

**PAD 656: Capstone Seminar in Nonprofit
Leadership and Management Practice (4 credit hours)**

**Syllabus
Spring Semester 2007**

Thursdays 6:00 p.m. - 9:50 p.m.
Maxine Goodman Levin College of Urban Affairs
Glickman Miller Hall
Dean's Office Conference Room

Instructors: Stuart C. Mendel; Steven A. Minter.

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Office hours: 5 p.m. Thursdays and flexible by appointment

Prerequisites: PAD 550 and either PAD 651 or PAD 652, or instructor permission

Introduction

This seminar considers key aspects of leadership and management in the nonprofit sector as they are applied in practice. It aims to integrate significant theory and research results with practical skills and personal introspection by the student. This course is intended as a capstone experience for students pursuing the graduate certificate in nonprofit management and/or the MPA nonprofit specialization. Therefore, it is best taken as close to the end of the student's coursework as possible. It is intended to aid the student in understanding the working environment in the nonprofit sector and to offer lessons on "good management" practice.

The approach of the course is to engage students in discussions and exercises that explore the relationship between theories and practices of nonprofit leadership and management. The relationship between theory and practice in professional education has a long history in which the two are seen as being in tension with each other. Practitioners tend to see theories of leadership and management as irrelevant to the task of diagnosing and solving organizational problems; at the same time, theorists and researchers tend to see practical skills as lacking the rigor and sophistication that characterize "real" knowledge. This course aims to move beyond this impasse by providing a range of opportunities for students to figure out for themselves just how relevant and helpful existing theories are. At the same time, we will explore how practices may already be grounded in implied theories that, if made explicit, can be weighed and consciously chosen or rejected.

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Much of our time in class will be devoted to discussions and to exercises, especially working through complex case situations. We will treat case situations as opportunities to diagnose problems and to select meaningful ways of addressing them. We will focus especially on top-level leadership and management (and the possible differences between them). This will necessitate consideration of the tension between internal and external factors, since much of the complexity of leadership and management stems from having to balance the two. Therefore, we will not only consider elements such as the management of human, fiscal, and technological resources but also the organization's political and economic environment. By and large, the focus will be on issues encountered in leading and managing small to mid-size community- and faith-based organizations.

The overall goal of the course is to provide a framework within which members of the class can actually practice leadership and management skills in as realistic and practical a way as is possible within the confines of a class situation. Topical components of the Capstone course have been divided into three themes, which are not mutually exclusive and may comprise elements of each class throughout the semester.

- I:** Projecting outward: understanding the context in which the organization operates;
- II:** Projecting inward: creating an effective organization: by recognizing the needs of the organization and putting those pieces in place;
- III:** Practical applications: Applied management principles in nonprofit organizations.

To accomplish these three themes, individual class sessions may have as many as four components consisting of lecture, guest expert, case study scenario and practical application exercises.

By the end of the course, students should:

- Understand the nature of leadership and management and the differences between them;
- Understand the factors with which nonprofit leaders and managers have to cope;
- Be able to analyze complex case situations and suggest plausible ways of dealing with them;
- Perceive an improvement in their personal leadership and management skills.

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Grading and Evaluation Criteria

*Students are expected to complete readings and written assignments on time as noted in the syllabus. **There are no exceptions to this rule, and the responsibility to meet course standards falls upon the student alone.*** As this is a graduate level applied management course, it is the responsibility of the student to ask questions and when necessary, to perform additional learnings outside class, should it be necessary for them to understand topics covered in during class-time.

Attendance is an important part of course grading. Students will be evaluated and receive grades based upon the demonstrated knowledge gained through in-class discussion, as well as participation and completion of weekly in-class assignments and simulation exercises. Hence, *prompt* attendance during the semester is essential as well as completion of preparatory readings for each course meeting. Consistently late arrivals or missed classes will result in a lower final grade for students.

Up to 10 written assignments will constitute the course grading. Some of these projects will require the work of a group, while others will be completed individually. Unless directed otherwise, written assignments will take the form of memoranda from students to course instructors, and serve as briefings for a semester long dossier of materials. Both instructors will submit grades for each assignment, and students must turn in two copies of each assignment. Students may be asked to present materials to the class as part of their written projects. Written assignments assigned for work outside of class will be due at the start of class the following week. *Late papers will not be accepted unless approved in advance by one or both of the instructors.* **Students are expected to complete the weekly assigned readings in advance of the class in which they are posted on the syllabus** in order to ensure maximum student participation in the seminar format. **You will be given a binder with a number of the articles already copied.** They are marked with ***. Ten percent of the final earned course grade will be earned through class participation and attendance.

