Developing Strategies for Social Impact — MGMT 579
Course Syllabus, Winter 2021

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Email is typically the most reliable and fastest way to reach me. If you need to get a hold of me urgently, please call my office and leave a message with my assistant

Office Hours: By appointment. Please email me with suggested meeting times. I enjoy a healthy exchange of ideas with students and welcome the chance to meet in person or via phone whenever our schedules align. I am open to whatever fits our schedules.

WHY IS THIS TOPIC IMPORTANT?

Social impact issues stare us in the face. The pandemic and its debilitating impact on lives and livelihoods has only exacerbated our collective societal pain. Our burgeoning homeless population amidst communities of rising affluence, the dramatic increases in opioid deaths, escalating poverty in inner cities, an abysmal lack of healthcare especially for the poor, low literacy and numeracy outcomes, to name a few. Such issues usually involve multiple stakeholders with non-overlapping agendas, fractured decision-making and rely on low quality data that tend to be sparse, unreliable, siloed and contradictory. The tools and techniques used to solve these problems are generally unsophisticated. The best thinking deployed to solve commercially more interesting problems is rarely put to use to solve social impact issues. The intent of this class is to develop a pool of talent that can use tools, techniques and sophisticated strategic thinking to solve some of society's more challenging social problems.

WHAT WILL I GET OUT OF THIS COURSE?

This course considers the fundamental elements of strategy within the context of an important social challenge. Students will learn McKinsey's approach to problem solving, including theory and analytical techniques, to solve ambiguous problems. The learnings from this class are applicable to addressing challenges in both business and society and will give students the tools to elevate the impact of their ideas on the world.

Through the course, students will:
- As part of a group: Prepare a comprehensive strategy to address a social topic affecting Washington State: Refugees, the Opioid crisis, or Healthcare.
- As an individual assignment: Prepare an analytical assessment of the cost of homelessness
- Conduct a literature review and identify private and public sources of data

- Undergo field work to collect data through expert interviews
- Challenge, clean, and aggregate data from disparate sources
- Build models and analyze "what if" scenarios
- Bring a quantitative "hard numbers" approach to bear on a social topic and address areas of ambiguity or imperfect data
- Develop solutions that lead to impact with consideration of feasibility and cost to implement
- Prepare a compelling presentation to a diverse steering committee of thought leaders from business, non-profit and government

HOW WILL I LEARN IN THIS COURSE? WHAT IS THE FORMAT FOR THE COURSE?

Each class session will consist of 90 minutes of theory and discussion on a strategy topic led by the instructor and 90 minutes of student presentation of the week's group assignment. Students will receive their grade for the group assignment each week by the end of that day, so no late submissions will be permitted.

Group projects will be conducted in groups of 4-5, one group per social topic (e.g., refugees, opioids healthcare). Students will rank their preference amongst the topics, and the instructors will try to accommodate these preferences, but may ultimately be assigned their 2nd or 3rd choice topic.

In addition, there will be one individual assignment to be turned in at the end of the course. For example in past years the topic was "Estimating the cost of homelessness on society". This is the only assignment that students will be expected to work on individually with no group participation.

WHAT ARE MY RESPONSIBILITIES WITH RESPECT TO LEARNING IN THIS COURSE?

As a student, you have the following responsibilities.

1. Come prepared to every class by completing required readings and doing assignments before each class session. Participate fully during the active learning experiences in class sessions. Participating fully also means speaking your mind, listening critically to others, and following-up for yourself by summarizing your own learning at the end of class meetings.

2. Make comments during class that advance the learning experience and fit with the flow of the course, asking polite questions when you don't understand.

3. Complete all work on time and with proper reflection.

4. Review feedback on submitted material, asking yourself what you might do differently next time.

5. Treat your classmates and the learning experience in the course with respect.

WHAT ARE THE INSTRUCTOR'S RESPONSIBILITIES WITH RESPECT TO MY LEARNING?

As your instructor, I have the following responsibilities:

1. Come prepared to every meeting with a well thought-out class session and engaging, meaningful application of content.

2. Consider that it is not always your fault if you do not understand the material or its application.

3. Strive for a mutually respectful classroom environment.

4. Recognize that sometimes I may grade a question incorrectly or make an error in content delivery and thus not get defensive when you politely question the grading or us.

