

NUTR 216: MANAGEMENT, PLANNING AND CONTROL OF NUTRITION AND HEALTH PROGRAMS AND ORGANIZATIONS

Spring 2016, On-Campus Hybrid Tufts University, Friedman School of Nutrition Science and Policy - (January 2016 - May 2016)

INSTRUCTOR

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REQUIRED TEXTBOOKS

Management Principles for Health Professionals, Fourth or Fifth Edition - Joan Gratto Liebler, Charles R. McConnell, Jones and Bartlett Publishers, 2008+
I strongly advise that you purchase used copies. Consider this website: <http://www.abebooks.com/servlet/SearchResults?kn=liebler+mcconnell&sts=t&x=0&y=0> and be sure to ONLY select the Fourth or Fifth editions.

Management Control in Nonprofit Organizations, Eighth or Ninth Edition – David W. Young, The Crimson Press, 2010+. **This text can only be purchased by sending an email to: Tony at CrimsonCenter@TheCrimsonGroup.org** He will then send you an invoice for \$65 (\$60 plus \$5 for shipping). Once the invoice is paid, he will ship you the book. The whole process should take no more than a few days assuming a timely payment.

COURSE DESCRIPTION

This course is designed to prepare students to become directors and managers who can translate and apply technical work and content knowledge in a way that is manageable, economically sustainable, and accountable. Key management concepts and principles for managing nutrition and health programs and organizations will be

addressed to equip students to function effectively in a management role. Case studies and readings will be used to convey a practical understanding of how to manage and coordinate business functions to achieve the goals and objectives of the organization. This course will deal with for-profit, but focus mainly on nonprofit organizations. Topics will include business and project planning, management control systems, financial management, budgeting, performance measurement, pricing and marketing of services, operations management and cost analysis. The course is designed to provide practical tools in areas we believe students need to acquire skills. The course is designed to develop an awareness of how each of these management functions interact and impact the organization.

The learning environment will be an open one, drawing on individual and collective experiences of class participants to compare and contrast such experiences with the didactic material from the curriculum. The philosophy of the course is that theory should inform practice and that practice should inform theory. In that way, the art and science of the management of organizations may become more accessible to students.

Overall Learning Objectives Accomplished as a Total Experience of the Class

Critical evaluation and thinking will be stressed such that class members learn to perfect their analytical skills. This will be accomplished by observation and practice. Specifically, students should expect to be able to

- identify and incorporate specific skills and techniques into their own leadership style
- understand what is necessary to function as program directors and project managers, understanding their management responsibilities and those of the leaders in their organization in finance, administration, public relations, development, human resources and facilities management
- understand how to manage and coordinate business functions to achieve the goals and objectives of the organization
- recognize how management functions interact and impact an organization
- present material in a succinct manner and to involve and interest the audience
- observe and practice formulating ideas using critical and analytical skills

Assignments

All written assignments are to be provided in electronic form only. The date and time of the email used to send the document will be used as the official submission date and time.

GRADING METHODOLOGY

10% - PARTICIPATION

Come to class prepared to discuss all case assignments, having completed the reading thoroughly and outlined your thoughts in response to the questions/issues as provided.

25% - CASE ANALYSES (WRITTEN) - TWO (12.5% each)

Prepare two written analyses of a maximum three to five pages in length [double spaced, with one-inch margins on the top, bottom and sides, and font size of 12 points] (not including exhibits, appendices, etc.) on cases of your choice from among those listed in the syllabus. The written analyses should (but not required) be done in groups. For such write-ups, the same grade will be provided to each student in the group.

18% - GRADED QUIZZES - THREE (6% each) [only the highest three quiz grades are counted]

All graded quizzes are timed and have firm deadlines. They may be taken at any time in the semester up until the individual due dates.

10% - JOURNAL GROUP PRESENTATION

Groups as assigned will present and discuss an article from a journal, illustrating an example of a challenge faced by management, and take a position they will defend in class. The article may be selected from an electronic medium. The article, and the position to be defended by the group needs to be posted by the student or the instructor one week prior to the class presentation. The presentation needs to be no more than ten minutes in length and should outline the key points raised in the article. The presentation team needs to identify their position and defend it. Class participants are expected to question and challenge the point of view as taken by the presenters.

