Course Syllabus: PUAD 527 Performance Measurement

Professor:
Dr. Adam Brewer

- Office: LAW #148
- Virtual Office (Zoom)
- Office Phone: (406) 243-4155
- Email: adam.brewer@umontana.edu
- Office Hours: Tuesday 3-4pm, Wednesday 3-4pm, Thursday 3-4pm (if remote, by appointment)

Communication with Professor:
The professor can be reached via email from 8am-6pm (M-F) for course inquiries. Please allow for up to 24 hours for a response. Unless an emergency, student email inquiries sent over the weekend, will be addressed on Mondays.

Course Calendar:

Week 1: Introduction: Defining the Concepts (Aug 26-31)

- Preparation:
  1. Attend Orientation Meeting via Zoom
  2. Read Van Dooren et al. Ch.1-2
  3. Read Behn Article, What Performance Management Is and is Not (On Moodle)
  4. Watch Mini-Lecture

- Due:
  1. Signed Grading Contract due Sat 11:59pm
  2. Beginning of semester survey due Sat 11:59pm

Week 2: History of PM (Sept 1-7)

- Preparation:
  1. Read Van Dooren at al. Ch. 3
  2. Watch Mini-Lecture

- Due:
  1. None

Week 3: The Costs and Benefits of PM (Sept 8-14)

- Preparation:
  1. Read De Bruijn Ch. 1-2
  2. Read Behn Article, Performance Deficits (On Moodle)
  3. Watch Mini-Lecture

- Due:
  1. Team Discussion: Initial posts due Wed 11:59pm. Reply posts due Sat 11:59pm
  2. PM Exercise 1: Organization Identification Memo due Sat 11:59pm

Week 4: Dynamics of PM (Sept 15-21)

- Preparation:
  1. Read De Bruijin Ch. 3
  2. Read Behn Article, Always Start with a Purpose (On Moodle)
3. Watch Mini-Lecture

- **Due:**
  1. None

**Week 5: Designing PM Systems (Sept 22-28)**

- **Preparation:**
  1. Read Van Dooren et al. Ch. 4
  2. Read De Bruijn Ch. 4
  3. Read Behn Articles, The Missing Feedback in Logic Models and Lots of Measures (On Moodle)
  4. Watch Mini-Lecture

- **Due:**
  1. PM Exercise 2: Logic Model due Sat 11:59

**Week 6: Incorporation of Performance Information (Sept 29- Oct 5)**

- **Preparation:**
  1. Read Van Dooren Ch. 5
  2. Read Behn Articles, Resources or Results and Measure Outputs (On Moodle)
  3. Watch Mini-Lecture

- **Due:**
  1. Team Discussion: Initial posts due Wed 11:59pm. Reply posts due Sat 11:59pm

**Week 7: Using Performance Information (Oct 6-12)**

- **Preparation:**
  1. Read Van Dooren Ch. 6-7
  3. Watch Mini-Lecture

- **Due:**
  1. Case Write-Up due Sat 11:59pm

**Week 8: Non-Use of Performance Information (Oct 13-19)**

- **Preparation:**
  1. Read Van Dooren Ch. 8
  2. Behn Articles, Failure has to be an Option and Why Performance Measures Get a Bad Rap
  3. Watch Mini-Lecture

- **Due:**
  1. PM Exercise 3: Measurement due Sat 11:59pm

**Week 9: Effects of Using Performance Information (Oct-20-26)**

- **Preparation:**
  1. Read Van Dooren Ch. 9
  2. Watch Mini-Lecture

- **Due:**
  1. Team Discussion: Initial posts due Wed 11:59pm. Reply posts due Sat 11:59pm
Week 10: Trust and Content in PM (Oct 27- Nov 2)
- Preparation:
  1. Read De Bruijn 5-6
  2. Watch Mini-Lecture
- Due:
  1. Post on your Book Club discussion board

Week 11: Improving PM (Nov 3-9)
- Preparation:
  1. Read De Bruijn Ch. 7-8
  2. Watch Mini-Lecture
- Due:
  1. PM Exercise 4: Benchmarking due Sat 11:59pm