Required Texts:

- Edwards, Richard L., Yankey, John A. and Altpeter, Mary A. 1998. *Skills for Effective Management of Nonprofit Organizations*. Washington D.C.: NASW Press.
- Lencioni, Patrick M. 2002. *The Five Dysfunctions of a Team: A Leadership Fable*. San Francisco: Jossey-Bass.
- Lencioni, Patrick M. 2000. *The Four Obsessions of an Extraordinary Executive: A Leadership Fable*. San Francisco: Jossey-Bass.

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Class Schedule:

Jan. 18 Course Introduction

Lecture Topics: Class introductions, course administration, goals of course, expectations of students and review of syllabus. Students receive the “memo” template for completing written assignments. Class will discuss the notion of “strategy” with respect to understanding and mapping the ecology of games for nonprofit organizations. In addition, we will examine several ways to “frame” issues, recognize and respond to incentives and position an organization as a player.

Students will perform a self-assessment profile and our guest presenter, Susan Freimark, Program Manager, Center for Nonprofit Policy and Practice will lead our examination of the **Learning Style Inventory**.

Readings:

In class case studies involved with strategy.

- McKnight Foundation Approach
- Mintzberg, Crafting Strategy, Harvard Business Review, 1987 ***
- Beinhocker, Origin of Strategies, The McKinsey Quarterly, 1999 ***

Written assignment 1: **Two part written assignment**. Part 1 will provide a briefing in the form of a memorandum on each student’s professional interests, goals, and a self-description of where they are in their career ladder. They will also submit a resume or CV as an attachment to the memo.

Part two of the memorandum will consist of a report requiring students to assess their experience and past learning regarding the distinctive characteristics of nonprofits and the third sector. Once again, the primary means of conveying this information will be in the form of a memo that will serve as a template for future assignments and provide a benchmark for instructors and students to assess prior learning. We will work through an in-class example. **This is a graded assignment due at the start of class on Jan 25.**

Jan. 25 Establishing Context for nonprofit organizations

Lecture Topics: Often referred to in the nonprofit literature as the “environmental scan,” the context in which a particular nonprofit operates can easily be overlooked or misinterpreted. Collecting information and performing effective analysis of the environment in which a nonprofit operates is essential to understanding a nonprofit and its ability to form partnerships and get things done. **Source material will consist of selected annual reports to be distributed in class.**

Readings:

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- “Managing Effectively in an Environment of Competing Values” by Edwards, Austin and Altpeter, Chapter 1 in Edwards, Yankey, and Altpeter, *Skills for Effective Management of Nonprofit Organizations*, pp. 5 - 26.
- Bothwell, Robert O., “Philanthropy and Democracy” book review of Roelofs, Joan, *Foundations and Public Policy, the Mask of Pluralism* in Nonprofit Management and Leadership, Vol. 15, Issue 1, Fall 2004, pp. 139 - 144.***
- Bush, Richard. “Fundraising and Strategic Focus” book review of Mal Warwick, *Five Strategies for Success: A Mission-Based Guide to Achieving your Goals*, in Nonprofit Management and Leadership, Vol. 13, Issue 3, Spring 2003, pp. 289 - 290.***
- Krug, Kersti; Weinberg, Charles B. “Mission, Money, and Merit: Strategic Decision Making by Nonprofit Managers” in Nonprofit Management and Leadership, Vol. 14, Issue 3, Spring 2004***
- Reisch, Michael; Sommerfeld, David. “Welfare Reform and the Future of Nonprofit Organizations” in Nonprofit Management and Leadership, Vol. 14, Issue 1, Fall 2003, pp. 19 - 46.***
- Lune, Howard. “Weathering the Storm: Nonprofit Organization Survival Strategies in a Hostile Climate.” Nonprofit and Voluntary Sector Quarterly, vol. 31, no. 4, December 2002, pp. 463 - 483.***
- Mendel, Stuart C. “The Ecology of Games between Public Policy and Private Action: Nonprofit Community Organizations as Bridging and Mediating Institutions,” in Nonprofit Management and Leadership, Vol. 13, Issue 3, Spring 2003, pp.229-236.***

Written assignment 2: **Two part written assignment**

Part 1: Using literature provided (annual report information provided during the class), student groups will submit a memo commenting on the annual report information based upon classroom instruction and examples.