HOW ARE THE TOPICS COVERED IN THE COURSE ORGANIZED?

The course will entail developing a strategy on a given social impact topic (say poverty in King County). The intent is for you to work in 4-5 person team to do this. Each lecture will expose you to some of the problem-solving tools and techniques used in strategy development. You will then use these tools to gather data, build models, explore insights and develop recommendations. The course is intentionally a "hands on" exercise on a real-world social value topic. Students will work in teams and make formal presentations to the broader class. Each class session of 3 hours will entail some level of teaching of new frameworks and tools as well as deep-dives into problem-solving on progress made to date by the team. Reading will be assigned at the beginning of the term and during the class. At the end of the class you will have:

1. Broad exposure to a social impact topic, an understanding of the root causes, the underlying economics, key forces at play and their impact on individuals and society
2. Deep hands-on experience in the tools and techniques typically used to solve amorphous and complex issues. These tools have broad applicability to strategy development beyond non-profits

COURSE SCHEDULE

Week(s)	Topic	Deliverable
Week 1	Introduction to the course	
	Why we develop strategies for social impact	
	Understanding the McKinsey "Strategy Method"	
	Collecting and collating data	
	Triangulating data from multiple independent sources	
Week 2	Building MECE heatmaps	Heatmap by key segments
	Exploring best options in segmenting the data	
	Building issue trees/hypothesis trees and generating workplans	
	Developing "Day 1 answers"	
Week 3	Guest speaker/field trip	Day 1 ghost deck
	Parsing and analyzing data	
Week 4	Structuring and building models	
	Understanding root cause drivers – correlation vs causation	

Week 5	Looking for 2nd order insights Refining ghost decks	Refined ghost deck and preliminary view of answer
Week 6	Guest speaker/field trip Storylining – situation, complication, resolution	
Week 7-8	Building a comprehensive plan and testing for feasibility Developing actionable recommendations Finalizing the report-out deck and tightening storylines	"Near final" report out deck
Week 9	Guest speaker/field trip Preparation for final read-outs and Q&A	
Week 10	Final report-outs and presentations	Final presentations

The general bias will be to use McKinsey's methodologies for strategic problem solving although individuals will be encouraged to choose alternative creative modeling and presentation techniques.

WHAT IS THE PURPOSE OF THE ASSIGNMENTS AND FINAL PRESENTATION?

Written deliverables in the course are designed to allow you to put your classroom learnings into practice. Each subsequent deliverable builds upon the rest to create an integrated "answer" for the societal problem at hand. The final group presentation allows you to receive feedback on your answer from thought leaders in your topic and immediately assess the impact of your work.

The individual assignment, the Cost of Homelessness, allows you to 1) demonstrate your leanings independently from your teammates, and 2) build an analytical answer using the techniques we learned in class without input from the instructors.

HOW WILL MY WORK IN THE COURSE BE GRADED?

My goal in evaluating your work is not merely to judge but also to provide feedback that is comprehensible and actionable. At times this will take the form of personalized comments on your submissions; on other occasions this feedback may be in the form of suggested solutions for assigned exercises. It is also worth noting that while I have no stake in your individual grade in the course, *I care a great deal about the knowledge and insights that you personally take away from the class as well as the reliability & validity of the grading system*. If, in the interest of learning, you would like additional feedback regarding your written submissions or your overall performance, please ask. I am happy to spend as much time as you feel is needed to improve this aspect of your learning in the course.

Your work within the class will be evaluated on several dimensions. Details about each submitted deliverable, including instructor expectations regarding content, format, length, etc., will be provided via assignment guides available in Canvas prior to due dates. If submission requirements are unclear after

viewing the assignment guide that is posted on Canvas for each deliverable, please contact either member of the teaching team for further guidance.

The weighting of the various grade components is as follows.

