Course Description

This course teaches the theory and practice of performance measurement and management systems and demonstrates how measuring and managing performance is critical to achieving mission, strategy, and high performance in public, non-profit and healthcare organizations. It will cover how theories of change, logic models and accompanying measures are used to connect the mission of an organization to daily programming and will demonstrate how to implement a performance management system to achieve desired organizational outputs and outcomes. The course also highlights the challenges of navigating the conflicting accountability demands of organizational stakeholders and the need for leadership and management acumen to address this complexity and ensure the achievement of meaningful, significant and sustainable results.

Class Format

Class learning is facilitated through case studies and supportive readings along with lectures, class discussions, and group work. You are encouraged to engage in active listening to your colleagues, offer your own perspective, and reflect on the discussions and lectures. It is essential and required that students be prepared for each class. Class learning will also be supplemented with online content and
complementary journal assignments. In addition, it is highly recommended that students identify a study partner to prepare for class.

**Course Readings**

The required readings for this class will come from the following:


- **Course Packet** – The course packet contains the case studies listed in the syllabus. It is available through the NYU Bookstore.

- **NYU Classes** – Articles, study questions, journal assignments, the mid-term examination, team project description and general announcements will be posted on NYU Classes.

- **e-Books** – both available for free download at [http://leapofreason.org/](http://leapofreason.org/)

**Course Grading & Requirements**

Grades will be based on the following criteria:

- **Class Participation (20%)** – Participation includes promptness, preparation, presence and engagement. Students are expected to attend all classes. Please email me before the class if you will be absent. Use of devices for purposes other than taking notes is not appropriate and can limit student learning.

- **Journal Assignments (20%)** – Students will complete at least 4 of 5 online learning assignments, which will be due before class as noted in the syllabus. Some of these assignments require the student to watch a video and respond to related questions (max of 600 words), or complete a task. If all 5 assignments are completed, the top 4 grades will be selected.

- **Mid-term Examination (20%)** – The mid-term examination will be distributed in class and on NYU Classes.

- **Team Project (40%)** – The Team Project will consist of four elements:
  - 1 to 2 page team charter to codify team responsibilities (5%)
  - 2 to 3 page abstract outlining student project (5%)
  - Presentation to the class on student project (10%)
- a 10- to 15-page paper excluding references and appendices (20%).

## Course Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Class Topic</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 January 24</td>
<td>Class Introduction</td>
<td></td>
</tr>
<tr>
<td>2 January 31</td>
<td>Performance Measurement, Logic Models, and Nonprofit Strategy</td>
<td>Journal Assignment 1 Due</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Teams Assigned</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Team Project Distributed</td>
</tr>
<tr>
<td>3 February 7</td>
<td>The PMM Development Process</td>
<td>Journal Assignment 2 Due</td>
</tr>
<tr>
<td>4 February 14</td>
<td>Outcomes and Indicators</td>
<td>Team Charter Due</td>
</tr>
<tr>
<td>5 February 21</td>
<td>Building and Using Dashboards for Organizational Improvement</td>
<td>Journal Assignment 3 Due</td>
</tr>
<tr>
<td>6 February 28</td>
<td>PPM and Accountability: Managing Conflicting Priorities</td>
<td>Journal Assignment 4 Due</td>
</tr>
<tr>
<td></td>
<td>Friday, March 2 by 5:00 pm</td>
<td>Team Abstract Due</td>
</tr>
<tr>
<td>7 March 7</td>
<td>Performance Measurement from a Government Perspective</td>
<td>Midterm Distributed</td>
</tr>
<tr>
<td></td>
<td>Spring Break</td>
<td></td>
</tr>
<tr>
<td>8 March 21</td>
<td>Performance Measurement from a Funder’s Perspective: Foundations and Investors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sunday, March 25 by 11:00 pm</td>
<td>Midterm Due</td>
</tr>
<tr>
<td>9 March 28</td>
<td>Outcomes from a Healthcare Perspective</td>
<td></td>
</tr>
<tr>
<td>10 April 4</td>
<td>Agency-Wide Indicator, Reporting and Accountability Systems</td>
<td></td>
</tr>
<tr>
<td>11 April 11</td>
<td>Collective Impact</td>
<td>Journal Assignment 5 Due</td>
</tr>
</tbody>
</table>
### Journal Assignments

<table>
<thead>
<tr>
<th>#</th>
<th>Title</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Why Performance Management?</td>
<td>Watch the videos. Based on the comments of government and nonprofit leaders, and based on your experience, why is performance management and the use of data necessary for social sector organizations? Why do you think this class is a required course for management students at Wagner?</td>
</tr>
<tr>
<td>2</td>
<td>Developing a Logic Model</td>
<td>Create a basic logic model with inputs, activities, outputs, short term outcomes and long term outcomes for Jumpstart’s services to children.</td>
</tr>
<tr>
<td>3</td>
<td>Creating Organizational Unity on Performance Measures</td>
<td>Watch the video. While Year Up has a common outcome that the organization strives to achieve, each unit works towards and is measured by specific outputs. Based on what Cat discussed and what you have learned in class, what would you recommend Year Up do to develop more aligned measures and improve its performance culture.</td>
</tr>
<tr>
<td>4</td>
<td>BRC Quarterly Performance Review Meeting</td>
<td>Watch the video. What are some of your reflections on the BRC Quarterly Performance Review Meeting from a performance management perspective? What do you like or not like about Muzzy Rosenblatt’s approach in the meeting and the input of other participants in the meeting? Given what you have learned this semester, if you were in his seat, what would you do the same or differently? Why?</td>
</tr>
</tbody>
</table>

| Monday, May 7 by 11:00 pm | Team Paper Due |

**Leadership in Performance Management**

**Team Project Presentations**

**Class 13 – Team Presentations**

**Class 14 – Team Presentations**
When people talk about CompStat, they often conflate the management practices of using data for accountability with the completely separate issue of police tactics like “broken window” policing or police strategies like “getting guns off the street”. Setting aside the issues of police strategy and tactics, focus on how CompStat was used as a management and leadership tool. How effective of a management tool is it? How are you defining its success or failure? How could it be more effective? And what are the leadership behaviors necessary for it to remain effective?