Part 2: Students will then sketch a plan pulling together the readings and the “environmental scan” that they obtain through their own research to position a theoretical nonprofit to succeed in responding to the conditions noted. **This is a graded assignment due at the start of class on February 1.**

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Feb. 1 Decision-making

Lecture Topics: Decision making is both an art and science whose application may be reflected in different ways depending on an organization's long and short term circumstances and the vision and personality of its leadership. Beginning with the premise that leadership, decision-making and learning are indispensable to each other, students will work through a template in which to apply case study scenarios to test out ideas related to leadership, strategy and the framing of issues. **Students must bring the annual report materials distributed at the January 25 class session.**

Readings:

- "Planning and Managing Strategically," by Eadie, Chapter 21 in Edwards, Richard L., Yankey, John A. and Altpeter, Mary A. 1998. *Skills for Effective Management of Nonprofit Organizations* pp. 453 - 468.
- Marx, Jerry D. "Corporate Philanthropy: What is the Strategy?" Nonprofit and Voluntary Sector Quarterly, vol. 28, no. 2, June 1999, pp. 185 - 198.***
- Lane, Frederick S. "Book Review." Nonprofit and Voluntary Sector Quarterly, vol. 33, no. 2, June 2004, pp. 355 - 358.***
- Drucker, "What Makes an Effective Executive" Harvard Business Review, 2002***

Written assignment 3: Using an organization from the annual report distributed in class, predict the challenges facing the organization, and suggest action steps for the organization leaders. What can you conclude about the skills required of the Executive Director from your assessment? **This is a graded assignment due at the start of class on Feb 8.**

Feb. 8 Managing public policy and advocacy

Lecture Topics: In addition to providing contract services to supplement and compliment the work of government in American society, nonprofits have a vital responsibility to advocate for individuals to and with government. This takes place at the local, state and federal levels and can be quite helpful to government as a mechanism of evaluation. It can take the form of collegial meetings and briefings, or can be more confrontational, strident and vocal. On the other hand, feeding information back to public and private decision makers may be awkward for an organization with a major funding line arising from government.

As a result, systems for feeding back information can be direct and indirect, open to scrutiny or performed in private. In any case, care and strategy are important to nonprofits in pursuing the work of advocacy. Guest speaker this week will be Lori McClung, Associate Director and Senior Fellow, Center for Community Solutions. Ms. McClung will share her experiences in public policy making and provide a current case example for scrutiny by the class: **the Ohio Early Care and Education Campaign.**

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Readings:

- “Managing Public Policy Advocacy and Government Relations,” by Pelon and Baznik, Chapter 7 in Edwards, Richard L., Yankey, John A. and Altpeter, Mary A. 1998. *Skills for Effective Management of Nonprofit Organizations*, pp. 115 - 149.
- Netting, F. Ellen, “Community Organizing and Managing” book review of Hardina, Donna, *Analytical Skills for Community Organizing Practice*, Nonprofit Management and Leadership, Vol. 14, Issue 3, Spring 2004, pp. 359 - 360. ***
- Meyer, Megan and Hyde, Cheryl. “Too Much of a Good Thing? Insular Neighborhood Associations, Nonreciprocal Civility and the Promotion of Civic Health.” Nonprofit and Voluntary Sector Quarterly, Supplement to vol. 33, no. 3, September 2004, pp. 77s - 96s.***
- Graddy, Elizabeth and Morgan, Donald, “Community Foundations, Organizational Strategy, and Public Policy.” Nonprofit and Voluntary Sector Quarterly, Volume 35, no. 4, December 2006, pp 588-631***
- Scott, Deschenes, Hopkins, Newman, and McLaughlin, “Advocacy Organizations and the Field of Youth Services: Ongoing Efforts to Restructure a Field.” Nonprofit and Voluntary Sector Quarterly, Volume 35, no. 4, December 2006, pp 691-715***

