Trachtenberg School
of Public Policy
& Public Administration
THE GEORGE WASHINGTON UNIVERSITY

PPPA 6085.11: STRATEGY AND CHANGE LEADERSHIP
Spring 2021, 3 credits

Class meetings: Tuesday 3:30 to 6:00 pm generally, with adjustments for asynchronous events
Class location: Remote, using Blackboard and Zoom
Instructors: Brian Gallagher (CEO United Way Worldwide) & Mary Tschirhart (Prof, TSPPPA Director)
Initial Contact Info: marytschirhart@gwu.edu
Appointments: on request, online
Course prerequisites: none

Course Description: Students will engage with tools and approaches for envisioning and leading change efforts in complex organizations and systems. They will consider how to address data needs and availability for change efforts, and the potential role of participatory decision-making. Course will offer ideas on learning and communicating about change through digital mechanisms. Students will wear the hats of CEO, philanthropist, advocate, and strategist in change attempts. The course helps students refine and update their skills and knowledge for leading change with the help of ideas drawn from guest speakers, individual and group projects, comparison of old and new thinking about change leadership, and futurists' predictions.

Student Learning Outcomes: Students will hone ability to:
  (1) Build social capital with multiple stakeholders in a digital world
  (2) Evaluate appropriateness and efficacy of leadership strategies and data-based decisions for incremental, revolutionary and evolutionary change efforts
  (3) Identify critical pivoting opportunities in organizations and systems
  (4) Articulate who they are as a leader and their leadership assumptions, preferences and values
  (5) Consider the role of participatory decision-making in change efforts
  (6) With others, imagine future destinations and pathways
  (7) Become the leader they want to be

Method of Instruction: Course combines experiences in and out of class to meet change leaders and learn with them. Self-reflection exercises guide students' development of their own general leadership philosophy for application to real-world situations. Class discussions are critical for debating value of different tools and approaches for change leadership as well as futurists' ideas. Readings aid preparation for class and clarify assignments but are not the basis for exams. This is not a course that requires memorization or application of pre-established formulas. Rather, it requires critical thinking and ability to explain arguments for and against particular change leadership strategies. It relies on the ability of students to learn from their own and others' experiences and insights. NO purchases for readings are required.

Average Minimum Out-of-Class Time and In-class Time per Week to Enhance Learning: Students should expect to spend, on average, about 5 hours per week outside of class (e.g., doing readings, watching videos, preparing individual assignments, and conducting group assignment), in addition to about 2.5 hours per week on-line during the course time band.

Grading Breakdown: Two Reflection Papers (20%), Design Yourself Report (25%), Strategy Memo (25%), Group Project (30%).

Assignments and Due Dates:

(1) **REFLECT ON TWO GUEST SPEAKER SESSIONS:** Submit a no more than one page, single-spaced (12 pt. font) reflection for each of TWO sessions with a guest speaker. Discuss what you learned helpful to reflecting back on your past change efforts and looking forward to your ongoing or future ones. YOU MAY SUBMIT A THIRD REFLECTION TO SUBSTITUTE FOR AN EARLIER GRADED REFLECTION. **EACH REFLECTION IS DUE THE FOLLOWING TUESDAY AFTER THE GUEST SESSION USING FOR IT.**

The reflections are worth 20% of your final grade (10% each)

Grading criteria: Goes beyond merely repeating what others have said but clearly links the ideas from the session to your own thinking about strategy and change leadership. Assessment is based on:

- Writing mechanics: logical progression, number of grammatical and spelling errors, clarity of idea sources, accuracy and precision in word choice
- Analytical commentary and critique: captures and critiques ideas presented in course and applies them to new contexts, offers your personal insights related to ideas from others
- Coverage of how and when at least one of the following may affect a change effort and outcome:
  - data quality and availability
  - social capital
  - understanding of destination/vision
  - turbulence, complexity, or uncertainty
  - accountability and outcome metrics
  - personal and professional comfort with change
  - pivot points

(2) **DESIGN YOURSELF AS A CHANGE LEADER AND THE PATH YOU WILL TAKE TO BECOME THE LEADER YOU WISH TO BE:** Submit a two page, single spaced (12 pt. font) description of yourself as the change leader you would like to be. What attributes would you have? What behaviors would you use? On what values would you base your actions? With whom would you share leadership? What would you assume about others involved in a change effort? After describing your ideal of yourself as a change leader, describe your path to be that person. What can you do to become the leader you want to be? If you think you already are that leader, explain why you think so and why you do or do not think your change leadership style will or should change. Be prepared to discuss your reflection and plan in class. **THE DESIGN YOURSELF AS A CHANGE LEADER REPORT IS DUE FEBRUARY 9**

