<u>FIELD STUDY OF NONPROFIT ORGANIZATIONS</u>

LBJ School of Public Affairs
RGK Center for Philanthropy & Community Service
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>> Subject to change and refinement <<

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Course Number: PA388L (PA)
Unique Number:
Meeting day & time:
Classroom:
Faculty Assistant:
e-reserves password: ***case***

Course Description and Objectives

Although every nonprofit organization may be unique, each is faced with similar issues that relate to its position in civil society and the common developmental issues of building capacity for sustainability, mission fulfillment, and success. This course provides opportunities for students to observe nonprofits in action by conducting fieldwork. Through interviews, reading and class discussion students will develop case studies on specific organizations and present nonprofit management issues through these narratives. Each case study will describe an organization and a critical management or policy issue. The cases developed in this class will be used by instructors as teaching aides designed for the analysis of nonprofit management issues.

In this course students will work in the field in teams to research selected nonprofit organizations and produce informative case studies illustrating typical dilemmas and challenges in the sector. In the exploration and writing of these cases, students will gain in depth knowledge of issues confronting nonprofit organizations. The fieldwork will focus on nonprofit that utilize volunteers strategically, and will address the following nonprofit issues:

1. Performance Measurement and Evaluation
2. Financing and Revenue Strategies
3. Communication and Media Relations
4. Managing Accountability and Building Legitimacy
5. Community Partners and Civic Engagement

The course is part of a trilateral collaboration between Canada, the United States and Mexico, titled "Developing Civil Society Education through Case Studies" program (DCSCS). Through this partnership, three universities are presenting courses in which students research and write case studies. Instructors are working closely with the University of Washington's Electronic Hallway (www.hallway.org), which is an online resource of case studies on public affairs and nonprofit issues. The Hallway also serves as a resource on the teaching and writing of teaching case studies related to public policy and nonprofit endeavors.

The objectives of this course are for students to increase their familiarity with management issues in civil society organizations, and to develop skills in describing and analyzing nonprofit management issues. Students will work individually and in teams to prepare case studies, focused literature reviews and teaching notes that are of strong analytic and descriptive quality and provide useful information and learning opportunities for students and practitioners alike.

Specific organizations have been pre-selected to serve as the foci for each teaching case. Students will be introduced to the organizations in week three of the class. Research teams will be organized following the nonprofit panel. Every effort will be made to facilitate a group assignment that meets the wishes of the students and achieves the expectations of the course.

Course Requirements

The major assignment for the course is to develop a case study and teaching notes for the case study. This expectation will help to develop skills in writing educational materials about the nonprofit sector. In addition, student teams will produce a review of literature about a given management challenge associated with the case/field study. Based on this information, student teams will develop a complete case and teaching notes, and lead a class using this material. Final cases and teaching notes will be submitted for use in the field. Students will share authorship credit for these cases with the course instructors.

Each student will participate in a team which will produce the literature review and a full case study of a selected management topic in an actual nonprofit organization by the end of the semester. This case study should follow the outlines presented in class and include both a case description and a set of teaching notes, connecting the case to a conceptual framework or publication, and presenting an outline for class discussion. Each student group will be expected to lead a class session utilizing one of the case studies he or she has produced.

Readings

Readings will be available on electronic reserve (E-Res). The password to access e-reserves is "case."

Case readings:

- Performance Measurement and Evaluation: TEAM READ (Electronic Hallway)
- Financing and Revenue Strategies: MAITRI AIDS (Kennedy School)
- Communication and Media Relations: FRONT STEPS (RGK)
- Managing Public and Nonprofit Relationships: CASA AMIGA (Electronic Hallway)
- Community Partners and Civic Engagement: GO VOLUNTEER PROBONO (RGK)
- Leadership and Governance: INTERSEX SOCIETY (Electronic Hallway)

Determination of Grade

Your grade will be determined as follows:

Literature Review	20%
Group Case Study & Teaching Notes	40%
Group Presentation	20%
Class Participation	20%

If you are an international student with a home university other than UT, and have specific grading issues, please discuss these concerns with the instructors within the first three days of the class.

Attendance and Participation

Absences mean that students do not benefit from class discussion; for all absences students must submit a written memo answering questions assigned by the instructor. Please let us know if you will be absent so that we can provide you with the questions. More than one *unexcused* absence will result in the drop of one letter grade for the course.

ANTICIPATED SCHEDULE AND ASSIGNMENTS

Class 1

What is the Nonprofit Sector?
What do we hope to accomplish this semester?
Overview of the course and expectations

Readings:

- Salamon, Lester (1996). *America's Nonprofit Sector: A Primer*, Chapter 2 What is the nonprofit sector and why do we have it?
- The Nonprofit Sector in Brief: Facts and Figures from the Nonprofit Almanac 2007. The Urban Institute.
- Frumkin, Peter (2002) *On Being Nonprofit*, Chapter 1 The idea of a nonprofit and voluntary sector.
- The role of the board of directors of a nonprofit organization (SJ to find)

Case: INTERSEX SOCIETY

Class 2

What is a nonprofit organization?
What kinds of management issues do nonprofit face?
What are common frameworks that practitioners and/or academics rely on to guide strategy?