Week 12: The Future of PM (Nov 10-16)
- Preparation:
  1. Read Van Dooren Ch. 10
  2. Watch Mini-Lecture
- Due:
  1. Team Discussion: Initial posts due Wed 11:59pm. Reply posts due Sat 11:59pm

Week 13: Building a Winning Culture in Government (Nov 17-23)
- Preparation:
  1. Read Leddin (the whole book, start early in the semester)
  2. Attend Book Club Meeting via Zoom
- Due:
  1. Book Club Evaluation/Analysis due Sat 11:59pm

Week 14: Thanksgiving Break (Nov 24-30)
- Preparation:
  1. None
- Due: None
  1. None

Week 15: Student Presentations (Dec 1-Dec 7)
- Preparation:
  1. Attend assigned student presentation group via Zoom
- Due:
  1. PM Exercise 5: Final Memo due Sat 11:59pm

Course Description:
This course focuses on the fundamentals of performance measurement and management systems and demonstrates how they are critical from a mission, strategic, funding, transparency and accountability perspective in both public and non-profit settings. It will cover not only how to select appropriate measures, but also how to implement a performance management system and use performance measures in managing towards excellence in 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.
Course Learning Objectives:

- Develop an understanding of the principles behind performance measurement and management.
- Develop a working knowledge of how to effectively apply performance assessment and management processes/techniques.
- Learn to improve program/project planning and accomplishment, facilitate effective decision making, assist budget formulation and justification, enhance transparency and accountability with stakeholders from goal-setting to performance reporting.
- Understand the different types of performance assessments and be able to select and implement the appropriate approach that best suits:
  1. the type of activity being assessed
  2. the audience to which the assessment is being provided
  3. the purpose of the assessment in terms of what the information is used for
  4. the most effective means by which to display results.

Course Materials:


Course Assignments:

Readings and Mini Lectures (Preparation):
I have provided you with course reading material that I believe will enhance your understanding of the field of performance measurement and provide you with real experience dealing with the challenges of managing and measuring organizational performance. The amount of reading I will assign you is not so onerous that you will have no time for anything else. As such, I expect you to complete ALL of the reading each week. It will be impossible to adequately complete the assignments without completing the reading and it will be easy to tell who has completed the reading and who has not given the nature of the assignments. I suggest starting early to give yourself enough time. Additionally, I will make available weekly mini lectures that will provide additional insight into some of the issues and content introduced in your readings. I will do my best to make these presentations informational and engaging. You should watch/read these lectures after you complete the reading but before you begin your initial team discussion post. I will also provide you with other materials to enhance your learning experience. I expect you to incorporate insights from the lectures into your assignments. Normally, these lectures will be posted by Saturday before the beginning of the next week.

Team Discussions:
Students are expected to follow the weekly reading schedule (listed above). These readings should be used for discussions and assignments. In order that we maximize mutual learning experience, you must complete the assigned readings according to the weekly schedule. Online learning generally provides considerable freedom, allowing students to often choose when and where they will participate in class activities. But at the same time, students have the same kinds of deadlines and structured responsibilities of a face-to-face class. In other words, flexibility must be balanced by responsibility. The class discussions will cover the course material that we have studied for a two week period of time. For
example, the Week 3 Team Discussion will cover the preliminary preparation materials for Week 1 through Week 3. The Week 6 Team Discussion will cover the preliminary preparation materials for Week’s 4 through 6, etc.

**Details for Discussion Leader:** Each student will serve as the discussion leader once. As the discussion leader, you “add a new topic” and pose your question to your team based upon the readings by 11:59p.m. (MST) on Tuesday night. This means that for the week you are discussion leader, you will need to begin the reading material for that week earlier than normal. It is the student’s responsibility to post on time and failure to post your question(s) by 11:59p.m. on Tuesday will result in zero points and forfeit your obligation to serve as a discussion leader for the semester. Please plan accordingly. Additionally, as the discussion leader, you will be expected to take a much more active role in facilitating the discussion among your classmates. I will be there along with you facilitating the discussion. You should also participate as normal on other discussion threads during that week.