37% MAJOR PAPER - ONE (choose either option I, II or III) - PREFERABLY DONE IN GROUP FORM

Option I

Prepare a fifteen-paged paper [double spaced, with one-inch margins on the top, bottom and sides of each page, and font size of 12 point] by 8:00 A.M. on the seventh day after the last class. This paper should integrate the concepts presented in the course and deal with an organization of your interest. The 35% is comprised of two components:

5% - Outline

The outline of the paper, in brief bullet point format, will need to be presented in writing (maximum of four pages) [double spaced, with one-inch margins on the top, bottom and sides of each page, and font size of 12 point]. This outline should describe:

- the nature of the organization
- identify the problem or issue to be addressed
- identify what has been done up until now by management to address the problem. The instructor will provide feedback and direction, in writing, and require that you then complete the fifteen-paged paper, clarifying whatever necessary from the initial document.

32% - Preparation of the completed paper (maximum 15 pages).

Your responsibility is to complete the paper, with expressions of critical thinking that examine:

- what alternatives are available and have been considered by management?
- identify what you recommend as a specific course of action with support for your recommendations, specifying the resources necessary and the roles for all concerned.

Do not repeat the material presented in the outline unless you have been specifically requested to amplify the material in the outline.

Option II - all 37%

Using the Assessment Tool provided, identify an organization with which you can interact and utilize all nine aspects of the tool. An Action Plan needs to be developed as a result of the assessment, to provide the organization with the appropriate next steps to address the issues described/identified as a result of the assessment. The Action Plan need only identify specific actions that will address three specific areas. The written product will be a description of the organization, the process that was undertaken in completing the assessment, and a defense of the selection of the actions identified as priorities. The same length constraints are in place as identified in Option I. All assessment tool questionnaires need to be submitted as exhibits.

Option III – all 37%

“Beyond Food”

Let us first assume the findings in this paper are correct. From a management perspective, including all of the subject matter covered in the course, what impact(s) do you foresee [e.g., including management policies, processes and approaches, organizational structures, field operation management, strategy, budget, communication]. In other words, what challenges does this present to management . . . what needs to change for organizations involved in this type of work . . . ?

Students will, separately, or in teams, thoroughly review and research the paper and provide a written response as identified above. Prepare a fifteen-paged paper [double spaced, with one-inch margins on the top, bottom and sides of each page, and font size of 12 point]. This paper should integrate the concepts presented in the course.

FEEDBACK TO THE INSTRUCTOR

You are invited to provide feedback in whatever forms comfortable during the course. The goal is for this experience to be helpful, thought provoking, challenging and stimulating and serve to provide both general knowledge and a specific skill set.

WEEKLY CLASSES

January 25, 2016 (Session 1)

Topics – Introduction; Structure of Course; Expectations and Grading Methodology; Approach to Case Study and Journal Presentation/Panel Discussions; Orientation to Web Site; Management Control - Principles of management control will be covered, identifying the roles and responsibilities of relevant participants.

Learning Objectives: Understand and apply the appropriate response to course requirements. Be able to identify the requisite roles and responsibilities for effective management controls in an organization. Be able to critically review an organization for the lack of essential elements and make recommendations for change/improvement.

READINGS

Liebler/McConnell - pages 12 - 27, 31 - 86
David W. Young - Chapter 1

ONLINE LECTURE(S)

Introduction to the Course
Management Control Overview

ASSIGNMENTS / DISCUSSIONS / ACTIVITES

Be prepared to identify and discuss the answers to the following two questions in class:

Identify the external variables that can and do affect organizations?

What is the relationship between each variable and the organization - is it one of "influence", or is it one of "control" - and in which direction is the influence and/or control - does the particular environmental variable affect the organization, or is it the reverse?

[February 1, 2016 \(Session 2\)](#)

Topics – Characteristics of Nonprofit Organizations and Financial Statement Terminology, Interpretation and Analysis. Nonprofit organizations will be characterized including legal, financial, structural and mission-orientation – compared and contrasted to the for profit sector. The balance sheet, income statement, and cash flow analysis will be explained to provide the student with a manager's view of how to use the information presented to both understand the organization and to derive some conclusions regarding its financial health and challenges.

