Planning for Community and Organizational Change

SW651, Section 001
Monday, 1 - 5 P.M.
Room 3752 SSWB
Office Hours: By Appointment
Office: 2760 SSWB
Spring/Summer, 2002
Instructor: Barbara MacKenzie
Office Phone: (734) 449-3111
Fax: (734) 449-3113
E-mail: mackenzb@umich.edu

Course Description:

This course will examine social planning as a systematic process of developing and implementing plans and programs that promote social justice and well-being at the community level. A range of analytic and interactional tools will be reviewed, including those which assess community strengths and needs, set goals and priorities, formulate action plans, develop organizational structures, build support for implementation, and monitor and evaluate results. This course will also analyze major models of planning practice, the sociopolitical context within which practice takes place, and strategies for expanding institutional relationships and collaborative partnerships aimed at a more equitable distribution of goods, services, and resources.

Course Content:

This course will focus on social planning with regard to problems affecting the most disadvantaged and disenfranchised groups, as well as the interests of potential resource suppliers, legitimators, and competitors for both resources and legitimacy. Emphasis will be placed on the design of interventions leading to the improvement of social services. Areas to be examined will include:

- service availability and accessibility at the community level in addition to accountability, effectiveness, and efficiency;
- service provision in a manner that is both comprehensive and continuous; and
- service appropriateness to various consumer populations.

Students will study the range of analytic and interactional tasks performed by planners at all stages of the planning process (i.e., problem definition and needs assessment, structure building, strategy and goal formulation, plan-making and implementation, monitoring and evaluation). Several analytic and interactional tools will be reviewed.
Since social planners are not free agents who create their own agendas, students will examine the various community structures through which, or under whose auspices, planning is conducted. These community structures include: 1) community-based organizations, 2) public bodies like Area Agencies on Aging, 3) voluntary federations like United Ways and its alternatives (e.g., women’s funds, sectarian and ethnic federations), 4) direct service agencies (e.g., health funds, family service agencies, Y’s and settlement houses), 5) coalitions, and 6) complex social and economic partnerships.

Emphasis will be placed on planning within the context of Social Work's commitment to serving the disadvantaged and with a focus on the diversity and plurality of interests in society. The ethical and moral implications of various planning related action strategies and probable outcomes will be examined using the NASW Code of Ethics as well as other relevant documents.

Course Objectives:

Upon completion of the course, students will be able to:

1. Distinguish between major approaches to social planning.
2. Apply interactive assessment tools to planning problems.
3. Describe the opportunities and constraints under which social planners work in one or more occupational settings.
4. Conduct a strategic social planning analysis.
5. Identify the ethical and moral implications of alternative courses of action.
6. Design a plan for creating, expanding, or improving a service program that is shared with or dependent on a number of institutions at the community level.

Course Design:

Class sessions will include lectures and presentations, small group discussions, and experiential exercises. Students will have opportunities to work on planning projects aimed at expanding or improving services.

Relationship of the Course to Four Curricular Themes:

- Multiculturalism and Diversity. Students will learn that inter-ethnic communication and other forms of intergroup relationships are central to the success of planning efforts, which often must accommodate to the interests of an increasingly diverse public. In addition, planning is often dependent on the ability to secure the commitments of populations that may differ on demographic, geographic, and psychographic characteristics, and on the ability to balance these against larger institutional and organizational interests.
- **Social Justice and Social Change.** Equity is a major theme in contemporary social planning, and this course will focus on how planner's can assure that the interests of the most vulnerable and disadvantaged groups are represented.

- **Promotion, Prevention, Treatment, and Rehabilitation.** Students will learn that planning methods can be used to correct social problems, the conditions that lead to them, and their consequences.

- **Behavioral and Social Science Research.** This course will emphasize research since planning is anchored in research and scientific knowledge, and many of the assessment and evaluative tools are derived from research methodology. For example, Delphi method was originally designed as an interactive survey method for predictive purposes, but is currently more likely to be used to examine the implications of alternative strategies. Likewise, the selection of intervention strategies is often informed by empirical analysis or the systematic application of social theory. For instance, force field analysis is derived from field theory and draws on existing and emerging knowledge of which forces are likely to promote or restrain change.

