Course Description

This course focuses on how performance measurements are becoming increasingly important in public, non-profit and healthcare settings. It will ground students in the fundamentals of performance measurement systems and demonstrate how they are critical from a mission, strategic, funding, transparency and accountability perspective. It will cover not only how to select appropriate measures, but also how to implement a performance measurement system and use performance measures in managing an organization. In addition, the course will highlight the need for leadership and management acumen to ensure success in achieving meaningful, significant and lasting results.

Class Format

Class learning will be primarily through case studies and supportive readings along with lectures and group work. 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. The class sessions will consist of listening to our colleagues, offering our perspectives, and reflecting on the discourse.
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. Available in electronic form through the NYU Bookstore.

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

Course Requirements

Grades will be based on the following criteria:

- Class Participation (20%) – Participation includes presence, promptness, preparation, and engagement. Students are expected to attend all classes (with no more than one excused absence during the semester). Please email your professor before the class if you will be absent. Use of devices for purposes other than taking notes is not appropriate and can limit one’s learning.

- Journal Assignments (15%) – Students will choose 8 out of 11 online learning assignments, which will be due before class as noted in the syllabus. Each assignment (maximum of 300 words) requires the student to watch a video or webinar and respond to related questions.

- Mid-term Examination (25%) – The mid-term examination will be distributed in class and on NYU Classes.

- Team Project (40%) – The Team Project will consist of three elements:
  - a 2 to 3 page abstract outlining your project (10%),
  - a presentation to the class on your project and a 10 to 15 page paper excluding references and appendices (30%).
# Course Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Item</th>
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<tbody>
<tr>
<td>Sept 3</td>
<td>Class 1</td>
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<td>Sept 10</td>
<td>Class 2</td>
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<td></td>
<td>Teams Assigned</td>
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<td></td>
<td>Team Project Distributed</td>
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<tr>
<td>Sept 17</td>
<td>Class 3 – Journal Assignment 1 Due</td>
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<td>Sept 24</td>
<td>Class 4 – Journal Assignment 2 Due</td>
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<tr>
<td>Oct 1</td>
<td>Class 5 – Journal Assignment 3 Due</td>
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<tr>
<td><strong>Monday, Oct 7 by noon</strong></td>
<td>Team Abstract Due</td>
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<tr>
<td>Oct 8</td>
<td>Class 6 – Journal Assignment 4 Due</td>
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<td></td>
<td>Midterm Distributed</td>
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<tr>
<td><strong>Fall Break October 14 – 15</strong></td>
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<tr>
<td><strong>Friday, Oct 18 by noon</strong></td>
<td>Midterm Due</td>
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<tr>
<td>Oct 22</td>
<td>Class 7 – Journal Assignment 5 Due</td>
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<td>Oct 29</td>
<td>Class 8 – Journal Assignments 6 and 7</td>
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<tr>
<td></td>
<td>Due</td>
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<tr>
<td>Nov 5</td>
<td>Class 9 – Journal Assignment 8 Due</td>
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<td>Nov 12</td>
<td>Class 10</td>
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<td>Nov 19</td>
<td>Class 11 – Journal Assignment 9 Due</td>
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<td><strong>Extra Thanksgiving Day November 26</strong></td>
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<tr>
<td>Dec 3</td>
<td>Class 12 – Journal Assignments 10 and 11</td>
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<td></td>
<td>Due</td>
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<tr>
<td>Dec 10</td>
<td>Class 14 – Team Presentations</td>
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<td><strong>Monday, Dec 16 by noon</strong></td>
<td>Team Paper Due</td>
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## Journal Assignments