Learning Objectives: Understand and apply the criteria for determining the non-profit status of an organization. Gain familiarity with the presentation of financial information and its ability to reveal important information about an organization's effectiveness. Students will understand the flow of cash in and out of an organization and the various types of financial performance metrics. With respect to the case study, students will gain experience in understanding management roles and behavior as it affects an organization's direction and environment.

READINGS

David W. Young - Chapter 2

Please read the PDF file shown below under ASSIGNMENTS/ DISCUSSIONS/ ACTIVITIES. Mouse over all of the comment fields where provided to learn the details behind each line of the statements.

ONLINE LECTURES

Financial Statements
Characteristics of Non-Profit Organizations

ASSIGNMENTS / DISCUSSIONS / ACTIVITES

Complete the discussion assignment regarding management experience. Be sure you have also viewed the recorded lectures from the first session.

Read the Gotham Meals on Wheels Case for this session and be prepared to discuss your responses to the questions **EXCEPT** - we will perform the financial analysis in class so please do not struggle with developing the financial statements requested in the questions at the end of the case. You may choose to use the Gotham Meals on Wheels case as your written case to submit for a grade. If you choose this case, you do NOT have to turn in the written project in time for our in-class meeting. As long as you turn in all written assignments by the end of the semester that is acceptable. I do, however, urge you to not let the work pile up...

In general, group work is preferred in this class, so do not hesitate to work on these assignments in clusters, even if you submit separate written work products.

[February 8, 2016 \(Session 3\)](#)

Topic - Management Control Structures

Learning Objectives: To understand the macro ways and structures managers use to measure how well an organization is proceeding in the accomplishment of the goals it has established. Students will become familiar with the terminology of organizational structures and how they function, and be able to classify the structures they see in practice in organizations, and to identify when important control systems are lacking.

READINGS

Liebler/McConnell - pgs. 171 - 226; 227 - 238

ONLINE LECTURE

Management Control

ASSIGNMENTS / DISCUSSIONS / ACTIVITIES

Following the instruction on slide 3 in the recorded lecture identified above, be prepared to briefly sketch the organizational structure for one of the organizations in which you have worked.

Following the instruction on slide 4 in the recorded lecture identified above, be prepared to discuss the best model type for each of the three organizations noted.

You will need to have made at least an initial posting into the Discussion Board regarding Management Experience by the third class meeting, and have read all the threads and responses from your colleagues.

Exercise: Becoming a Split-Department Manager [modified from Liebler/McConnell - pgs. 27 - 28]

Imagine that you are the manager of a department, the function of which is to provide service in your chosen profession. In other words, if your career is medical laboratory technology, you are a laboratory manager; if your field is nutrition, you manage nutritional services, and so on. You are employed by an institution sufficiently small that you represent the only level of management within your function. This means that you are a first-line manager in your area and you report directly to the central administration.

You have been in your position for about two years. Following some stressful early months you are beginning to feel that you have your job under control most of the time.

A possibility that for years had been talked about and argued throughout the local community, the merger of your organization with a similar but larger one (150% your organization's size) about 10 miles away, recently became a reality. One of the initial major changes undertaken by the new corporate entity was realignment of the management structure. In addition to placing the new corporate entity under a single chief executive officer, the realignment included, for most activities, bringing each function under a single manager. Between the merger date and the present, most department managers have been involved in the unpleasant process of competing against their counterparts for the single manager position.

You are the successful candidate, the survivor. Effective next Monday you will be running a combined department in two locations consisting of two and a half times the number of employees you have been accustomed to supervising.

Instructions:

Generate a list of the ways in which you believe your responsibilities and the tasks you perform are likely to change because of the merger and your resulting new role. Hint: It may be helpful to make lists of what you imagine to be the circumstances before and after your appointment. For example, two obvious points of comparison involve number of employees (which implies many necessary tasks) and travel inherent in the job. See how long a list you are able to generate.

Be prepared to present the list in class - verbally. This case may NOT be submitted in satisfaction of one of the two written case analyses.