Session 2: Problem statement, Heatmap	10%
Session 3: Workplan, Issue and hypothesis trees	10%
Session 4: Day 1 ghost deck	10%
Session 5: Model structure	10%
Session 6: Refined ghost deck	10%
Session 7: Killer analysis and 2nd order insight	10%
Session 8: Near-final answer	10%
Session 10: Final group presentation	20%
Session 10: Final individual presentation on the Cost of Homelessness	10%

End of quarter course grades will be assigned using the scale reflected below.

% Grade	Course grade
94% and above	4.0
93-94%	3.9
92-93%	3.8
91-92%	3.7
90-91%	3.6
89-90%	3.5
88-89%	3.4
87-88%	3.3
86-87%	3.2
85-86%	3.1
84-85%	3.0
83-84%	2.9
82-83%	2.8
81-82%	2.7
Below 81%	Ouch

HOW DOES THE HONOR CODE APPLY TO MY WORK IN THIS COURSE?

In order to maximize the student learning experience, the individual assignment work you submit should be your own. Other than working with fellow team members in accord within the boundaries outlined below, please do not seek or consider outside sources of information in preparing deliverables for the course. This includes students currently or formerly enrolled in the course as well as others outside Foster.

In accord with Foster Masters Programs policy, I will use Canvas's Simcheck feature (a plagiarism prevention service) to maintain academic integrity.

WHAT SHOULD I DO IF I HAVE TO MISS A CLASS MEETING?

Given the active learning experience focus of our class meetings and the relatively small number of meeting dates, missing a class meeting is not a great idea. But I recognize that personal emergencies, illness, professional commitments, and the like may interfere with your ability to attend class meetings. If you have to miss a class meeting, please let us know via email in advance. You will still be responsible for the learning experience delivered in the missed class meeting. But I may be able to provide you with helpful information such as an overview of the active learning experience you will miss

Washington state law requires that UW develop a policy for accommodation of student absences or significant hardship due to reasons of faith or conscience, or for organized religious activities. The UW's policy, including more information about how to request an accommodation, is available at Religious Accommodations Policy (https://registrar.washington.edu/staffandfaculty/religious-accommodations-policy/). Accommodations must be requested within the first two weeks of this course using the Religious Accommodations Request form (https://registrar.washington.edu/students/religious-accommodations-request/).

You should also check Canvas for the PowerPoint-based electronic handouts that I will make available immediately prior to class meetings on the appropriate page of the Canvas site; this is also useful when you do attend class in the event that you want to take notes electronically). Given the nature of the active learning experience in the course, these handouts are much more guideposts than surrogates for class attendance. If you must miss a class meeting, I would urge you to download a copy of the handouts, discuss them within your learning team, follow-up with me at your earliest convenience regarding any lingering questions or concerns you might have regarding session content, and complete the active learning experience exercise that I will provide upon request.

WHAT IS THE POLICY ON ACCESS AND ACCOMMODATIONS?

Your experience in this class is important to me. If you have already established accommodations with Disability Resources for Students (DRS), please communicate your approved accommodations to me at your earliest convenience so we can discuss your needs in this course.

If you have not yet established services through DRS, but have a temporary health condition or permanent disability that requires accommodations (conditions include but not limited to; mental health, attention-related, learning, vision, hearing, physical or health impacts), you are welcome to contact DRS at 206-543-8924 or uwdrs@uw.edu or disability.uw.edu.

WHAT IS THE POLICY ON USE OF TECHNOLOGY DURING CLASS?

While you are free to use technologies that are directly related to class (e.g., a computer for note taking or accessing a supporting Excel file or web page), please otherwise refrain from use of computer, mobile, and similar technologies during class, other than use that would facilitate the purpose or objectives of the class. Research clearly indicates that your use of technology other than for engaging in the activities associated with the class is distracting for both you and for your fellow students. The evidence basis for the distracting effect of technology in educational settings is quite strong, and it would be a mistake to think that those findings do not apply to you and your peers. Please exercise your judgment appropriately.

WHAT ARE THE CHARACTERISTICS OF HISTORICALLY STRONG CONTRIBUTORS TO CLASS DISCUSSION?

Strong contributors to large group discussions in class balance quality and quantity, striving to get a few key points across. They also listen actively to their peers, and they provide critical yet positively-focused feedback. A few more specific characteristics of historically strong contributors to class discussion are listed below.