**Details for Discussion Respondent:** If you are not the assigned discussion leader (which is most of the time), you are the respondent. You are required to respond to all of the questions posed by the discussion leaders by Wednesday night 11:59p.m. (MST). This means that you must be completed with the reading materials and the weekly lecture before this deadline. After Wednesday and until Saturday night, students are expected to make multiple substantive posts to their classmates and carry on a discussion with them. While the class discussion board hours are open 24 hours, I require that students send comments early to provide ample time for the exchange of ideas. Thus, if you wait until 10p.m Saturday to finally post your replies, your grade will reflect this. It should be noted that I do not have a set number of discussion posts that you must write in order to successfully complete this assignment. Such stringent measures often stifle discussion. At the end of each week, I will look at your participation on the discussion board holistically. Your initial posts on Wednesday and multiple reply posts that you make subsequently during the week should be thoughtful and substantive. This is not to say that you can’t make posts that are less substantive but only that I should be able to see that you were an active participant throughout the week. Importantly, if someone comments on a post you previously made, you should respond as quickly as possible. One of the biggest issues I have seen on discussion boards in the past are students not replying back to comments made to them. This is not how a discussion would work in the “real” world and it should not be how a discussion works in the “digital” world. A lack of participation will result in a loss of points for that week. For more detail on what I am looking for, see the team discussion rubric document posted in Week 3 on Moodle. Lastly, the discussion boards show me how much you engaged with the reading for the week. You should consistently reference the readings in your comments and connect them with your own ideas and thoughts. However, avoid writing such long posts that your classmates choose to overlook them (limit to 250 words each).

**Case Write-Up:**
This assignment will provide you with the opportunity to apply your understanding of the theory to practice by simulating a real world experience with performance measurement. It is one thing to learn the theory of PM, it is another to take that theory and apply it to complex situations. You will be presented with one complex performance measurement case (based on real life situations) in the which you will be required to analyze and write about. The case and subsequent assignment directions are provided on Moodle (Week 7).

**Performance Measurement Exercises:**
Again, keep in mind that one of the purposes of this class is to help you learn the practice of performance measurement and translate it into tangible skills moving forward. These exercises will
accomplish this goal. You will learn how to (1) identify organizational performance deficits (2) create a logic model, (3) measure organizational performance (4) conduct benchmarking and finally (5) write a memo summarizing your work. You will find that all of these skills will promote learning and prepare you for work in the public/nonprofit sector as an administrator, manager, or PM specialist.

The directions for each exercise are below:

1. **Choosing Organization/Identifying Performance Deficits**: You are required to select two programs/organizations that will potentially serve as the focus for your work in the course. You can select a place where you currently work, have worked, or would like to work. Think about what the organization is not doing well and write a sentence based on Bob Behn’s articles about performance deficits. Submit a one-page (single spaced) memo describing the organizations/programs you selected and what performance deficits you are concerned with.

2. **Logic Model Exercise**: In no more than 3-5 pages, including a one-page graphic, submit the following for one of the organizations you chose in section 3:

   A. Identify key organizational activities including the inputs that are consumed, the outputs that are created, and the initial, intermediate, and final outcomes that the activities hope to bring about.

   B. Using the information from A, organize a graphical representation of the program logic that clearly relates each major program activity to its inputs, and to the outputs and outcomes the program/organization generates.

   C. Draft an explanatory narrative that explains the graphic logic model in greater detail.

3. **Measurement Exercise**: you must determine what needs to be measured in your program/organization. Since you know “you get what you measure”, one of the most important decisions you must make as an organizational manager is determining strategic goals that are informed by the purpose you articulate.

   A. For each input, output, and outcome identified in your revised Logic Model from section 4, identify a series of 2-3 key indicators that you think are most important to determining the program’s/organization’s performance.

   B. Make sure each of the indicators is drafted in a way that is S.M.A.R.T.

   C. For the specific indicators that you will use, write a short memo (no more than three pages single spaced) that: articulates your program’s/organization’s strategic goals; identifies the source of the data, its form, how you plan to collect it, and when and with what frequency; what steps you will take to ensure that the data is reliable and that people in the program/organization do not “cheat”.