**Relationship of the Course to Social Work Ethics and Values:**

The ethical and moral implications of various planning related action strategies and probable outcomes will be examined. Relevant insights will be drawn from the NASW Code of Ethics and contrasted with those of other occupational groups (e.g., Association of Black Social Workers, American Institute of Certified Planners, American Institute of Planners, American Society for Public Administration, and others). Since planning is an attempt to influence who, gets what, where, when, and how, this course will focus on the ethical implications of planning decisions. In particular, concerns related to gender equality and sexual integrity, discrimination and reverse discrimination, censorship, and economic justice will be covered.

**Required Readings:**

All required readings are to be completed prior to the class session for which they are assigned. Required readings will be found in the textbooks and handouts. The reading assignments are outlined in this syllabus. The textbooks for this course, available at Ulrich's, Michigan Book and Supply, and Michigan Union Bookstore are:


Additional materials will be handed out in class.
Grading Criteria for Written Assignments:

Reaction and research papers will be graded on the basis of:

a) The quality of the analysis and depth of understanding of the concepts, ideas, and information presented. I will be looking for objective documentation in support of stated opinions or conclusions.
b) The clarity of expression and organization of the paper - is there a logical order to the presentation of your thoughts.
c) The appropriate use of references and resources, and the variety of resources referenced.
d) The use of proper grammar and the over-all professional presentation of the paper.

Grading Criteria for the Course:

Each written assignment will be given a letter grade. The criteria I use are as follows:

**A or A-** Mastery of subject content, demonstration of critical analysis, creativity and/or complexity in completion of assignment. The difference between A and A- is based on the degree to which these skills is demonstrated.

**B+** Mastery of subject content beyond expected competency, but has not demonstrated additional critical analysis, creativity or complexity in the completion of the assignment.

**B** Mastery of subject content at level of expected competency – meets course expectations

**B-** Less than adequate competency, but demonstrates student learning and potential for mastery of subject content.

**C or C-** Demonstrates a minimal understanding of subject content. Significant areas needing improvement to meet course requirements.

**E** Student has failed to demonstrate minimal understanding of subject content.

Please understand that grading is a subjective process. I use these criteria to read and evaluate your papers. If, after you read my feedback, you have further questions, please see me about them.

All written assignments submitted by students should be double spaced in 12 pt. font. Students should use the *Student Guide to the Master’s in Social Work Degree Program* or other style manuals to assist them in writing their papers. Students are strongly encouraged to make and keep a copy of their papers.
The letter grades will be converted to numbers and the grading criteria will follow the School of Social Work’s Grading Policy, as reviewed on pages 14 and 15 of the student guide. Your final grade in the class will be calculated by adding up your scores on the individual assignments using the following schedule:

- 97 - 100 points = A+
- 87 - 89 points = B+
- 77 - 79 points = C+
- 93 - 96 points = A
- 83 - 86 points = B
- 73 - 76 points = C
- 90 - 92 points = A-
- 80 - 82 points = B-
- 70 - 72 points = C-

**Course Assignments**

**Class Participation:** Each week we will engage in group activities and discussion; therefore, attendance is very important. Students can receive up to 20 points for class participation. Each student will complete a self-assessment of class participation that will assist me in assigning these points. Missing a class may affect this grade.

**Written Assignments and Projects:** This course is designed to develop skills for planning and implementing community and organizational change. Planning practice **always** involves the ability to work with others. In order to work toward this goal, we will work in groups to complete three written assignment and one in-class presentation. The process for this assignment is as follows:

1. **Group Project (Total: 65 points):** In our first class we will engage in a survey to ascertain our common interests in social work practice. From this list of interests, groups will be formed to work on group projects. Time will be provided in many class sessions for the groups to plan and work together toward goals. The instructor will always be available as a consultant to guide the group process. Each group can decide if individual or group grades will be given. The group will work on the following assignments

   A. **Defining the Issue and Literature Review (15 points):** Planning practice requires the ability to work toward set goals and objectives. This process is dependent on identifying issues and possible outcomes. This paper should have two parts:

      1. Identify and describe the problem, issue or situation which is the focus of your group project. This will include a review of relevant literature about the problem in general and current efforts to address it.
      2. Based on this discussion, present a vision for change that reflects community, organizational and individual levels.
Due: June 3rd

B. Analyzing the Larger Social System (15 points): Effective planning practice requires skills in analyzing and assessing large social systems. This paper should identify and describe a particular community or organization which will be the focus of your intervention. In writing the paper, use the tools for organizational and community analysis which we have covered in class and in the text. The description should answer the following questions:

1. Briefly describe the community or organization: its composition, goals, formal and informal structures, norms or rules, resource base, sources of power.
2. What different formal and informal roles do members of groups based on gender, race, ethnicity or sexual preference play in the organization?
3. What do you now see as the major strengths and weaknesses of the community or organization. What is working? What could be improved?
4. To what extent does the community or organization help or hinder the interests and needs of different groups within it?
5. Review your first paper, use this information to identify activities that could achieve your vision.