The design yourself report is worth 25% of your final grade

Grading criteria: Report offers a rich description of the leader you want to be and a path to get there. Assessment is based on:

- Writing mechanics: logical progression, number of grammatical and spelling errors, clarity of idea sources, accuracy and precision in word choice
- Description of oneself as leader: rich vision is offered of type of leader you wish to become and how you would approach organizational or systemic change efforts as this leader
- Design plan: has at least three concrete steps you can take to develop as a leader (or very strong argument for why no steps are needed)

(3) **STRATEGY MEMO:** Submit a four page, single-spaced (12 pt. font) discussion of your outline of a change strategy for a situation that you think needs to change. Put yourself into a specific role, theoretical or real, and outline how you would lead as part of the change effort and what would be indicators of your success as a change leader in that situation. As part of the three pages, at the end,

in no more than one page, explain why you think your outlined plan is a good one. Note what is likely to be helpful and what may be a hindrance to you in having a successful plan. You will present your draft plan on March 23 to the class for feedback. Revise your plan based on what you believe is helpful feedback and useful ideas inspired by new course material encountered after your draft and turn in your final memo for grading by May 4. **YOUR DRAFT STRATEGY MEMO IS DUE MARCH 23 and YOUR FINAL MEMO IS DUE NO LATER THAN MAY 4 (MAY BE TURNED IN EARLY)**

The memo is worth 25% of your grade

Grading criteria: The memo needs to incorporate ideas discussed in the course. We are not looking for a logic model as used in a policy or program evaluation. Rather, we are looking for an overall strategy/approach for the change effort with you at the center of at least part of the effort. The assessment is based on:

- Writing mechanics: logical progression, number of grammatical and spelling errors, clarity of idea sources, accuracy and precision in word choice
- Role description: there is clarity about your place in the change effort and how you, personally, would be a leader
- Use of ideas from course: incorporates course concepts and student feedback, demonstrates understanding of specifics of change leadership strategies and elements affecting feasibility of change efforts and perceived likelihood of achieving desired outcomes
- Addresses <u>at least three</u> of the following, how:
    - your view of yourself as a leader influences your strategy
    - data quality and availability influences your strategy
    - social capital influences your strategy
    - understanding of destination/vision influences your strategy
    - turbulence, complexity, or uncertainty influences your strategy
    - accountability and outcome metrics influences your strategy

(4) **GROUP PROJECT:** In a small group, choose a nonprofit organization to investigate as a source of change leadership insights and lessons when there is a focus on participatory decision-making AND/OR collaborative data-sharing. Try to choose one that you think deserves to be commended (and awarded a donation) for the efforts and outcomes of its leaders in using participatory decision-making to drive change OR collaborative data-sharing to make a case for and/or inform change strategies. The team is required to conduct three interviews to learn about the nonprofits' involvement in the change and the connection to participatory decision-making and/or collaborative data-sharing. Reports and other documents can complement the interviews. The nonprofit chosen needs to be officially recognized as a nonprofit in its home country (only use a 501(c)3 in the U.S. if you wish it to be eligible for a donation from an anonymous donor supporting the course and see the instructor for donation eligibility for nonprofits in other countries). The team will present the lessons and insights they gained from the organization in a 15 minute presentation to the class. The team will prepare a 3 to 4 page single-spaced briefing memo outlining what they learned that is useful to other nonprofits in thinking about participatory decision-making and/or data-sharing to support change efforts. The donor will see this memo, and perhaps the presentation.

THE GROUP PROJECT IS DUE APRIL 13

The group project is worth 30% of your grade (15% for the presentation and 15% for the memo)

Grading criteria: The project needs to offer <u>at least three</u> lessons/insights that are generalizable to other change efforts. <u>At least two</u> of the lessons/insights need to relate to participatory decision-

making and or collaborative data-sharing. The project should offer a critique of what they believe went well and not so well in the change effort described by their interviewees. The team should note the degree of consistency across their interviews and the other material they reviewed. They should provide enough information about the change context and the nonprofit and its stakeholders to help the audience understand how much of what is learned is generalizable to other organizations. They should offer a judgment of whether the nonprofit should receive a donation as an award for their participation in learning about change efforts. The assessment criteria is the same for both the presentation and the memo:

