INSTRUCTOR CONTACT INFORMATION
Lisa Barnwell Williams
Contact information will be provided through the course.
Office Hours: by appointment.

TECHNICAL SUPPORT CONTACT INFORMATION:
Students enrolled in UMass Online courses seeking technical assistance can get help 24 hours a day, 7 days a week through Blackboard Learn. For technical support, go to Help & Resources on the left menu of the course. For campus students, contact your instructor or the Instructional Media Lab at the UMass IT department.

ABOUT THE INSTRUCTOR:
Lisa Barnwell Williams helps nonprofit organizations to define and achieve their visions. She entered fundraising in the pre-internet 1980’s as one of the pioneers in online prospect research, and later led development efforts for several organizations of national stature, including Cincinnati Playhouse in the Park, Cincinnati Ballet, and the Agnes Irwin School. After serving as Vice President of a major international consulting firm, Lisa co-founded Chanticleer Consulting to serve nonprofits in a more flexible, creative, and client-focused way. She is a graduate of Williams College, and holds graduate degrees from New York University and Columbia University and a Certificate of Advanced Study in Management from the University of Chicago. Co-author of Building Strong Nonprofits: New Strategies for Growth and Sustainability, she has given seminars and workshops to countless audiences around the country on various aspects of organizational development, fund development, and communications.

COURSE DESCRIPTION
Strategic plans are essential to the long-term health of nonprofit organizations, allowing board members and staff to agree on a common direction for the organization. This course will introduce you to the principles and methods of strategic planning for nonprofit organizations and public agencies, and will introduce you to various types of plans and planning terms. Arts
organizations are used in instructor lectures and examples, but the course applies to any nonprofit organization or public agency. You will examine existing plans of your own nonprofit or a case study organization of your choosing. You will learn an eight-stage system for strategic planning, and design a planning process for your case study organization.

**COURSE OBJECTIVES**
This is a practical course that should enable you both to learn the principles of strategic planning and – if your organization is your case study -- apply what you learn to improve the agency’s planning (if planning is underway or pending) or position it for effective planning in the future. You will get the most out of this course if you work closely with your case study organization’s leaders. You may obtain the same results by working closely with a nonprofit organization of which you are not a member.

Your planning may be applied or academic. The course is designed so that your learning will be used to help a real nonprofit organization plan or prepare to plan. You may also learn a lot by studying a nonprofit organization and developing planning procedures that you may not actually apply. This is likely if your studies and your organization's planning cycle are out of synch or if you don't have access to decision-makers. In this case, your learning will be more academic. You must still take assignments seriously for my lectures are necessarily spare in this virtual classroom and we depend a lot on practical applications to learn.

In the best case, your case study staff and board members will be your partners in learning and will expect to see tangible results from your practical studies. Two outcomes will follow: you will increase your understanding and skill in planning and your organization’s leaders will become more adept at planning.

**Student learning outcomes:** You will set your own specific learner outcomes as part of our first class discussion. Here's what I expect you will be able to do by the end of the course:

- Document project plans in a procedures manual.
- Understand the language of planning well enough to distinguish and explain to your colleagues’ four types of plans and the terms mission, goals, objectives, and strategy.
- Understand an eight-step planning process well enough to adapt into a work plan for your own organization's planning.
- Design a planning retreat.
- Design useful assessment questions for use in interviews, focus groups, and surveys.
- Write compelling mission, goal, and objective statements for your organization.
- Convert intangible statements of intention (i.e., goals) into something more tangible (i.e., outcomes) that can be measured.

**PREREQUISITES**
LLAMS 01/HM&FNART 500 Introduction to Arts Management is the mandatory prerequisite for this class. In order to complete the assignments for this class, you will need to have and know how to use Microsoft Word (or comparable word processing program) and Adobe Acrobat.
HOW TO START THIS CLASS
For those of you who have never taken a blended or online class, the process can be a bit disorienting. For online students, we will work in Blackboard Learn. Take the time to familiarize yourself with the features of the class before you plunge in will help to smooth the transition to this new system. For campus students, this course may be blended, and all assignments and discussions are in Moodle.