Due: June 24th

C. Developing an Action Plan (15 points): Engaging in planning practice requires using existing knowledge to select appropriate strategies and to evaluate them. In this paper, use the material covered in class and in the two previous papers to develop a plan for meeting the goals and objectives with a community or organizational intervention. This paper should consist of two parts:

1. Follow a strategic planning process and present a summary of your plan in narrative form.
2. Specifically identify ways in which the effectiveness of the plan will be evaluated.

Both the intervention and evaluation plan must indicate ways in which the needs and strengths of women, people of color and gay men and lesbians will be addressed.

Due: July 15th

D. Class Presentation (20 points): Planning with organizations and communities involves being able to present ideas effectively to others. A group class presentation will provide the opportunity to learn skills in presenting to task groups. The presentation should be 1 hour in length and focus on how the group’s topic can illustrate the concepts for that week. For example, if the topic is
community assessment, the group for that week can describe or lead a discussion of their community of interest and how they are going about assessing it. The class presentation will be peer and self-evaluated.

**Students will sign up for presentation date at the end of the 2nd class period.**

2. **Reflection Paper (15 points):** In our first class, we will each identify a question or issue regarding planning that we would like “answered” in this course. This 4-6 page paper should be a discussion and analysis of how well you were able to address this question through your readings, class participation and assignments. In this paper, describe the question, why you were interested in it, what you learned and what you hope to learn about this issue in the future.

**Due: July 22nd**

**Course Syllabus**

**May 6**

**Overview**
- Course overview
- Introductions
- Student skills/interest survey
- *Holding Ground* video

**May 13**

**Review & Basics**
- Review social planning and social work practice models with communities
- Definitions of communities
- Roles of organizational and community planners
- Ethical issues in planning

*Reading Assignment*

*Tropman*, Chapters 1 – 6, 27
*Warren*, Chapters 1 & 2

**May 20**

**Assessment I: Identifying Issues, Problems, Conditions and “Change Opportunities”**
- Methods for identifying needs, issues and problems in organizations and communities
- Methods for eliciting multiple views of organizational and community conditions

*Reading Assignment*

*Tropman*, Chapters 7 – 10
May 27  Memorial Day – No Class!

June 3  Assessment II:  Practical Applications & Case Study  
Class Presentation #1

Reading Assignment
Warren, Chapter 3

June 10  Decision making I  
- Value conflicts in planning  
- Building effective teams  
- Developing and assessing vision, mission and goals

Reading Assignment
Tropman, Chapters 11 – 14

June 17  Decision making II:  Practical Applications & Case Study  
Class Presentation #2

Reading Assignment
Warren, Chapters 4 & 5

June 24  Mobilization I  
- Implementation planning  
- Tools and methods for using groups to develop plans  
- Participatory methodology

Reading Assignment
Tropman, Chapters 15 – 19

July 1  Mobilization II:  Practical Applications & Case Study  
Class Presentation #3

Reading Assignment
Warren, Chapters 6 & 7
July 8  Evaluation I
• Methods for evaluating community or organization plans
• Roles of constituencies, stakeholders and auspices in evaluation
• Standards of evaluation
• Empowerment evaluation principles

Reading Assignment
Tropman, Chapters 20, 21, 22, 25 and 28

July 15  Evaluation II: Practical Applications
Class Presentation #4

Reading Assignment
Tropman, Chapters 23, 24, 26 and 29

July 22  Management and Administration Issues

Reading Assignment
Tropman, Chapters 30, 31, 33, 34, 35
Warren, Chapters 8 & 9

Supplemental Materials


Journal of the American Planning Association
Journal of Community Practice
Social Development Issues
Social Service Review
Strategic Management Journal