Organizational Planning and Policy Analysis: Combining Theory with Experiential Learning

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ABSTRACT: Planning is vital to the continued effectiveness of educational institutions. The course described in this paper succeeds in combining two crucial elements of a student's comprehension of the planning process: first, an overview of the strategic planning literature provides a theoretical underpinning; then, an experiential planning exercise reinforces and extends the student's appreciation for this complex process. This course focuses on the alternative futures approach to planning. This approach has the added benefits of linking a study of relevant developments in the real world, through the planning process, with strategy formulation for the simulated institution.

The importance of planning to educational institutions has been well documented recently (Cope, 1987; Morrison, Renfro, & Boucher, 1984; Norris & Poulton, 1987; Ellison, 1977). As educators of educators, colleges of education have an obligation to keep abreast of the latest developments in fields such as planning, and attempt to incorporate such topics into curricula where appropriate. To meet this need among masters and doctoral students in education, "Organizational Planning and Policy Analysis" was developed and presented as a graduate level course in the School of Education, The University of North Carolina at Chapel Hill.

Planning is a process. The best way to gain an understanding of such a process is by practice and experience. This course was therefore designed to merge a study of more traditional planning literature with two highly innovative features. First, the main pedagogical tool was a simulation. The students took on the roles of the division chiefs of the United States Department of Education (DOE) to plan for the future of U.S. education. Further, the planning process used for the simulation was the state-of-the-art "alternative futures approach" which is in-

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creasingly being adopted by planners in both the private and public sectors throughout the world.

This paper describes how the course was designed to accomplish its objectives, refers to the process and accomplishments that eventuated, evaluates the success of the course, and suggests improvements. It has been written in such a way as to supplement existing literature in providing a model for replication of this course in other settings.

The Course

The course objectives were stated as follows:

1. introduce students to the literature on the nature and history of educational planning, strategic planning, tactical planning, and decision support for organizational planning and policy analysis; and,
2. provide students with experience in organizational planning and policy analysis in a simulated educational organization (public school district, two-year college, or four-year college).

The class syllabus for the course reflected these objectives and listed the required readings and assignments. Although the "literature" aspect was stressed in the first half of the course, and the "experiential" aspect in the latter part, there was a blending of the two emphases throughout. [We will now attempt to explain how this was accomplished.]

The First Two Classes

In addition to the usual start-of-course formalities, two important initial stages of the planning process were dealt with. First, the class had to constitute itself into a planning team. Each student took on the role of a division chief in the DOE. The instructor acted as facilitator for the process. Second, the students were introduced to environmental scanning. The aim of environmental scanning is to systematically monitor various publications that span the social, economic, technological and political sectors of society for signals of potential changes that may affect education (Morrison, 1985, 1987). Each student was responsible for scanning a selection of newspapers and journals listed in the course syllabus. Scanning concentrated on kindergarten through