- They are well prepared, and their comments reflect it. They come to class with an informed opinion about the challenges & opportunities associated with marketing innovations and have tentative ideas about the application of this content.

- They listen effectively. Their comments are linked to both the suggested readings and previous discussions in the class.

- They are succinct.

- They have a sense of process in the class. That is, they understand where the class has been and where the discussion is going; their comments facilitate that process.

- They can tie their comments to concepts or analytic tools developed earlier in the course, in other courses, or in the reading materials.

- They are enjoying the process, and their tone of expression and body language indicates it.

IS THERE ANYTHING ELSE I SHOULD KNOW?

Lots, actually. Here are a few of the more important guidelines.

1. Please submit your deliverables on time.

2. While I recognize that specific team members may take the lead in any given team assignment, every team member should participate in completing the case assignments and innovative product plan project. That is the only way to ensure that you have mastered course material. Similarly, the length of time afforded for our team presentation may not allow all team members to play an active role in either or both in-class presentations. We strongly suggest that you consider rotating responsibility for in-class presentations across team members, both within this course and across other courses in the MBA Program. Delivering presentations in an engaging, clear, concise, and compelling manner is a critical transactional leadership skill, and I urge you to use the organic lab of required presentations in MBA courses to help accelerate your development in this area.

3. Most importantly, *help me help you*. My deepest motivation in the course is to create an environment that helps you learn, and my goal is to maximize the aggregate learning of the group while maintaining a reasonable level of student satisfaction. When there are trade-offs between the two goals, I have chosen the former as my primary focus. On the whole, I have created the learning experience after careful consideration of my knowledge of the field and the literature on learning, the opinions of experts, and feedback from prior to students.

   What I don't know is you… your unique strengths, your unique challenges, and what makes your learning special and different. If there is something about the course that is not facilitating your learning, please let us know ASAP. Given the diverse student body, I cannot arrange everything about the course in a way that pleases everyone; but I promise to listen and—where I can—act to improve the learning experience for you.

Appendix A: *Course Learning Objectives*

Scoping the problem
- Conduct a literature review to quickly build students' knowledge and background of their selected social topic
- Bound the social problem into a "solvable" 10-week chunk to avoid boiling the ocean

Building a fact base
- Identify quantitative and qualitative sources of insight
- Build an expert interview list to 1) ensure a fullness of insight across key elements of the social topic and 2) consider the perspective of all key stakeholders
- Collect, clean, collate and triangulate the data into an integrated, referenced dataset which can be challenged and investigated
    - Identify areas of overlap and inconsistencies in the data and create a defensible plan to address these to build a holistic dataset
    - Determine the representative level of precision in the data to avoid being "inaccurately precise"
- Segment the data into a mutually-exclusive, collectively-exhaustive (MECE) framework
- Synthesize the dataset into a meaningful heatmap to identify trends and areas for deeper analysis

Getting to a Day 1 answer and laying the groundwork for problem solving
- Use insights gathered from data exploration to build an issue tree (a MECE set of underlying causes for the problem) and a hypothesis tree (a MECE set of potential solutions)
- Develop a 7-week workplan with planned analyses to prove or disprove hypotheses and solve the problem
- Develop a "Day 1 answer" based on learnings to date
    - Day 1 answers will be nuanced despite a limited time for investigation
    - Create a ghost deck following the initial storyline that shows the analyses to be conducted

Building a model and analyzing data
- Build a structured model with inputs, analyses and outputs to enable scenario analysis and investigate potential solutions
- Use multiple sets of data and perspectives to identify 2nd order insights
    - Explain the difference between a 2nd order insight and an immediate takeaway
- Use statistics to describe the difference between correlation vs causation
    - Identify the limits of what can be "proved" from the model
- Refine the ghost deck based on insights gathered through the model building and investigation

Communicating for impact
- Develop a storyline highlighting the "situation, complication and resolution"
- Build a comprehensive plan and actionable set of recommendations
    - Identify and assess feasibility in terms of cost, time to impact and political will
- Synthesize full storyline and analyses to create a 20-minute presentation
- Present findings to a Steering Committee of business, philanthropic and government leaders