4. **Benchmarking Exercise**: Now that you have identified your program logic and established key measures and indicators of your program/organization, you will convert data into information by comparing what you have developed to other organizations. Here you will:

   A. Identify 2-3 relevant programs or organizations that will serve as your benchmark group.
B. Examine these programs to determine which, if any, performance measures they are using to demonstrate program success. Report and compare the measures used by each group and highlight differences that exist across the groups.

C. Compare the benchmark group measures to the set of key performance indicators you selected for your organization in 5.

D. Select a core group of measures that you will use annually to examine your program’s/organization’s performance against the benchmark group. (As it is a distinct possibility that you may have developed measures that are not used by others, include a paragraph that you will send to the other program’s/organization’s convincing them why you believe the measures are important.

E. Set performance targets based on the benchmark group or another mechanism for each measure and indicator.

5. Final Memo and Analysis: Assume that you have applied for a job or promotional opportunity for the program/organization that you have analyzed. Write a no more than 3-5 page memo to the head of the program/organization that pulls together all of the work that you have done during the semester, why the work is important for the organization, and why you’re the best person for the opportunity.

Book Club:
In addition to your normal textbooks, you will be assigned to read “Building a Winning Culture in Government: A Blueprint for Delivering Success in the Public Sector” by Patrick R. Leddin. If you have participated in a book club before, then you know that this is an incredibly fun way to engage a captivating book while others in your club are also reading it. The way this assignment will work is as follows:

1. You will start to read the book around midterm.
2. By Week 10, you should post on your Book Club discussion board (different from your team on the Team Discussions). One post should include your thoughts (including things you like and/or critiques) on the book so far and a couple of posts replying to your book club mates (you do not have to be done with the book at this point).
3. At some point during Week 13, you will have a 45-minute synchronous meeting via Zoom with your book club to discuss the book. You should arrive at the meeting having finished the book and with one question prepared that will promote thoughtful discussion with your book club mates.
4. After the book club meeting, you will submit a one-page analysis of the book and answer two short evaluation questions on your own preparedness/participation for the meeting as well as the observed preparedness/participation of your book club mates (this form can be found on Moodle Week 13).

Course Grades:
This course uses a form of grading called contract grading. There are no points or letter grades in this course, aside from the final letter grade you earn at the end. The premise of contract grading is that if you do the work required to earn a B, you will see enormous gains in your learning. Traditional grading systems encourage you to work for “points,” as if learning were a game whose goal was to get a certain grade. Contract grading redirects your focus on the process of learning. Contract grading provides you
with reassurance that if you complete all of the assigned work to the best of your abilities, you will earn at least a B (which is all you need to be in good standing in our department). This can free you up to focus on your learning, not your grade.

To put this system of grading in context, consider how your performance is evaluated in your own workplace. In most workplaces, you generally do not receive feedback in the form of a letter grade, but instead are given qualitative feedback with a possible numerical value attached. Similarly, in this class, I will evaluate your performance holistically and provide you with personalized feedback on each assignment. During the semester I will not assign grades or scores to individual assignments; instead I will provide written or verbal feedback on the assignments that you turn in. In my feedback I will identify the strong aspects of the assignment, point out information or concepts that were missing from your assignment, and/or suggest additional work (thinking, writing, reading, etc.) that you need to do in order to improve your understanding of the topic. Ideally this feedback will help you deepen your understanding of the material and concepts.

You can earn one of three grades in this class: A, B or C. There are no pluses or minuses for the final grades in this class.

Earning a C
You will earn a C in this class if you miss any assignment, submit assignments late, lack adequate participation on the class discussions, or submit writing that is not college level work. At the end of the semester, you will report on your completion of the reading each week throughout the semester in a survey. You will earn a C if you are unable to keep up with the readings and complete them in their entirety.