### Detailed Course Schedule and Readings

#### Class 1. Introduction (January 24)
This class will enable both students and the professor to share their expectations and goals for the class. The syllabus will be distributed and reviewed there will be a lecture/discussion about how to read, analyze and discuss cases. We will also spend some time to get to know each other better.

- Book: Poister Chapter 1
- Book: Marino Introduction, Chapter 1, Chapter 2, and supplemental essay “First, Do No Harm…Then Do More Good” By Isaac Castillo

#### Class 2. Performance Measurement, Logic Models, and Nonprofit Strategy (January 31)
This class will focus on understanding and developing logic models and theories of change and how they align performance measurement and management with an organization’s mission and strategy. The Team Project will be distributed and discussed.

**Journal Assignment 1 due – Why Performance Management?**
Teams will be assigned this class.

- Book: Poister Chapter 2
- Book: Hunter pp. 25-50

**Class 3. The PMM Development Process** (February 7)
This class will cover the audiences for and uses of performance measures, and the process of developing performance measures and an overall system for performance management.

**Journal Assignment 2 due – Logic Model**

● Book: Poister Chapter 3, 4 and 15

**Class 4. Outcomes and Indicators** (February 14)
This class will define the hierarchy of outcomes, indicators, and measures and demonstrate how they flow from and support an organization’s mission, strategy, and operations.

**Team charter due**
- Book: Poister Chapter 5

### Class 5. Building and Using Dashboards for Organizational Improvement (February 21)
This class will focus on the development of technology-based dashboards that support performance measurement and management.

#### Journal Assignment 3 due – Creating Organizational Unity on Performance Measures
- Book: Poister Chapter 6
- Case: A. Grossman, J. P. Honan, C. King (2005) Learning to Manage with Data in Duval County Public Schools: Lake Shore Middle School
- NYU Classes: Duarte, N. (2014, April 14) The Quick and Dirty on Data Visualization, HBR
- NYU Classes: City of Boston, *CityScore Dashboard*
- NYU Classes: New York City Department of Education, *2016 School Performance Dashboard*

### Class 6. PMM and Accountability: Managing Conflicting Priorities (February 28)
This class examines the challenges on organizations to manage competing accountability demands of external stakeholders while enabling learning and performance internally.

#### Journal Assignment 4 due – BRC Quarterly Performance Review Meeting
Class 7. **Performance Measurement from a Funder’s Perspective: Government** (March 7)
This class will highlight the challenges associated with developing and implementing an equitable and results-oriented performance-based contracting methodology in the public sector.

No assignment due

- Book: Poister Chapter 11 and 14
- NYU Classes: How to Use Evidence in the Contracting Process (2016), The Pew Charitable Trust

Class 8. **Performance Measurement from a Funder’s Perspective: Foundations & Investors** (March 21)
This class will focus on how funders decide which programs and initiatives to support with a particular emphasis on measuring and paying for impact.

No assignment due
• Book: Poister Chapter 13
• NYU Classes: Video: Robin Hood: Driving Mission through Relentless Monetization.
• NYU Classes: Stid D. (2013, April) Pay for Success is Not a Panacea, Community Development Investment Review, Federal Reserve Bank of San Francisco

*** MIDTERM DUE Sunday, March 25 by 11:00PM ***

Class 9. Performance Measurement and Management from a Healthcare Perspective (March 28)
This class will examine the importance of measuring ultimate outcomes (as opposed to inputs or outputs) and strategies for doing so. The case examines the complexity of developing realistic and meaningful outcomes from the perspective of patients, physicians, hospitals and researchers.

No assignment due

• Book: Poister Chapter 7
• NYU Classes: Gawande, A., (January 24, 2011) The Hot Spotters - Can we lower medical costs by giving the neediest patients better care? The New Yorker.

Class 10. **Agency-Wide Indicator, Reporting and Accountability Systems** (April 4)
This class will explore how an agency-wide focus on selected outcomes has the potential of dramatic results, while at the same time raising questions about its consequences on community impact.

No assignment due

- Book: Poister Chapter 12
- Online: [https://compstat.nypdonline.org/](https://compstat.nypdonline.org/)
Class 11. **Collective Impact** (April 11)
This class will explore the basics of the collective impact model and how performance measurement and management is key to its success.

**Journal Assignment 5 due – CompStat: Differentiating Management Tool vs. Police Tactics**


Class 12. **Leadership in Performance Management** (April 18)
This class will focus on the role of leadership and management in achieving the promise of PMM.

**No assignment due**

- Book: Morino Chapters 3-4

***TEAM SLIDES DUE Sunday April 22 by 8:00pm***

Class 13. **Team Project Presentations** (April 25)
- Each team will present its project which will be followed by a class discussion and critique.

Class 14. **Team Project Presentations** (May 2)
● Each team will present its project which will be followed by a class discussion and critique.

***TEAM PAPER DUE May 7 by 11:00 pm***