Written assignment 4: A graded assignment using the organizations selected in class. Students will assess the advocacy capacity of their organization by describing what they do that meets our definition of advocacy. Examples of organizations to consider: Center for Community Solutions, Center for Health Affairs, Children’s Defense Fund (Ohio), Community Partnership for Arts and Culture, Cleveland Neighborhood Development Center, May Dugan Center. **This is a graded group assignment due at the start of class on February 15.**

Feb. 15 Team building

Lecture: Matching the right individuals to the right work, developing skills and maintaining enthusiasm of workers to the tasks of the organization and mission. Case study of Lencioni’s fable: 5 Dysfunctions of Building a Team.

Readings:

- “Designing and Sustaining Meaningful Organizational Teams,” by Bailey in Chapter 9 Edwards, Richard L., Yankey, John A. and Altpeter, Mary A. 1998. *Skills for Effective Management of Nonprofit Organizations*, pp. 185 - 199.
- Argyris, Chris, “Interpersonal Barriers to Decision Making” in *Harvard Business Review on Decision Making*, Cambridge: Harvard Business School Press, 2001 pp. 59 – 95.***

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- Lencioni, Patrick. **5 Dysfunctions of Building a Team** (*Read all chapters and bring book to class for discussion*).

Written assignment 5: What were the key elements/actions found in the case study that led to the outcome as told in “The March” (begins on page 182)? **This is a graded assignment due at the start of class on February 22.**

Feb. 22 Establishing trust (various readings from Russell Sage series)

Lecture Topics: Part I regarding emotional intelligence. Part II of lecture involves the effective functioning of a democratic society—including social, business, and political interactions—largely depends upon trust. Yet trust remains a fragile and elusive resource in many of the organizations that make up society’s building blocks. Is trust really essential to good governance, or are strong laws more important? What leads people either to trust or to distrust government, and what makes officials decide to be trustworthy? Can too much trust render the public vulnerable to government corruption, and if so, what safeguards are necessary? Explore how a sense of communal identity and shared values make citizens more likely to eschew their own self-interest and favor the government as a source of collective good. Why are regulatory institutions necessary to protect citizens from the worst effects of misplaced trust?

Readings:

- Van Slyke, David M. “Book Review.” Nonprofit and Voluntary Sector Quarterly, vol. 33, no. 2, June 2004, pp. 361 - 364.***
- Stolle, Dietland. "Clubs and Congregations: The Benefits of Joining an Association." Chapter 7 in **Trust in Society**, Karen S. Cook Editor, Russell Sage Foundation Series on Trust, New York: 2001. pp. 202 - 244.***
- Miller, Gary. "Why is Trust Necessary in Organizations? The Moral Hazard of Profit Maximization." Chapter 10 in **Trust in Society**, Karen S. Cook Editor, Russell Sage Foundation Series on Trust, New York: 2001. pp. 307 - 331.***
- Gibbons, Robert. "Trust in Social Structures: Hobbes and Coase Meet Repeated Games." Chapter 11 in **Trust in Society**, Karen S. Cook Editor, Russell Sage Foundation Series on Trust, New York: 2001. pp. 332 - 353.***
- **Case study from Cleveland Plain Dealer: “Fall from Grace.”** ***
- “Building Trust in the Workplace”, Amy Lyman, Great Place to Work Institute***

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Section II

**March 1 Governance - issues of the board of directors, establishing policies,
hiring and oversight of the chief executive**

Lecture Topics: Corporations aren't alone in focusing on governance; rigorous oversight of management and performance is increasingly important for nonprofits too. What must be done to make nonprofit boards more effective?

Readings:

- “Strengthening Board Performance” by Holland in Chapter 20, Edwards, Richard L., Yankey, John A. and Altpeter, Mary A. 1998. *Skills for Effective Management of Nonprofit Organizations*, pp. 425 - 452
- The **dynamic** nonprofit board, McKinsey Quarterly, October 19, 2004***
- Ihrke, Douglas M.; Johnson, Terri. “Is all Well in the Neighborhood? Conflict on Neighborhood Boards in Milwaukee. Nonprofit Management and Leadership, Vol. 14, Issue 4, Summer 2004, pp. 371 - 389.***
- McCambridge, Ruth. “Underestimating the Power of Nonprofit Governance.” Nonprofit and Voluntary Sector Quarterly, vol. 33, no. 2, June 2004, pp. 346 – 354***
- **Case Study: East Coast Orchestra’s Board of Trustees*****
- “The Clevelanders”, The New Yorker, February 7, 2005***

Written assignment 6: Using East Coast Orchestra case study as a reference prepare a memorandum about the governance of The Cleveland Orchestra and its strategic plan for sustainability. This will require additional research. **This is a graded assignment due at the start of class on March 8.**

March 8 Adapting to change, being a learning organization.