[February 18, 2016 \(Session 4\) – A Thursday](#)

Topics - Measurement and Use of Cost Information; Pricing Policy and Practice; Comparative International Accounting; How an organization uses cost accounting information to track its progress towards strategic goals and objectives. The role of differential costs to measure performance of units and their managers. The use of accounting across the continents will be reviewed.

Learning Objectives: To understand how accounting information is used in different regions of the world, with special attention to developing countries. Students will understand the way accounting varies not so much in its principles but in its application. Students will become familiar with the terminology of cost tracking and measurement and the role accounting information plays in organizational behavior and performance measurement.

READINGS

David W. Young - Chapters 3 and 4
Liebler/McConnell - pgs. 147 - 167

ASSIGNMENTS / DISCUSSIONS / ACTIVITIES

Both of these are in the Liebler/McConnell text.

Activities (2):

Case - Paid to Make Decisions

Exercise - The Troublesome Professional

All students need to read both the case and the exercise and become comfortable with the material, as well as review the questions (Case) and instructions (Exercise) provided there.

I encourage you to work in groups of any size from two on up in accomplishing the following -

For students with surnames beginning with the letters A through I, you are to prepare the "Case" for discussion in class. Be prepared to comment thoughtfully on each question in the case.

For students with surnames beginning with the letters J through Z, you are to prepare the "Exercise" for discussion in class. Be prepared to comment on the instructions provided at the end of the exercise.

Either the Case or the Exercise can be written up as one/both of your two required case analyses.

[February 22, 2016 \(Session 5\)](#)

Topics - Strategic Planning

Learning Objectives: To understand each of the steps in strategic planning and how they are intended to function in creating the success path(s) for an organization to achieve its mission. Students will become familiar with the terminology and should be able to identify whether or not a strategic plan they read has been well-prepared. Students should also be able to critique the process of how an organization has developed its strategic plan. Tactical vs. strategic planning will be understood.

READINGS

Liebler/McConnell - pages 89 - 124

"Is There Any Strategy in Your Strategic Plan?" (PDF)

[February 29, 2016 \(Session 6\)](#)

Topic - Budget Development

Learning Objectives: Students should be able to create a full program budget and be able to critique budgets for attention to proper detail. Students should be able to ascertain whether or not proper planning has taken place in the development of a budget. The budget development process will be understood such that students will appreciate the various roles of the persons involved so that they can/will be able to exercise their budget development/planning/critiquing responsibilities once in a professional position or on a Board of Directors.

READINGS

Liebler/McConnell: pgs. - 275 - 303

David W. Young - Chapter 8

ASSIGNMENTS / DISCUSSIONS / ACTIVITES

For students with surnames beginning with the letters A through I, you are to prepare the "Adjust the Budget" exercise for response and discussion in class. Be prepared to illustrate your mathematical approaches.

For students with surnames beginning with the letters J through Z, you are to prepare the "Belt-Tightening" exercise for response and discussion in class. Be prepared to illustrate your mathematical approaches.

Neither of these exercises can be submitted as written case analyses for the semester assignment.

[March 7, 2016 \(Session 7\)](#)

Preliminary Outline of Final Paper Due

Topic – Operations Management

Learning Objectives: To understand the definition and purpose for operational control systems, including financial systems, use of ratios, internal and external audit. To review sample control systems and appreciate how the systems achieve the stated goals for the organization. The differences between operations analysis and program evaluation should become clear, and students should be able to apply the different techniques in the appropriate situation, depending upon the nature of the task and desired outcome.

READINGS

David W. Young - Chapter 9

[March 14, 2016 \(Session 8\)](#)

Topics - Measurement of Output at the Micro and Macro Levels

Learning Objectives: To understand the methods that are employed by organizations to track the degree to which the objectives of an organization are being achieved, with a major focus on the Balanced Scorecard approach. The roles and responsibilities of the individuals involved will be made clear. The potential for failure of these methods will be made clear such that students will be able to identify which methods should be applied in the field, and at what peril. To appreciate the importance of performance measurement at a macro (organizational) level as well as a micro (employee) level.