- Clarity and organization of presentation of information, verbally and/or in writing
- Visual aids and road maps to help audience follow arguments being made
- Demonstrated ability to work as a team
- Lessons/insights offered fit assignment quantity and type requirements and are clearly connected to what learned from sources
- General implications offered that apply beyond organization examined
- Adequate details on the change context and nonprofit are provided so audience can follow argument made for lessons/insights

Attendance, Participation, and Virtual Environment: Attendance at every session is expected. If unable to attend a class, contact the professors in advance for an excused absence. If you are having significant difficulties with on-line access, please contact GW and request a hot spot. This course will use a blackboard platform for course materials and Zoom for class meetings. We'll record classes for viewing via Blackboard during the semester, unless a guest speaker asks not to be recorded for a segment of a presentation. Some guest speakers may deliver their presentations in an asynchronous format and the class meeting time will be adjusted down to accommodate the time needed for asynchronous viewing of the presentations and asynchronous participation in a discussion board on the session.

Use of Electronic Course Materials and Class Recordings: Students are encouraged to use electronic course materials, including recorded class sessions, for private personal use in connection with their academic program of study. Electronic course materials and recorded class sessions should not be shared or used for non-course related purposes unless express permission has been granted by the instructors. Students who impermissibly share any electronic course materials are subject to discipline under the Student Code of Conduct. Please contact the instructors if you have questions regarding what constitutes permissible or impermissible use of electronic course materials and/or recorded class sessions. Please contact Disability Support Services at disabilitysupport.gwu.edu if you have questions or need assistance in accessing electronic course materials. Academic Commons offers several short videos addressing different virtual learning strategies for the unique circumstances of the fall 2020 and spring 2021 semesters. See academiccommons.gwu.edu/study-skills. They also offer a variety of live virtual workshops to equip students with the tools they need to succeed in a virtual environment. See tinyurl.com/gw-virtual-learning

Academic Integrity Code: Academic Integrity is an integral part of the educational process, and GW takes these matters very seriously. Violations of academic integrity occur when students fail to cite research sources properly, engage in unauthorized collaboration, falsify data, and in other ways outlined in the Code of Academic Integrity. Students accused of academic integrity violations should contact the Office of

Academic Integrity to learn more about their rights and options in the process. Outcomes can range from failure of assignment to expulsion from the University, including a transcript notation. The Office of Academic Integrity maintains a permanent record of the violation. More information is available from the Office of Academic Integrity at studentconduct.gwu.edu/academic-integrity. The University's "Guide of Academic Integrity in Online Learning Environments" is available at studentconduct.gwu.edu/guide-academic-integrity-online-learning-environments. Contact information: rights@gwu.edu or 202-994-6757.

University policy on observance of religious holidays: In accordance with University policy, students should notify faculty during the first week of the semester of their intention to be absent from class on their day(s) of religious observance. For details and policy, see "Religious Holidays" at provost.gwu.edu/policies-procedures-and-guidelines

Disability Support Services (DSS) 202-994-8250: Any student who may need an accommodation based on the potential impact of a disability should contact Disability Support Services to establish eligibility and to coordinate reasonable accommodations. disabilitysupport.gwu.edu

Counseling and Psychological Services 202-994-5300: GW's Colonial Health Center offers counseling and psychological services, supporting mental health and personal development by collaborating directly with students to overcome challenges and difficulties that may interfere with academic, emotional, and personal success. healthcenter.gwu.edu/counseling-and-psychological-services

COURSE SCHEDULE: This syllabus is a guide to the course for students. Sound educational practice requires flexibility and instructors may therefore change content and requirements, if helpful, during the semester.

DATE	TOPIC	NOTES
1/12	**Intro to one another, course design and course resources**	Please ensure you have access to Blackboard site before class session begins. Find the connection information for the first Zoom class session on blackboard.
1/19	**Traditional change management Ideas**	If you have not read about traditional change management and leadership in a textbook chapter, choose one on the voluntary reading list on Blackboard and read it before class. Consider a change effort you have observed or been a part of and be prepared to talk about it in class. We'll discuss long-standing ideas about how to manage change and how this course offers some new ideas about how to think about change leadership.
1/26	**Leadership development process and plan** **GUEST SPEAKER: Dan Cardinali, CEO of Independent Sector**	Bring to class your questions on **the Design Yourself Report** assignment. Start sketching out this assignment before class. Consider whether leaders do or should change their styles when engaged in incremental, revolutionary, or evolutionary change efforts. We'll discuss our guest speaker's leader development path and thoughts about leading change. We'll encourage going beyond standard categories of leadership styles. To be determined (TBD): Readings and videos to prepare before class