Readings

- Oster, Sharon (1995). *Strategic Management for Nonprofit Organizations.* Chapter 2. The mission of the organization.
- Light, Paul (2004). The Spiral of Sustainable Excellence. *Nonprofit Quarterly.*
- Maryland Association of Nonprofits (2001). Standards of Excellence.

Case: CASA AMIGA

Class 3

What are the critical issues facing nonprofits?
How does the larger socio-political environment affect nonprofit organizations?

Readings: Working in research groups, students will bring to class articles that pertain to critical issues facing nonprofit organizations. Each student group will need to find articles or information from the sources noted: an article found on google scholar; an article from a nonprofit magazine read generally by practitioners (Nonprofit Times or Nonprofit Quarterly); an article from an academic journal (NSVQ or Nonprofit Management and Leadership); an article found in a general newspaper; an article from a trade publication such as the Chronicle of Philanthropy. Before students report on the critical issues facing nonprofits, the groups will meet to discuss the lessons learned from the literature search.

GUESTS: Nonprofit Panel: What keeps you up at night?

The executive directors in this panel will each represent an organization that will be the subject of one of the case studies. At the conclusion of the panel, the students will submit case study team choices to the instructors.

Class 4

How do nonprofits measure success?
How will your work team measure success?
What are the characteristics of good team initiatives?

Readings:

- *Handbook of Practical Program Evaluation*: Part One; Chapter 1, Using Logic Models (McLaughlin and Jordan); Chapter 2, Evaluability Assessment (Wholey).
- Wheatley, Margaret and Kellner-Rogers, Myron (1998). *Nonprofit Quarterly*. What do we measure and why? Questions about the uses of measurement.
- *Nonprofit Quarterly* (1998). How has evaluation really worked in your organization?
- http://www.ccfbest.org/outcomemeasurements/tentipsfordeveloping.htm

Case: TEAM READ

Instructors provide students with case study team assignments.

Class 5

What is the competitive advantage of using volunteers?
How do executive directors view volunteers and the infrastructure associated with volunteer involvement?
Do volunteers actually do good?? Be prepared to defend your response to this question.
What are characteristics of a good case study? What kinds of questions provoke thoughtful class discussion? What information is key to providing context for discussion?

Readings:
- Rehnborg, Bailey, Moore, & Sinatra, (2008). *The Executive Director's Guide to Maximizing Volunteer Engagement*, RGK Center for Philanthropy and Community Service.
- Gerson, Michael J. (1997). Do do-gooders do much good? First appeared in *U.S. News and World Report*, April, 1997.
- Urban Institute Volunteer Management Capacity Study

Case: GO VOLUNTEER PROBONO

All teams are to have researched their organizations and preferably had their first meeting with the executive director at this point in the semester.

Class 6

What function do case studies perform in the study of nonprofit organizations?
What are the hallmarks of an effective case?
How are cases developed?
What is the function of a conceptual framework for a case?
What's a quality literature review?

Guest Speaker to be invited

Readings:
- Electronic Hallway (1999). Welcome to the Case Method. Adapted from *What is the Case Method? A Guide and Casebook* (1996). Foundation for Advanced Studies on International Development, Japan.
- Sladowski , Paula Speevak (2008). *Telling the Story A Case-Writing Handbook* Centre for Voluntary Sector Research and Development Carleton University
- Boehrer, John (2003). Case Discussion Planning Worksheet. Electronic Hallway.
- Creswell, John W. (2009). *Research Design*, Chapter 2, Review of the Literature.

Each team will provide a brief overview of their organization and some of the issues that emerged through their research and meetings with the organization.

Class 7

How do nonprofits communicate to their various stakeholders?
How do nonprofits work with others to achieve goals?

Readings:
- Tompkins, Jane (1990). Pedagogy of the Distressed. *College English* 52:6.
- Dolan, Robert J. (1997). *Note on Marketing Strategy,* Harvard Business School.
- Gray, Barbara. *Human Relations*. 38:10. Conditions Facilitating Interorganizational Collaboration.

Class 8

What are the financial realities of nonprofit organizations?
How do you read a basic nonprofit budget and balance sheet?
What are the various sources of income available to nonprofit organizations?

Readings:
To be determined

Other readings and information may be assigned.

