

North Park University - School of Business & Nonprofit Management

Nonprofit Strategic Management - SBNM 5790

2012 Fall Semester, Quad B (on-line)

2.0 credit hours

Prerequisites - all core courses for MNA or MHEA degree

Syllabus

Course Instructor: Gianfranco Farruggia, Ph.D., Assoc. Prof. of Nonprofit Management

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Office Location: SBNM; 5043 N. Spaulding, 2nd Flr.; Chicago, IL 60625

Office hours: My official office hours are: Mondays 12:00 to 3:00pm, Wednesdays 12:00 to 4:00pm. Due to various university committee activities, I am available often Monday through Friday and routinely check my e-mail box. On Saturdays I check early morning and late evening. On Sundays I check early morning and late afternoon [**all Chicago times**].

On-line hours: At the same times that I check my e-mail, I also check, read, and respond to postings; but my scheduled on-line times are Mondays & Wednesdays (9am-12noon & 7pm-10pm), Fri. (9am-1pm), and Sun. 7pm-10pm) [**all Chicago times**].

Assignment feedback/Posting grades: 1) posting of participation grades will be completed no later than the Monday (by 5pm) following the previous week's discussion, 2) posting of grades for various assignments will be completed no later than the Friday (by 5pm) following the submission date/time of a particular assignment [**all Chicago times**]. Should you need to converse/discuss issues with me at other times, please call my school office (773-244-5209) or e-mail me and we'll schedule a mutually agreed-upon appointment. If you experience some sort of **emergency**, call my school office, leave a message (it will also be sent as an e-mail message). Be aware that e-mails are also sent to my mobile-phone; therefore, emergencies are noticed quickly & I'll respond via phone or e-mail, as soon as possible.

Introductory Comments/Course Description:

It cannot be emphasized strongly enough the importance of strategic management in good corporate governance. In fact, it's believed that corporate governance should be an integral part of the strategy process. The Golden Rule of good corporate governance is that it requires an effective strategic management process to be in place.

By this it's meant that an organization is organized and run according to rules which

- set a goal which matches the duly considered expectations of the stakeholders*
- work out a feasible strategy to achieve that goal*
- put in place an organization which can carry out the strategy and attain the goal*
- set up a control and reporting function to permit management to drive the organization effectively and make necessary adjustments to the strategy or even the goal*

Anything less rigorous than the above strategic management definition will only achieve success by accident and will be vulnerable to all kinds of unexpected events. Good corporate governance is, or should not just be about compliance and risk management, but - more positively - good management.

*As Harvey MacKay said, "**Failures don't plan to fail; they fail to plan**" (based on an old military proverb) and Thomas Edison famously said "**Good fortune is what happens when opportunity meets with planning.**" Examine any successful organization and you will observe the high and disciplined level of planning which incontrovertibly led to that success - and the world is full of failures who failed to plan. Even many that have subsequently failed often did so because the importance of strategic management within the organization diminished and with it the essential structure and visibility required to achieve goals and avoid pitfalls.*

Course Description: This course deals with the overall general management of nonprofit organizations or institutions of higher education. The primary objective of the course is the development of a perspective of the executive leader's job and responsibilities from a conceptual as well as operating standpoint. Within this context, elements to be studied include: governance structure and issues, establishing and reinforcing the organization's mission and values, delineating an effective strategy, developing and using information flows to provide management control and performance and effectiveness evaluation, structuring the organization, and allocating human and financial resources. Ethical issues will be discussed throughout the course as pertaining to the nonprofit and higher education environments.

General Prerequisites: SBNM 5010, 5011, 5350, 5351, 5680, 5770, 5780

MNA Prerequisites: SBNM 5030, 5710, 5720, 5730, 5771

MHEA Prerequisites: SBNM 5740, 5741, 5742, 5745, 5746

Participant Learning Objectives: (Overarching IDEA Course Objectives)

1. Apply course material (to improve thinking, problem solving, and decisions).
2. Find and use resources for answering questions or solving problems.
3. Analyze and critically evaluate ideas, arguments, and points of view.