2/2	**Change leadership needs and resources** **GUEST SPEAKER: Jonathon Reckford, CEO of Habitat for Humanity, Intl**	GUEST SPEAKER REFLECTION PAPER OPPORTUNITY Think about pivot or tipping points for major change in an organization – what indicated to you that the organization or system was at a change point? We'll talk about capacity for change and leading through types of change efforts and environments. We'll go over the group project assignment and discuss how to identify a good organization to use for it. To be determined: Readings and videos to prepare before class
2/9	**Flying a plane while re-building it**	GUEST SPEAKER REFLECTION PAPER OPPORTUNITY THE DESIGN YOURSELF AS A CHANGE LEADER REPORT DUE FEBRUARY 9 Class will discuss the many ways we lead as part of organizations and systems. We'll also dig into some change dynamics and challenges. Most importantly, we'll talk about students' visions as leaders and plans to achieve these visions. To be determined: Readings and videos to prepare before class
2/16	**Data for change** **GUEST SPEAKER: To be confirmed**	GUEST SPEAKER REFLECTION PAPER OPPORTUNITY Our topic for this session is data choice and its use in determining destinations and the efforts to get to the destination. We'll talk about what leaders may do when there is too much or too little data and when they have concerns about data inconsistency and quality. We'll also talk about data-sharing across various types of boundaries. To be determined: Readings and videos to prepare before class
2/23	**Participatory decision-making in change efforts** **GUEST SPEAKER: To be confirmed**	GUEST SPEAKER REFLECTION PAPER OPPORTUNITY This is the day for us to focus on shared leadership and specific models for participatory decision-making for strategy setting and destination determination. We'll hear from our guest speaker about experiences with encouraging others to be leaders in change efforts. To be determined: Readings and videos to prepare before class
3/2	**Kindness and empathy in change leadership** **GUEST SPEAKER: To be confirmed**	GUEST SPEAKER REFLECTION PAPER OPPORTUNITY What is the role of kindness and empathy in change efforts? How overcome resistance to change or frustration with the pace of change? We'll discuss the real people (with biases) behind the quantitative and qualitative data we may be using and that individuals are affected in sometimes unknown and unintended ways by our change strategies. To be determined: Readings and videos to prepare before class
3/9	**Leader communication and team-building in change efforts** **GUEST SPEAKER: To be confirmed**	GUEST SPEAKER REFLECTION PAPER OPPORTUNITY Communication can be key to the perception of success in change efforts, and the need for change. Teams are often critical to success of change efforts. We'll focus on strategies for building and mobilizing teams that are comfortable in rapidly changing environments. To be determined: Readings and videos to prepare before class

3/16	SPRING BREAK	NO CLASSES
3/23	**Change strategizing**	GUEST SPEAKER REFLECTION PAPER OPPORTUNITY DRAFT STRATEGY MEMO IS DUE We'll spend most of the class sharing drafts and offering feedback to help each other with strategy memos. To be determined: Readings and videos to prepare before class
3/30	**Futurists' predictions and setting your destination** **GUEST SPEAKER: To be confirmed**	What will the world look like ten, twenty years from now? What is the time frame for a change and why does the choice of time frame matter? When can futurist thinking be helpful, even when their predictions are wrong? Lots of room for great discussion with our guest speaker this day. To be determined: Readings and videos to prepare before class
4/6	**Revisiting the old models of change**	THE LAST GUEST SPEAKER REFLECTION PAPER OPPORTUNITY We'll go back to textbook treatments of change leadership and strategic planning and pull more ideas from them to advance our thinking. To be determined: Readings and videos to prepare before class
4/13	**Group Project Presentations** **GUEST APPEARANCE: rep from our funder foundation**	THE GROUP PROJECT IS DUE APRIL 13 Sharing and discussion of group presentations and memos
4/20	**Course Debrief**	We'll debrief as a class about the course. We'll address, as the class desires, any hanging threads of our past conversations and briefly revisit previous course ideas in light of the group project experiences. We'll share parting pearls of wisdom and do final course logistics.
5/4	**FINAL EXAM WEEK**	There is no exam for this course. YOUR FINAL STRATEGY MEMO IS DUE NO LATER THAN MAY 4