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<tr>
<th>#</th>
<th>Title</th>
<th>Question</th>
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<tbody>
<tr>
<td>1</td>
<td>Creating Organizational Unity around Performance Measures</td>
<td>While <em>Year Up</em> has a common outcome that the organization strives to achieve, each unit works towards and is measured by specific outputs. How do you gain agreement across the organization and attain unity around the ultimate outcome?</td>
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<td>2</td>
<td>BRC Quarterly Performance Review Meeting</td>
<td>What are some of your reflections on the BRC Quarterly Performance Review Meeting from a performance management perspective?</td>
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<td>3</td>
<td>Implementing Real-Time Data Collection</td>
<td>Getting New Yorkers to care for trees is the next step. How can <em>Million Trees NYC</em> use performance data to gain ongoing public support?</td>
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<td>4</td>
<td>NYC HOPE Count: Using Data to Inspire Change</td>
<td>How can and should the NYC Department of Homeless Services use the annual HOPE count data? And how can and should the nonprofit providers contracted by DHS use it?</td>
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<td>5</td>
<td>How to Effectively Communicate Data</td>
<td>Reformat any one of the (quantitative) exhibits from any of the cases in the course packet to present the data more effectively. Why is your presentation more effective?</td>
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<td>6</td>
<td>Performance Measurement and Management in Humanitarian Relief</td>
<td>How does one instill a data-driven culture in humanitarian relief given the chaotic and urgent nature of the work?</td>
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<td>7</td>
<td>Robin Hood: Driving Mission through Relentless Monetization</td>
<td>Discuss the pros and cons of relentless monetization.</td>
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<td>8</td>
<td>Collective Impact</td>
<td>How does an individual organization measure its success within a broader collective impact effort?</td>
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<td>9</td>
<td>From Compliance to Measuring Quality</td>
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<td>10</td>
<td>Jeff Tryens and the Oregon Progress Board</td>
<td>Speaking of his position as Executive Director of the Oregon Progress Board, Jeff Tryens says, “I could only succeed because if this effort failed, it wasn’t my fault; it was the fault of the people who got us into this fix. But if I succeeded…I’m the hero!” Do you agree?</td>
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<td>11</td>
<td>Social Impact Bonds</td>
<td>Are Social Impact Bonds (SIBs) the “flavor of the month” (i.e., just another fad) OR a sustainable, scalable approach? In other words, are SIBs here to stay? Why or why not?</td>
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Detailed Course Schedule and Assignments

1. **Introduction**  (September 3rd)
   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. In addition, there will be a lecture/discussion about how to read, analyze and discuss cases.
   
   - Book: Hatry Chapter 1

2. **Performance Measurement, Logic Models, and Nonprofit Strategy**  (September 10th)
   This class will center on the alignment of performance measurement and management with an organization’s mission and strategy as well as understanding and developing logic models. The Team Project will be distributed and discussed.

   - Book: Hatry Chapter 2 and 5
   - Teams will be assigned this class.

3. **The Development Process**  (September 17th)
   This class will cover audiences for and uses of performance measures, the process of developing performance measures and key types of performance measures.

   - Book: Hatry Chapter 3
   - Journal Assignment 1 due.
4. **Performance-Based Contracting** (September 24th)
This class will highlight the challenges associated with developing and implementing an equitable and results-oriented performance-based contracting methodology.

- Book: Hatry Chapter 12
- **Journal Assignment 2 due.**

5. **Outcomes and Indicators** (October 1st)
This class will cover selecting outcomes and indicators that flow from and support the organization’s mission, strategy, and operating plan.

- Book: Hatry Chapters 4 and 6
- **Journal Assignment 3 Due.**

***TEAM ABSTRACT DUE Monday, October 7th by noon***
6. **Outcomes from a Healthcare Perspective**  (October 8th)
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.

- Book: Hatry Chapters 10
- **Journal Assignment 4 Due.**
- **Midterm distributed.**

***MIDTERM DUE Friday, October 18th by noon***

7. **Measuring Performance for Operational Efficiency**  (October 22nd)
This class will focus on the development of a technology platform that supports performance measurement and management, and operations across an international federation of organizations.

- Book: Hatry Chapter 11
- **Journal Assignment 5 Due.**
8. Performance Measurement from a Funder’s Perspective  (October 29th)
This class will focus on how funders decide which programs and initiatives to support with a particular emphasis on measuring impact.

- Journal Assignments 6 and 7 Due.

9. Using Technology: From Logic Models to Dashboards  (November 5th)
This class will focus on the development of technology-based dashboards that support performance measurement and management.

  *Can be accessed using your NYU Login at [https://getit.library.nyu.edu/go/8060178](https://getit.library.nyu.edu/go/8060178) and following the Online Access links.*
- NYU Classes:: City of Augusta, GA Dashboard iDashboard Example
- NYU Classes: University of Hawaii Community College System iDashboards Example
- Journal Assignment 8 Due.
10. **Agency-Wide Indicator, Reporting and Accountability Systems** (November 12th)

This class will explore how an agency-wide focus on selected outcomes has the potential of dramatic results, while at the same time raising serious questions and concerns.

- **Book:** Hatry Chapters 8 and 14

11. **Benchmarking to Achieve Social Goals** (November 19th)

This class will enable students to understand benchmarking, its application and its ability to achieve social goals, particularly in a political context.

- **Book:** Hatry Chapter 9
- **Journal Assignment 9 Due.**
12. **Leadership in Performance Management and Social Impact Bonds** (December 3rd)
   This class will focus on effective performance management and leadership strategies. It will also examine social impact bonds.
   
   - **Journal Assignments 10 and 11 Due.**

13. **Team Project Presentations** (December 10th)
   Each team will present its project which will be followed by a class discussion and critique.

   ***TEAM PAPER DUE Monday, December 16th by noon***