Specific Course Objectives:

1. Develop and construct a mission statement for a nonprofit organization or institution of higher education effected by contemporary social, economic and environmental issues.
2. Conduct analyses (applying prescribed strategic planning tools) and construct specific strategies appropriate to the environment of a nonprofit organization or institution of higher education.
3. Develop and construct a strategic plan for a nonprofit organization or institution of higher education that incorporates the McKinsey Capacity Grid, STEP analysis, SWOT analysis, Goals and Objectives, Strategies, Policies and Procedures, Rules and Regulations, Operation Plan, Budget, (based on Financial analysis) and Schedules.
4. Demonstrate through application (use of designated tools) gained knowledge of contemporary issues of organizational governance and management and their impact on strategic planning, formation and implementation.
5. Evaluate student-developed strategic plans by reviewing each plan and providing significant commentary (what appears to work, what challenges may need to be overcome and what may need improvement) on classmates' plans.

Schedule of Course Activities:

Course week: Starts on Monday, ends on Sunday at midnight

Assignment due dates/times: See Assignment Link for specific due dates & times for each assignment

Content release dates/times: Course materials are always available upon the opening of the course to all registered students

Instructor's on-line times: My scheduled on-line times are Mondays & Wednesdays (9am-12noon & 7pm-10pm), Friday (9am-1pm), and Sunday 7pm-10pm [all Chicago times].

Required Textbook (via the NPU bookstore): John M. Bryson, *Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement*. San Francisco, CA: Jossey-Bass. 2011, 4th ed. [ISBN: 978-0-470-39251-5] [e-book edition is available through external sources]

Additional Readings & Resources (all found on Moodle):

- 1) *KcKinsey Capacity Grid*
- 2) *Strategic Planning* by Pathfinder Intl.
- 3) *Best Practices for Strategic Planning* by Whatcom Council on Nonprofits
- 4) *Using Customer-Service Matrices in Strategic Analysis of Nonprofits* by Boardman & Vining
- 5) *Strategic Planning Handbook*
- 6) *Sample Strategic Plan*
- 7) *SMART Goals* by Meyer
- 8) *10 Keys to Successful Strategic Planning* by Mittenenthal
- 9) *How to Assess Nonprofit Financial Performance* by Keating & Frumkin
- 10) PowerPoint presentations by Farruggia

Course Teaching and Learning Methods: Because this course is being taught in intensive format, it is very important for students to keep up with readings, assignments and online discussions. Questions will be posted by the course instructor on the course site on a weekly basis to stimulate discussion. Responses need not only be directed to the course instructor but can and should be in response to the thoughts and ideas of other students as well. [Two or three students may be assigned each week to serve as discussion leaders. It will be the responsibility of these students to provide the opening “posting” to that week’s discussion question, to “manage” the discussion during the week, and to summarize key points at the end of that week.] Some assignments will be posted online for class member review and comments. The course instructor expects that each student will provide constructive and timely feedback to other class members on assignments as required. While the course instructor may also provide online feedback on assignments, grades for each course assignment are given privately.

Course Schedule: At the very latest, course materials will be made available by no later than Monday mornings at 8am (Chicago time). Expectation of students are:

- 1) All readings for the week should be complete by no later than Wednesdays at 9pm (Chicago time) to initiate our initial discussions (original postings) by no later than 10pm (Chicago time) on Wednesdays.

- 2) All response postings are due by no later than 36 hours after original postings.
- 3) All discussions will terminate on Sundays at midnight (Chicago time).

Computer Requirements: In order to effectively participate in and successfully complete this course, each course participant will need to have access to a computer and a high-speed internet connection. Please visit <http://www.northpark.edu/Current-Students/Computer-Services/Network/Minimum-Requirements.aspx> for information on computer requirements.

Technical Skills required: All students in an online course are required to take the online orientation to practice using on-line tools.

Student's Responsibilities:

1. Attendance, presence, and full participation are required for this class. You cannot successfully complete this course without completing the weekly readings and assignments. With respect to your identified organization, you are expected to: a) complete the McKinsey Capacity grid, b) conduct a Mission Critique, c) conduct a STEP analysis, d) conduct a SWOT analysis, e) construct a Strategic Plan.
2. Some assignments will be posted on-line for others to see. You will be asked to comment and provide feedback to one another on your work.
3. Although I strongly suggest that all issues, questions, and problems be dealt with online, you are free to call or e-mail me regarding issues & concerns at any time, noting the office hours I am available.
4. Use proper "netiquette" (see *A Guide to Netiquette* in Course Information resource).
5. I normally advise participants to plan on spending 10 to 12 hours per week on course responsibilities (i.e. reading, online discussion, assignments & analyses).