Lecture Topics: Organizations that are resilient, flexible and have the ability to adapt to changing circumstances tend to not only survive and thrive but also attract resources and talented individuals. The methods employed by these organizations can be subtle and based in “good practices” that are learned over time. This class will explore organizational characteristics that support “learning” behaviors and promote “adaptability” in nonprofit organizations. We will examine the concepts of “intended impact” and “theory of change.”

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Readings:

- Kearns, Kevin P. "Management-Capacity Building in the Pittsburgh Region," in Nonprofit Management and Leadership, Vol. 14, Issue 4, Summer 2004, pp. 437 - 452. ***
- Racine, David. "Dissolving Dualities: The Case for Commonsense Replication." Nonprofit and Voluntary Sector Quarterly, vol. 32, no. 2, June 2003. ***
- **Case Study: "Common Bonds", Stanford Social Innovation Review, Summer 2004** ***
- **Case Study: "Larkin Street Youth Services", The Bridgespan Group*****.
- **Case Study: "Harlem Children's Zone", The Bridgespan Group*****

Written assignment 7: To be determined based upon class discussion. **This is a graded assignment due at the beginning of class on March 22.**

March 15 No Class Spring Break

March 22 Characteristics of effective staffing

Lecture Topics: Working culture in nonprofits, professionalism, roles and expectations, professional development. Seeks to answer the questions, "Why do certain persons stand out from the pack?"; "How do you make organizations healthy?"

Readings:

- Akingbola, Kunle. "Staffing, Retention, and Government Funding: A Case Study" in Nonprofit Management and Leadership, Vol. 14, Issue 4, Summer 2004, pp. 453 - 465. ***
- Brown, William A.; Yoshioka, Carlton. "Mission Attachment and Satisfaction as Factors in Employee Retention" in Nonprofit Management and Leadership, Vol. 14, Issue 1, Fall 2003, pp. 5 - 18. ***
- Cohen, Lilly and Young, Dennis. 1989 *Careers for Dreamers and Doers; A Guide to Management Careers in the Nonprofit Sector*. Foundation Center (handout)
- Drucker, Peter F., "Managing Oneself", *Harvard Business Review*, January 2005. ***
- Lencioni, Patrick. *The Four Obsessions of an Extraordinary Executive*. (Read all chapters and bring book to class for discussion.)

Written assignment 8: Each student will interview a professional leader in the nonprofit sector and write a memorandum about that person and lessons learned using the template provided in the Cohen and Young reading. **This is a graded assignment due at the start of class on March 29.**

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Section III

March 29 Care and feeding of committees - definition and effective use of committees.

Special Presentation: Scott Simon, Vice President and Leasing Director, North Pointe Realty Inc. Mr. Simon currently heads a 95-person committee at the Jewish Community Federation that is preparing recommendations for a \$10 million effort to strengthen the Cleveland Jewish population under age 40.

Readings:

- “Silence=Bad Strategy”, Stanford Social Innovation Review.***
- Managing Magnificent Meetings, AGB Reports, January/February 2005.***

Written assignment: None

April 5 Succession in nonprofits - board, staff and volunteers

Lecture Topics: A challenge facing nonprofit organizations involves the ready availability of people with the knowledge, skills and seasoning to step into leadership positions

Readings:

- “Recruiting and Selecting Effective Employees,” by Pecora in Chapter 8, Edwards, Richard L., Yankey, John A. and Altpeter, Mary A.1998. *Skills for Effective Management of Nonprofit Organizations*, pp. 155 - 184.
- In-class handouts

Written assignment 9: Working in groups of 2 examine and assess case study organization charts handed out in class to gain insights into the hierarchies of management, logical successors and the implications for each. A graded assignment. Student to volunteer their CV for review by class.