READING

All Balanced Scorecard materials

[March 28, 2016 \(Session 9\)](#)

Topic - The Life Cycle and Culture of Human Resource Management

Learning Objectives: Students will understand the full cycle of human resource activities from the identification of the need for a position, through recruitment, performance management, and eventual termination/resignation and outplacement programs. With this understanding, and the essential elements of successful supervision, students should be able to be more successful employees and supervisors because they understand the challenges and opportunities each role offers.

READINGS

Liebler/McConnell: - pgs. 385 - 406, and 453 - 477

ASSIGNMENTS / DISCUSSIONS / ACTIVITES

From the Liebler/McConnell text: - Please read the cases: "With Friends Like This" and "The Managerial Hot Seat" for discussion in class. Either/both of these may be submitted as one/both of the written case analyses.

[April 4, 2016 – NO CLASS – time provided for final project](#)

[April 11, 2016 \(Session 10\)](#)

Topics - Revenue Generation: Fund Raising, Social Entrepreneurship

Learning Objectives: Students should understand the role of alternative revenue sources, and the challenges involved in depending upon each one. The concepts and terminology of Social Entrepreneurship should become accessible to students, and they should understand how each of the types of activities could play a role in contributing to an organization's strength.

READINGS

Raising Money for Nonprofits in Terrible Times

Social Entrepreneurship - Capitalizing on Convergence

Social Entrepreneurship - Creating Social Change

An insider's view of acquiring that first-time donor using direct mail - (OPTIONAL)

Charity Lobbying in the Public Interest - (OPTIONAL)

ASSIGNMENTS / DISCUSSIONS / ACTIVITES

Your Charitable Giving (money, time or donation of a good or service) - be prepared to produce the single most important reason you have ever given to a particular charitable cause - in written form, and give the name of the charity. If you have never contributed any money, time, goods or services, be prepared to provide the single most important reason you would do so.

[April 25, 2016 \(Session 11\)](#)

Topic - Ethics, Morality and Judgment

Learning Objectives: understand and appreciate the issues of management in the nonprofit sector as complicated by the very essence of these organizations - that they focus on the remediation of immoral situations, they concern themselves with issues of social justice, and of aiding communities suffering from loss, abuse, neglect, and/or deprivation. Students will test their own individual assumptions regarding morality and ethics, and how these constructs complicate and, at the same time, inform management.

READINGS

Read the cases as identified here from the file, "Ethics in Nonprofit Management".

"Maureen's Dilemma" p. 10

"Where Loyalties Lie" p. 89

"What is the Color of Their Money?" p. 120

"The Wages of Doing Good" p. 148

ASSIGNMENTS / DISCUSSIONS / ACTIVITIES

The class will discuss the cases. Everyone is required to read each of the four cases. The class will be split into four groups once we gather in class on April 13.

"Maureen's Dilemma" p. 10

"Where Loyalties Lie" p. 89

"What is the Color of Their Money?" p. 120

"The Wages of Doing Good" p. 148

[May 2, 2016 \(Session 12\)](#)

Topic - Leadership and Communication

Learning Objectives: In this session, the concepts of all of the previous sessions are brought together to portray the essential elements of positive leadership as expressed through the actions, style and communication abilities of managers.

READINGS

Liebler, McConnell: pgs. 415 - 449; 515 - 537

ASSIGNMENTS / DISCUSSIONS / ACTIVITIES

The case of Handel Hospital will be used in our final class discussion. It is brief, and concludes with a series of questions. Everyone needs to be prepared to answer 1 and 3, and specific folks should prepare for #2 as indicated:

1. Evaluate the situation Handel Hospital is in. Identify the problems and their potential to affect the hospital, treating internal and external environmental dynamics and forces.
2. Propose specific action steps for the following, in their own best interests:
 - a. Medical Staff (surnames beginning with letters A - G)
 - b. Auxiliary Staff (surnames beginning with letters H - N)
 - c. Nursing Director (surnames beginning with letters O - T)
 - a. Chief Financial Officer (surnames beginning with letters U - Z)
3. You are a consultant brought in by Mr. Walder and Dr. Braun and have been asked the following question:

"What recommendations do you have for us?"

Now..... answer the question.....