Instructor's Responsibilities:

1. Design the course and learning modules in such a way that students have every opportunity to achieve the learning objectives.
2. Provide reactions to students' discussions and responses as appropriate and needed in order to clarify important ideas and concepts.
3. Provide opportunities for any needed and appropriate group work that will include discussion as well as hands-on exercises.
4. Provide updated information on relevant resources for the various topics of interest.
5. Read and critically assess students' assignments and provide feedback within 3-5 days of receipt.
6. Respond to all student e-mails and phone messages within 48 hours of receipt.

Course Outline

Week 1 (Oct. 22, 2012; Strategic Management, Mission & Governance)

By completion of week 1, each student will have: 1) introduced oneself to professor and each student in class through the Introductions Forum; 2) engaged in weekly course flow through involvement in discussion forums; 3) described and defended how managers behave to maintain congruency between their organization and internal and external environments; 4) explored how managers go about making efforts to change and/or adapt to environments; 5) applied how the [McKinsey Capacity Grid](#) has made them aware of environmental components

(within one's chosen organization) that might need adjustment, adaptation, tweaking, or changing

Required Readings: PowerPoint presentations by Farruggia; Bryson, chs. 1-3; *Strategic Planning* by Pathfinder Intl.; *Best Practices for Strategic Planning* by Whatcom Council on Nonprofits

Assignments Due: Introductions (see on-line for deadline) & Forum Discussions

Week 2 (Oct. 29, 2012; Environmental Scanning)

By completion of week 2, each student will have: 1) explored the various external environmental factors (socio-cultural, technological, economic, politico-legal) to which organizations that comprise the nonprofit and higher education sectors need to attend; 2) described, synthesized, analyzed, and defended what impact these various external factors are having currently and what impact might they have in the foreseeable future; 3) completed a McKinsey Capacity Grid for their respective nonprofit organization or institution of higher education

Required Readings: PowerPoint presentations by Farruggia; Bryson, chs. 4+8; *McKinsey Capacity Grid*

Assignments Due: Forum Discussion & McKinsey Capacity Grid (see on-line for deadline)

Week 3 (Nov. 5, 2012; Choosing Strategy)

By completion of week 3, each student will have: 1) explored the various internal factors (organizational strengths/weaknesses, opportunities and environmental threats/challenges affecting internal operations) to which organizations that comprise the nonprofit and higher education sectors need to attend; 2) described, synthesized, analyzed, and defended what impact these identified factors might have in the foreseeable future; 3) completed a mission critique for their respective nonprofit organization or institution of higher education

Required Readings: PowerPoint presentations by Farruggia; Bryson, ch. 7

Assignments Due: Forum Discussions & Mission Critique (see on-line for deadline)

Week 4 (Nov. 12, 2012; Gaining Strategic "Advantage")

By completion of week 4, each student will have: 1) explored "strategic advantage" for a nonprofit organization, institution of higher education, and the sector in general; 2) described and defended their definitions of success in the arenas of nonprofit organizations and institutions of higher education; 3) described and defended the role of competition in the measurement of success; 4) described, synthesized, analyzed, and defended how one deals with differing (service recipients, board members, administration, line staff, funders, donors, general public) expectations of performance and how one attempts to resolve the potential conflicts that arise from these differing expectations; 5) completed a STEP analysis for their respective nonprofit organization or institution of higher education

Required Readings: PowerPoint presentations by Farruggia; Bryson, ch. 5; *Using Customer-Service Matrices in Strategic Analysis of Nonprofits* by Boardman & Vining

Assignments Due: Forum Discussions & STEP analysis (see on-line for deadline)

Week 5 (Nov. 26, 2012; Collaboration as Strategy)

By completion of week 5, each student will have: 1) explored the pros and cons of growth in the nonprofit and higher education sectors; 2) described and defended the value of partnerships within the sectors; 3) described and defended their argument for a differentiation strategy in the sectors; 4) described, synthesized, analyzed, and defended the pitfalls and benefits of nonprofit organizations or institutions of higher education emulating the business sector; 5) completed a SWOT analysis for their respective nonprofit organization or institution of higher education