To Earn a B
You will earn a B in the class if you complete all of the work in the class (including the reading) with sincere effort and on time. This means staying up with the reading each week, actively participating in each class discussion, submitting all assignments on time, and actively participating in the book club and final presentation meetings. To earn a B, I expect your writing to reflect college level work including the use of outside sources as support, the proper citation of those sources, with absolutely no spelling or grammatical errors. The average final grade for the class will be a B. If you are score a B, that means you can be satisfied that you met all of the expectations of the course.

To Earn an A
You will earn an A in the class if you do all of what is required for a B and show excellence in your work. To earn an A, I ask that you put extra effort into your learning process and submit writing that goes above and beyond the minimum requirements. Some features I look for in A work include:

- Strong critical thinking, including the ability to understand and respond to other views
- Writing that shows critical reading and careful rereading
- Ideas that are uniquely your own, not just repeated from class discussions
- Taking risks in your writing (trying a new technique or a more challenging approach)
- Clear sentences, careful proofreading, and well-integrated quotes

I also ask that you stretch yourself in class discussions. If participating is hard for you, try to confront that fear with small steps such as asking questions. If participating is easy for you, try to hold back more and listen to others.
Mid Semester Check-In
Around Week 7 of the semester, I’ll ask you to complete a written self-evaluation. In this evaluation, you’ll tell me how you are doing in the class, in terms of your effort, completion of the readings/lectures, and participation on the discussion boards. You are also welcome to share any struggles you’re experiencing in the class. I’ll respond with my feedback.

Course Policies
Learning Framework for the Course
Following these process steps, the class will appear as such:

Preparation- I will provide you with readings/other prep materials and assignments that give you a base knowledge for our lectures, discussions and class activities each day. Ideally, these materials will enable you to carry on an informed conversation.

Teach Each Other- In this course, you will have the opportunity to discuss your learning with classmates on a regular basis. I will give you opportunities to critically think about the course material and discuss it with a group of students who will act as your team for the semester. Additionally, we will have full class discussions where we will explore a variety of topics.

Reflection- Upon learning about a topic, you will be given the opportunity to reflect upon your learning by completing several reflection case activities. These activities will assess your learning and allow you to demonstrate to me your newfound understanding.

Accessing the Course
Since this is an online course, each student is required to check our course site once per day and participate in discussions often. Keep in mind that our online course site on Moodle is organized by week – for example, each week contains links to brief lectures, discussions, assignment dropboxes, and other course materials.

Time Commitment
In higher education, the standard for work outside of class is this: for every credit hour taken, you should spend 2-3 hours outside of class per week. That means for a 3-credit course, you should end up spending about 6-9 hours outside of class each week on average. For an online class such as this, the time you spend working with the lectures and participating on discussion boards and/or in live Zoom meetings is considered time “in class”. Thus, course readings and course assignments are your time “outside of class” and should take 6-9 hours of your time on average each week.

Guidelines for Written Work
All written assignments should meet the following criteria unless otherwise noted in the assignment instructions or the professor:

1. All work must be typed, double-spaced, utilize 12 point times new roman font, and have one-inch margins.

2. Citations should follow a proper style guidelines such as, but not limited to, MLA, Chicago, or APA (in-text citations and a reference page are necessary).

3. Assignments are due on the date/time listed in the course schedule; late assignments will not be accepted,
4. All assignments must be turned in electronically via Microsoft Word. If the instructor cannot open the document, the student will not receive a grade. Submission of assignments via e-mail will not be accepted unless specific arrangements have been made.

5. Written work will be evaluated both in terms of content, following instructions, organization, and writing/grammar.

6. Student collusion is not allowed for individual assignments (unless working in an approved team) and will be treated as an act of plagiarism.