April 12 Managing information, using technology and the development of systems to solve problems

Lecture Topics: Collecting and analyzing data through use of spreadsheets, databases, research and outsourcing, and performing a cost/benefit analysis. Exercises and scenarios intended to examine the potential, promise, possibilities and limits of technology in practical situations.

Readings:

- Brainard, Lori A., and Brinkerhoff, Jennifer M., “Lost in Cyberspace: Shedding Light on the Dark Matter of Grassroots Organizations.” Nonprofit and Voluntary Sector Quarterly, Supplement to Vol. 33, no. 3, September 2004, pp. 32S-53S.***

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- Saidel, Judith R., and Cour, Stephanie. "Technology and the Voluntary Sector Workplace." Nonprofit and Voluntary Sector Quarterly, vol. 32, no. 1, March 2003, pp. 5 - 24.***

Written assignment 10:

Part 1. Information/knowledge data base. A graded assignment.

Part 2. **In preparation for April 19, you are asked to submit a writing sample to Norm Friedman of Norm Friedman Communications *no later than April 16*. E-mail address is nfriedman@prodigy.net.**

**April 19 Communications and transmitting a message inside the organization
and outside the organization**

Lecture Topics: Norm Friedman of Norm Friedman Communications (tentative) will lead students in developing and practicing chief objectives in written communication. In a highly interactive format, this class will discuss keys to clarity, brevity, organization, and effective use of e-mail. His freelance articles have appeared in the *New York Times*, *Plain Dealer*, and other publications. The assignment for this session is not graded.

Readings:

E-mail Norm (nfriedman@prodigy.net) a writing sample (Microsoft Word attachment preferred) *no later than April 16*. Your sample should be a letter, memo, or e-mail, one to four paragraphs long. The sample can be real or contrived, business-related or personal.

April 26 Financial Management

Lecture Topics: Understanding the uses of overhead and the allocation of costs both as a management tool and as a window into the operations of the organization by outside interests. Examination of revenue and expense strategies, financial controls and budget building issues. Practical applications provided through budget building exercises, grants administration, and program budget scenarios. Examination of Form 990 and implications of Sarbanes Oxley legislation on nonprofits.

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Readings:

- “Understanding Nonprofit Financial Management,” by Strachan in Chapter 17 of Edwards, Yankey and Altpeter. 1998. *Skills for Effective Management of Nonprofit Organizations*, pp. 343 - 371.
- “Learning from Sarbanes-Oxley: A Checklist for Nonprofits and Foundations,” Independent Sector.***
- “The Sarbanes-Oxley Act and Implications for Nonprofit Organizations,” Independent Sector.***
- “Managing Fiscal Stress,” by Lane, Frederick S., Chapter 5 of **Wise Decision-Making In Uncertain Times**, Dennis Young, Editor, National Center on Nonprofit Enterprise, pp. 75-90.***
- Hughes, Patricia. “The Economics of Nonprofit Organizations” in *Nonprofit Management & Leadership*, vol. 16, no. 4, Summer 2006.

Written assignment 11: To be determined.

May 3 Evaluating Effectiveness/Special Topics

Lecture Topics: Creating measures to assess the successes and failures of the organization as both a management tool and to build credibility with constituents, funders, external partners. Is the issue of accountability important enough to warrant the added pressure and fiscal costs placed upon the nonprofit? **Guest speaker this week will be Judith Simpson, Director, Strategic Planning, Government Relations and Information Technology, United Way Services.**

Readings:

- “New Approaches to Program Evaluation,” by Meier and Usher in Chapter 18 of Edwards, Yankey and Altpeter. 1998. *Skills for Effective Management of Nonprofit Organizations*, pp. 371 - 405.
- Dart, Raymond. “Being Business-like in a Nonprofit Organization: A Grounded and Inductive Typology.” *Nonprofit and Voluntary Sector Quarterly*, vol. 33, no. 2, June 2004, pp. 290 - 310. ***
- Herman, Robert D; Renz, David O. “Theses on Nonprofit Organizational Effectiveness” in *Nonprofit and Voluntary Sector Quarterly*, vol. 28, no. 2, June 1999, pp. 107-126.***

Written assignment: none

May 10 Exam week