Required Readings: PowerPoint presentations by Farruggia; Bryson, ch. 6

Assignments Due: Forum Discussions & SWOT analysis (see on-line for deadline)

Week 6 (Dec. 3, 2012; Implementing Strategy: Building Resource Capabilities, Structuring the Organization, Budgeting (based on Financial analysis), Policies, Best Practices, Support Systems & Rewards)

By completion of week 6, each student will have: 1) explored functional fit (doing the right thing) and administrative fit (doing the right thing in the right way) within the scope of their respective organization; 2) described, synthesized, analyzed, and defended how a board of directors (trustees) and organization's chief administrator (CEO/ED/President) fit into the implementation of strategy; 3) explored how an organization's leadership "fits" into the implementation of a strategic plan; 4) completed a Financial analysis for their respective nonprofit organization or institution of higher education; 5) described and defended how budgeting is "at the heart of implementation" and how budgets and financial analyses are control mechanisms; 6) described and defended what it means that policies and procedures are "the strength and curse of bureaucracy"

Required Readings: PowerPoint presentations by Farruggia; Bryson, chs. 9-12; *How to Assess Nonprofit Financial Performance* by Keating & Frumkin

Assignment Due: Forum Discussions & Financial analysis (see on-line for deadline)

Week 7 (Dec. 12, 2012; Developing & Implementing Strategy)

By completion of week 7, students will have: 1) completed and presented a fully developed Strategic Plan for their respective nonprofit organization or institution of higher education for classmates' review and commentary

Required Readings: *Strategic Planning Handbook*; *Sample Strategic Plan*; *SMART Goals* by Meyer; *10 Keys to Successful Strategic Planning* by Mittenenthal

Assignments Due: Strategic Plan Presentation & Completed Strategic Plan (see on-line for deadlines)

Assignments: A final grade for this course will be computed according to your successful completion of the following components: Student introductions & discussion forums will be held during weeks 1 through 6 and Strategic Plan reviews will be held during week 7, for which you will receive up to a maximum of **42** points for your participation in these forums.

Weekly Discussion Forum Schedule:

Week 1: Student introduction by no later than 1st Wednesday at 5pm; 1st Wednesday starting at 10pm, ending Sunday at midnight; response postings within 36 hours [all Chicago times].

Week 2: Wednesday starting at 10pm, ending Sunday at midnight; response postings within 36 hours [all Chicago times].

Week 3: Wednesday starting at 10pm, ending Sunday at midnight; response postings within 36 hours [all Chicago times].

Week 4: Wednesday starting at 10pm, ending Sunday at midnight; response postings within 36 hours [all Chicago times].

Week 5: Wednesday starting at 10pm, ending Sunday at midnight; response postings within 36 hours [all Chicago times].

Week 6: Wednesday starting at 10pm, ending Sunday at midnight; response postings within 36 hours [all Chicago times].

Week 7: Student upload of presentation by no later than last Thursday at midnight; Student commentaries on presentations ending last Sunday at midnight [all Chicago times].

Skill Building Assignments = 90 maximum points

- McKinsey Capacity Grid - 5 points possible (due by Sunday no later than midnight)
Instructions for completing this assignment can be found in week #1
- Mission Critique - 15 points possible (due by Sunday no later than midnight)
Instructions for completing this assignment can be found in week #2
- STEP Analysis - 15 points possible (due by Sunday no later than midnight)
Instructions for completing this assignment can be found in week #3
- SWOT Analysis - 15 points possible (due by Sunday no later than midnight)
Instructions for completing this assignment can be found in week #4
- Final Strategic Plan – 40 points possible (due by Monday no later than midnight)
Instructions for completing this assignment can be found in week #7

Be aware that late submissions of any assignment is accepted for good reason; a late submission will cost 10% of total assignment points for each day or portion thereof.