Note on Technology
No “technology problem” excuses will be accepted in this class. That is, you cannot blame your failure to complete an assignment on time on “computer/internet/Moodle issues” (unless it was one that affected the whole class, in which case we will address the issue on a class-wide basis). This means that you must not wait until the last minute to complete your work such that if you do have computer issues, you have time to find a solution. Three hints: try a different web browser, try a different computer, try a different Internet connection. The exception is you get one “retry” if your computer kicks you off while you submitting a document. I highly suggest that you save your work in multiple places. It is so imperative that you make this a habit now that you are in college. Many of you already have Microsoft OneDrive on your computers or use UMBox or Dropbox. If you happen to lose all your work because you made the choice to not back it up, you will have to start over and begin again. Furthermore, you cannot use the excuse that an assignment didn’t show up on your Moodle calendar. It is your responsibility to utilize the course calendar in this syllabus for all due dates.

Note on Late Work
Do not ask to submit an assignment late because the answer is already “No”. Never just plan on completing an assignment late. By doing so, you are taking a foolish, calculated risk of getting a zero. I only provide extensions in two circumstances. (1) If an emergency situation arises and you inform me BEFORE the due date, then I will consider your unique circumstances and make a decision. (2) If you have a disability AND have sent me an accommodation letter from Disability Services. Other than that, your work must be submitted on time. Your supervisor at work would not accept late and incomplete work. You should not expect your professor to do the same. I highly encourage that you take some time now to input all the due dates for this class as notifications in your calendar or on your phone. That way, you do not risk missing a due date.

Note on Debate Ethics
Some of the issues we discuss in this class are controversial with multiple, and sometimes divisive points of view. Although you may already have an established opinion on a particular topic, you are encouraged to consider other points of view and the strengths/weaknesses of your own. You may be surprised how much you learn by adopting this tactic in your analyses. Additionally, as we discuss controversial topics, you are expected to respect the points of view of your fellow students. Respect is shown in the manner you address other students and the words you use to carry your point across. In an increasingly uncivil political environment in the U.S., civility will be maintained in this class so as to elevate the educational experience of all present. I reserve the right to remove any posts from the discussion board that I deem to be uncivil.

Note on Academic Honesty
Students must follow the University’s policies for academic dishonesty. All work submitted must be your own; no duplicate work (work completed for another class) will not be accepted. Acts of cheating or
plagiarism will result in a grade of zero for the assignment. Moreover, acts of plagiarism will also be reported to the Academic Court. To avoid acts of plagiarism, cite each reference or source you use and give proper credit for the ideas, opinions, and findings of others. When you are using the exact words of others, you must use quotation marks and include the page number where you found the quote in your citation. For help on avoiding plagiarism, see the following resources from the UM Writing and Public Speaking Center.

Note on Sexual Misconduct
UM prohibits sex discrimination against any participant in its education programs or activities. Prohibited sex discrimination includes incidents of sexual harassment (including sexual violence), dating violence, domestic violence, sexual assault, and stalking (collectively “sexual misconduct”). As an instructor, one of my responsibilities is to help create a safe learning environment for my students and for the campus as a whole. University policy requires that I report all incidents of sexual misconduct that come to my attention. If you encounter sexual misconduct, please contact the Title IX Coordinator at (406)243-5710. Additional information about sexual misconduct and available resources can be found on the UM Office of Equal Opportunity and Affirmative Action website.

Note on Student Disability Related Needs
The University of Montana assures equal access to instruction through collaboration between students with disabilities, instructors, and Disability Services for Students. If you have a disability that adversely affects your academic performance, and you have not already registered with Disability Services, please contact Disability Services in Lommasson Center 154 or 406.243.2243. I will work with you and Disability Services to provide an appropriate modification.

Cultural Leave Policy
UM has a Cultural and Ceremonial Leave Policy: “Cultural or ceremonial leave allows excused absences for cultural, religious, and ceremonial purposes to meet the student’s customs and traditions or to participate in related activities. To receive an authorized absence for a cultural, religious or ceremonial event the student or their advisor (proxy) must submit a formal written request to the instructor. This must include a brief description (with inclusive dates) of the cultural event or ceremony and the importance of the student’s attendance or participation. Authorization for the absence is subject to approval by the instructor. Appeals may be made to the Chair, Dean or Provost. The excused absence or leave may not exceed five academic calendar days (not including weekends or holidays). Students remain responsible for completion or make-up of assignments as defined in the syllabus, at the discretion of the instructor.”