Case: The Bankruptcy of the San Antonio Symphony: Background and Financial Statements (A) and (B)

LITERATURE REVIEWS DUE BY BEGINNING OF CLASS TIME

Spring Break

Class 9

BEGIN TEAM MEETINGS WITH INSTRUCTORS

Class 10

What are the elements of good written language?
When is a style manual used?
How do you edit your own writing?
Readings:
Conciseness: A Guide to Sentence-level Brevity. Talitha May (2009), LBJ School of Public Affairs
Meyers & Morrison: A Question of Professional Ethics. And Instructor's Manual – Pinal Version
APA Presentation and Guide, Dr. Kelli Peck Parrott, Texas A&M University.

Guest: Talitha May

Class 11

EACH TEAM PROVIDES A DRAFT – EACH TEAM CRITIQUES THE DRAFT OF A DIFFERENT TEAM

Class 12

What will make the story flow well and the dilemmas stand out?
How can you add some drama to your case?

What will be in your teaching notes?

Readings:

CASE: GOODBYE TO HAPPY HOUR

Following the discussion of the case, the class will examine and critique teaching cases used in the class and will analyze the construction of teaching notes as documents.

ROUGH DRAFT OF TEACHING CASES DUE FROM EACH GROUP

Class 13

Small group meetings with each work team

Class 14

Cases: GROUP A TEAM 1

GROUP A TEAM 2

Class 15

Cases: GROUP B TEAM 1

GROUP B TEAM 2

For Developing Your Case Study:

CONTRACTING FOR SUCCESS -

Planning a contracting meeting:

1. Describe your purpose and the goal of the project.
2. Explain the kinds of information you seek
3. Spell out how you will be working
4. Confirm the product you will deliver
5. Identify what support and involvement you need from the client
6. Clarify the time schedule
7. Reiterate the role - not a problem solver, but a problem sensor and a journalist
8. Provide opportunity for q and a
9. Thank them for their time and access
10. Send a follow up note restating your agreement.

From Peter Block – Consulting Contracting

"Good contracts require good faith and often accidental good fortune"

Preliminary Case Study Outline & Planning Notes

Due at the start of class on _________________. There will be no extensions given for this assignment.

Copies: *Please bring a copy for each member of your team and one copy for each of the instructors.* Please type your comments and limit the total length of this assignment to not more than 3 pages (preferably 2 pages).

Grading: This assignment will be graded on a check plus, check or check minus basis.

Instructions: We are presenting the outline elements in the order they will be seen in the finished product. You do not need to work on this in that sequence. Our goal is to remind you of the components of a case study and give you tools to organize your materials. Please address the elements listed below in your assignment. Put your name and case study organization on your assignment.

Hook
What information do readers need to become engaged in the case, meet the protagonists, and understand the primary dilemma? BRIEF IDEAS HERE.

Background
What contextual and institutional information do readers need to understand the story and do the analysis? FROM YOUR INFORMATION GATHERING THUS FAR – NOTE WHAT MISSING ITEMS YOU'LL WANT TO ADDRESS.

- Field issues/facts/definitions/history/trends
- Organizational mission/history/facts
- People
- Facts or other information pertinent to the management challenge/dilemma/decision/issue to be addressed

Situation
What are the additional details on the hook and the sequence of events? JOT DOWN IDEAS HERE TO HELP FRAME, SHAPE AND ORGANIZE THE STORY LINE

Dilemma
Find an ending question or statement that sets the stage for student discussion.
FOR EXAMPLE: What decision does the protagonist need to make?

Appendices
What other materials should be included to help students work the case?
FOR EXAMPLE: Budget, Bylaws, Organization fact sheet

Case Study: Project Completion Expectations

ALL Case studies with Teaching Notes are due on May _________ We will notify you of a drop of point for these materials following consultation with the Assistant Dean for Operations here at the LBJ School.

Each group is to provide a complete packet of ***paper documents*** that includes the following:

1. Final version of Case Study with all appendices and references. Please include a byline for the names of the group members as authors.

2. Final version of Teaching notes. This material should include copies of articles that are recommended for instructional purposes with full references for each of these articles.

3. Brief biographical sketch of each team member. This 'sketch' should include your name, your university and field of study, the degree that you are working on, as well as any existing degrees that you have earned to date. This is generally sufficient, unless of you have a distinction of some type that pertains directly to this case (former executive director of a similar organization for example).

4. A separate self-addressed business envelope for each member of your team for written feedback on your case and accompanying materials. (We will affix postage)

5. All background documents. Background documents include:

    a. Initial Literature Review and pdf. copies of key articles listed in the initial review
    b. First full draft of case study (as discussed with faculty on April XX). This includes the rough drafts with any comments from both professors with any comments.
    c. Draft of case as distributed to class for your teaching presentation.

6. A CD rom with word documents for each of the above as well as pdf. versions of your recommended readings.

You will ***not*** receive any of the above listed materials back. This information may be used in the final preparation of the case studies for the expectations associated with the Tri-lateral grant that has brought our Canadian and Mexican students to the University for this semester.