm>

COURSE SCHEDULE & ASSIGNMENTS

UNIT 1

Readings:

REQUIRED

Eckel, P., Green, M., Hill, B., Mallon, W. (1999). Taking charge of change: A primer for colleges and universities. Washington, D. C.: American Council on Education.

READINGS: DEPENDENT ON GROUP ASSIGNMENT

Group A

Rowley, D. J., Lujan, H.D., & Dolence, M. G. (1997). Strategic change in colleges and universities: Planning to survive and prosper. San Francisco, CA: Jossey-Bass, Inc.

Group B

Brewer, D. J., Gates, S. M., & Goldman, C. A. (2001). In pursuit of prestige: Strategy and competition in U.S. higher education. New Brunswick, NJ: Transaction Publishers.

OPTIONAL

Rhoades, G. (2000). Who's doing it right?: Strategic activity in public research universities. Review of Higher Education, 24(1), 41-66.

UNIT 2

Readings:

REQUIRED

- 2.R.1 Borden, V. M. H., & Owens, J. L. Z. (2001). Measuring quality: Choosing among surveys and other assessments of college quality. Washington, D. C.: American Council on Education.
- 2.R.2 Terenzini, P. T. (1989). Assessment with open eyes. Journal of Higher Education, 60(6), 644-664.
- 2.R.3 Review websites and services -
(a) College Student Experience Questionnaire (CSEQ):
<http://www.indiana.edu/~cseq/>
(b) Cooperative Institutional Research Program (CIRP):
<http://www.gseis.ucla.edu/heri/cirp.html>
- 2.R.4 Ehrenberg, R. G. (2004). Why universities need institutional researchers more than they realize?
- 2.R.5 Review websites and data -
(a) U.S. Department of Education, National Center for Educational Statistics

<http://www.nces.ed.gov/>,

<http://www.nces.ed.gov/surveys/SurveyGroups.asp?Group=2>

(b) U.S. Department of Labor, Bureau of Labor Statistics <http://www.bls.gov/>

- 2.R.6 Marcus, L. R. (1999). The micropolitics of planning. Review of Higher Education 23(1), 45-64.
- 2.R.7 Chaffee, E. E., & Jacobson, S. W. (1997). Creating and changing institutional cultures. In M. W. Peterson, D. D. Dill, L. A. Mets, & Associates, Planning and management for a changing environment: A handbook on redesigning postsecondary institutions (pp. 230-263). San Francisco, CA: Jossey-Bass Publishers.
- 2.R.8 Mets, L. A. (1997). Planning change through program review. In M. W. Peterson, D. D. Dill, L. A. Mets, & Associates, Planning and management for a changing environment: A handbook on redesigning postsecondary institutions (pp. 340-359). San Francisco, CA: Jossey-Bass Publishers.
- 2.R.9 Jones, D. (1999). Linking strategic planning and budgeting. Boulder, Colorado: National Center for Higher Education Management Systems.
- 2.R.10 Frost, S. H., Hearn, J. C., & Marine, G. M. (1997). State policy and the public research university: A case study of manifest and latent tensions. Journal of Higher Education, 68(4), 363-397.
- 2.R.11 Dirks, Arthur L. (1998). Higher education in marketing theory. Published on-line by author (<http://webhost.bridgew.edu/adirks/ald/papers/mktheor.htm>). Bridgewater, MA.
- 2.R.12 Moore, R. M. (2004, May/June). The rising tide: "Branding" and the academic marketplace. Change, 36(3), 56-61.
- 2.R.13 Cases: Rocky Mountain College, Muskingum College, University of the Ozarks, Bellevue University, University of Hartford
- 2.R.14 Arizona Higher Education Case Study

GROUP A

- 2.A.1 Francis, J. G., & Hampton, M. C. (1999). Resourceful responses: The adaptive research university and the drive to market. Journal of Higher Education, 70(6), 625-641.
- 2.A.2 Birnbaum, R. (2000). The life cycle of academic management fads. Journal of Higher Education, 71(1), 1-16.

GROUP B

- 2.B.1 Barnes, S. V. (1999). A lost opportunity in American education?: The proposal to merge the University of Chicago and Northwestern University. American Journal of Education, 107(4), 289-320.
- 2.B.2 June, A. W. (2004, Aug. 13). The making of a megadorm: Three Chicago colleges have teamed up to build the nation's largest joint residence hall. Chronicle of Higher Education, 50(49), A23.

OPTIONAL

Ortmann, A. (1997). How to survive in postindustrial environments: Adam Smith's advice for today's colleges and universities. Journal of Higher Education, 68(5), 483-501.

Louisiana State University

[http://www.lsu.com/slas/ucollege.nsf/\\$Content/Strategic+Plan/\\$file/StratPlanasof7-30-03.pdf](http://www.lsu.com/slas/ucollege.nsf/$Content/Strategic+Plan/$file/StratPlanasof7-30-03.pdf)

Purdue University

http://www.purdue.edu/oop/strategic_plan/pages/progress_pdf/sec_yr_prog_rep.pdf

North Dakota University System

<http://www.ndus.nodak.edu/Upload/allfile.asp?id=463&tbl=MultiUse>

Minnesota State System

<http://www.mnscu.edu/System/Chancellor/StrategicPlanSept02.pdf>

FINAL PROJECT

December 10th, 4:00 pm

CD of your group's final project and papers.