Use of APA Publication Manual: The School of Business and Nonprofit Management (SBNM) has adopted the *Publication Manual of the American Psychological Association* (APA) as the standard and required format for all written assignments in SBNM courses. Our goal in adopting the *APA Manual* is to enhance student learning by: 1) Improving student's writing skills, 2) Standardizing the required format of all written assignments in all SBNM courses, 3) Emphasizing the importance of paper mechanics, grammatical constructs, and the necessity of proper citations, 4) Holding students accountable for high quality written work. If you are unfamiliar with the requirements of the *APA Publication Manual*, we recommend that you purchase the reference manual and/or that you consult one or more of the suggested resources as listed on the Student Resources section of the SBNM website. ***It is your responsibility to learn and ensure that all written work is formatted according to the standards of the APA Manual.***

Grading: At the completion of this course, you will receive a letter grade reflecting your performance in this course. Letter grades will be awarded according to the existing policies of the School of Business and Nonprofit Management. The final course grade will be computed according to the total number of points earned for all assignments as shown below:

Total Percentage Earned: Final Grade:

100-95%	A
94-90%	A-
89-85%	B+
84-80%	B
79-75%	B-
74-70%	C+
69-65%	C
64-60%	C-
59% & below	F

Criteria for Grading Discussion Forum Participation: Your posts will be graded on a weekly basis according to the following criteria:

INITIAL POSTING RUBRIC -

Full Points	Half Points	Minimal Points	-0- Points
Discussion is substantive & relates to key principle(s), point(s) or issue(s) of the assignment	Reference made to key issue(s) but point(s) is(are) not sufficiently integrated	Inadequate or no reference to key principle(s); no evidence that student understood the principle(s)	No participation during the scheduled week
Uses relevant example(s)	Example(s) is(are) not integrated effectively into response	No example(s) provided	
Posted on time, see on-line for dates & times	Posted on time, but during the last 2 days of discussion	Not posted by deadline, see on-line for dates & times	No posting during the scheduled week
Syntax is appropriate, terminology used accurately and appropriately, language is understandable and concise, organization is logical	Terms used inaccurately; organization present but could be improved, writing is generally adequate but exhibits some lack of clarity	Writing is poor, terminology inaccurately used and lacks organization	

RESPONSE POSTING RUBRIC -

Full Points	Half Points	Minimal Points	-0- Points
Relates to the original posting; reinforces course material or challenges interpretation of material	Refers to lesson content but not integrated effectively	Does not refer to key points with no evidence student understands the key points	No responses during the scheduled week

Responds to the ideas presented in the original post	Response is loosely related to the ideas of the original post	Response does not relate to the original post	
Response is characterized by 3 or 4 of the following: a. supportive b. thought-provoking c. challenging d. reflective e. ties to another course concept	Response is characterized by 1 or 2 of the following: a. supportive b. thought-provoking c. challenging d. reflective e. ties to another course concept	Response is not: a. supportive b. thought-provoking c. challenging d. reflective e. ties to another course concept	
Posted on time, see on-line for dates & times	Posted on time, but during the last 2 days of discussion	Not posted by deadline, see on-line for dates & times	No response posting during the scheduled week
Organized, concise, clearly written in understandable language	Writing is adequate but may include inconsistencies or inaccuracies	Writing is poor, unclear and disorganized	

Academic Honesty: In keeping with our Christian heritage and commitment, North Park University is committed to the highest possible ethical and moral standards. Just as we will constantly strive to live up to these high standards, we expect our students to do the same. To that end, cheating of any sort will not be tolerated. Students who are discovered cheating are subject to discipline up to and including failure of a course and expulsion.

Our definition of cheating includes but is not limited to: 1) Plagiarism – the use of another’s work as one’s own without giving credit to the individual. This includes using materials from the internet; 2) Copying another’s answers on an examination; 3) Deliberately allowing another to copy one’s answers or work; 4) Signing an attendance roster for another who is not present.

In the special instance of group work, the instructor will make clear expectations with respect to individual vs. collaborative work. A violation of these expectations may be considered cheating as well. For further information on this subject you may refer to the Academic Dishonesty section of the University’s online catalog.

Support Services: Please see the Course Information resource for the Student Support content if you need assistance during your course.

Disabilities Accommodations: Students with disabilities who believe that they may need accommodations in this class are encouraged to contact the program's office: SBNM - (773) 244-6270. Please do so as soon as possible to better ensure that such accommodations are implemented in a timely manner. If needed, appointments can be relocated.