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, funding, transparency and accountability for public, non-profit and healthcare organizations. It will not only cover how logic models and accompanying measures are used to connect the mission and strategies of an organization to daily operations, but also how to implement a performance management system to achieve desired organizational outputs and outcomes. In addition, the course will highlight the need for leadership and management acumen to ensure success in achieving meaningful, significant and sustainable 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 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/)
    (please note: a hard copy of this book will be provided at the first class)

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**Course Requirements & Grading**

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 (20%)** – Students will complete 8 of the 10 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 (35%)** – The Team Project will consist of three elements:
  - 2 to 3 page abstract outlining your project (5%),
  - Presentation to the class on your 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 27</td>
<td>Introduction</td>
<td></td>
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<tr>
<td>2 February 3</td>
<td>Performance Measurement, Logic Models, and Nonprofit Strategy</td>
<td>Journal Assignment 1 Due Teams Assigned/ Project Distributed</td>
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<tr>
<td>3 February 10</td>
<td>The Development Process</td>
<td>Journal Assignment 2 Due</td>
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<tr>
<td>4 February 17</td>
<td>Outcomes and Indicators</td>
<td>Journal Assignment 3 Due</td>
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<tr>
<td>5 February 24</td>
<td>Building and Using Dashboards for Organizational Improvement</td>
<td>Journal Assignment 4 Due</td>
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<tr>
<td><strong>Sunday, February 28 by 5:00</strong></td>
<td><strong>Team Abstract Due</strong></td>
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<tr>
<td>6 March 2</td>
<td>Measuring Performance for Operational Efficiency</td>
<td>Journal Assignment 5 Due</td>
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<tr>
<td>7 March 9</td>
<td>PMM from a Funder’s Perspective: Government</td>
<td>Journal Assignment 6 Due</td>
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<tr>
<td><strong>Spring Recess March 16</strong></td>
<td><strong>Midterm Distributed</strong></td>
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<tr>
<td>8 March 23</td>
<td>PMM from a Funder’s Perspective: Foundations and Investors</td>
<td>Journal Assignment 7 Due Midterm Distributed</td>
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<tr>
<td>9 March 30</td>
<td>PMM from a Healthcare Perspective</td>
<td>No Assignment</td>
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<tr>
<td><strong>Friday, March 31 by 5:00</strong></td>
<td><strong>Mid-term Due</strong></td>
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<tr>
<td>10 April 6</td>
<td>Agency-Wide Indicator, Reporting and Accountability Systems</td>
<td>Journal Assignment 8 Due</td>
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<tr>
<td>11 April 13</td>
<td>Benchmarking to Achieve Social Goals</td>
<td>Journal Assignment 9 Due</td>
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<tr>
<td>12 April 20</td>
<td>Leadership in PMM</td>
<td>Journal Assignment 10 Due</td>
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<td>13 April 27</td>
<td>Team Project Presentations</td>
<td>Class 13 – Team Presentations</td>
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<tr>
<td>14 May 4</td>
<td>Team Project Presentations</td>
<td>Class 14 – Team Presentations</td>
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<tr>
<td><strong>Friday, May 9 by 5:00</strong></td>
<td><strong>Team Paper Due</strong></td>
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<td>#</td>
<td>Title</td>
<td>Question to address</td>
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<tr>
<td>1</td>
<td>Why Performance Management?</td>
<td>Based on the comments of government and nonprofit leaders why is performance management necessary?</td>
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<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>
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<td>3</td>
<td>Developing a Performance Measurement System</td>
<td>Children's Aid Society was in the formative stages of developing its PMM system when this video was filmed. Describe the process Children’s Aid Society undertook to link measurement to mission across its wide range of services.</td>
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<td>4</td>
<td>Creating Organizational Unity on Performance Measures</td>
<td>While Year Up has a common outcome that the organization strives to achieve, each unit works towards and is measured by specific outputs. What were the challenges of aligning the performance measures of the Admissions Department with rest of the organization?</td>
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<td>5</td>
<td>Effective Data Visualization</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>PMM 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>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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<td>8</td>
<td>Homelessness and Data</td>
<td>Watch the video and take a look at the NYC Department of Homelessness Services (DHS) recently published statistics: How does the HOPE count relate to the online published data, and how can and should the nonprofit providers contracted by DHS use this data?</td>
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<td>9</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? What do you like or not like about Muzzy Rosenblatt’s management in the meeting?</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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Detailed Course Schedule and Readings

Class 1 | January 27 | Introduction
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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.

- Book: Hatry Chapter 1
- Book: Marino Introduction, Chapter 1 and 2

Class 2 | February 3 | Performance Measurement, Logic Models, and Nonprofit Strategy
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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
- Book: Hunter pp. 25-50

**Journal Assignment 1 due – Why Performance Management?**

Teams will be assigned this class.
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 2 due – Logic Model

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 – Developing a Performance Measurement System
This class will focus on the development of technology-based dashboards that support performance measurement and management.

- Book: Hatry Chapter 11
- NYU Classes: City of Augusta, GA Dashboard iDashboard Example
- NYU Classes: University of Hawaii Community College System iDashboards Example

Journal Assignment 4 due – Creating Organizational Unity on Performance Measures

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.

- NYU Classes: Video: Performance Measurement and Management in Humanitarian Relief.

Journal Assignment 5 due – Effective Data Visualization
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 6 due – PMM in Humanitarian Relief
This class will focus on how funders and investors decide which programs and initiatives to support with a particular emphasis on measuring impact.

- NYU Classes: Video: Robin Hood: Driving Mission through Relentless Monetization.

Journal Assignment 7 due – Social Impact Bonds

***TEAM ABSTRACT DUE Monday, by noon***
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

No Journal Assignment due!

***MIDTERM DUE Friday April 1, by 5:00***
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

Journal Assignment 8 due – Homelessness and Data

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 – BRC Quarterly Performance Review Meeting
This class will focus on effective performance management and leadership strategies.

- Book: Morino Chapters 3-4

*Journal Assignment 10 due - Jeff Tryens and the Oregon Progress Board*

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**Class 13**  **April 27**  **Team Project Presentations**

Each team will present its project which will be followed by a class discussion and critique.

**Class 14**  **May 4**  **Team Project Presentations**

Each team will present its project which will be followed by a class discussion and critique.

***TEAM PAPER DUE Monday May 9, by 5:00***