I suggest that you take the following steps to get started with this class:

1. Begin by reading this syllabus in its entirety.
2. Order the book listed under “Required Readings” below.
3. Take the tutorials available to learn the online portion of the class. (Moodle: https://www.it.umass.edu/moodle and Blackboard Learn: https://uma.umassonline.net/ click “support center”).
4. Under your Courses tab on the main Blackboard screen, you will see Student Orientation for Blackboard Learn. This is a general overview of Blackboard Learn provided by the University. Although not all of the information will be applied directly to this class, it is a quick and effective way to get oriented with the system.
5. Within your Moodle or Blackboard course, click on the every button on the screen to explore the site.
6. Explore the folders contained on the Welcome section for this course, especially the Start Here & Helpful Links folder.
7. Take the Introductory Course Survey.
8. Read the instructions below.

HOW THIS CLASS IS ORGANIZED
In order to orient you to this class, below is a basic overview of the location of the main areas of your Blackboard Learn (online students) or Moodle (campus students) course. The sites are designed to be as user-friendly as possible. Below are the key components of the class, and which navigational links to use to access them. Find the links for Moodle and Blackboard Learn at the top of the UMass homepage site and login with your netID.
For Blackboard Learn:
HOW TO ACCESS YOUR WEEKLY COURSE WORK

Open Weekly Content in the Welcome screen or course menu to access your weekly course work.

On the Weekly Content screen you will find links to each week containing a lecture, discussion question(s), feedback, and readings. Note: Only a few weeks are visible in the early weeks of the semester. You will not be able to view any weekly content until the first official day of the course.

HOW TO ACCESS THE COURSE CALENDAR

The date of each class and associated assignment due dates can be found in a PDF located in the Course Calendar link on the course menu under your syllabus. You will also find the course calendar in this syllabus.
HOW TO ACCESS YOUR WEEKLY DISCUSSION AND FEEDBACK TOPICS

Almost every week, you are asked to respond to an open-ended question about a particular aspect of the lecture or readings. Discussion is only relevant and interesting during the week of the topic. We move on quickly, so post and monitor others’ posts. Do not fall behind as this is where students lose the most points (A’s turn to C’s). Online students will also post weekly Assignment in the Feedback section so that peers can offer feedback on written assignment (see below). Everyone must offer feedback on at least one other student’s paper each week. You can access the discussion and feedback areas in two ways. Click on the Week’s link in Weekly Content, or click on Discussions & Feedback on the course menu bar located at the left side of the screen.

A tutorial on posting in Discussion forums is located in your Student Orientation course under “Collaborating”.

HOW TO ACCESS YOUR WRITTEN ASSIGNMENTS

You will upload written assignments in response to problems that I pose for the class. You can find your assignments by clicking on the link for the appropriate week in Weekly Content or clicking the Assignments link in the Course Menu. When you are ready to submit your assignment, click on the course module for that week and navigate to the weekly written assignment. Former Blackboard Vista students please note: the Publishing option in the Assignments
tool is no longer available. You must also post your assignment in the Feedback forum for that week so that other students may read and respond to it. A tutorial on posting Assignments is located in your Student Orientation course under “Assignments and Grades”.

HOW TO TAKE TESTS/QUIZZES

Exams and surveys can be accessed in the Tests link in your course menu, or through the link for the week when the exam is assigned.

TASKS & ANNOUNCEMENTS PAGE

Access the Tasks & Announcements page by clicking to it from the course menu. Under My Announcements is where you will find announcements posted by your instructor. In your To Do list you will be able to view your upcoming assignments. (Please note: Discussion & Feedback will not appear in your To Do list) You can customize this page to your liking by clicking Customize Page in the top right corner.

CYBER CAFÉ

The Cyber Café in Blackboard Learn is where you will have the opportunity to have off-topic discussions with your classmates. Cyber Café is located on the home page area of the site or again, click on the course tools bar on the left of the screen. Here you can connect with other classmates about topics unrelated to the week’s assignments.

WHO’S ONLINE

Finally, this feature may appear on Blackboard Learn if you are working and have a question or just want to talk to a peer, look on the course tools bar, click on Who’s Online, and it may be
possible that a classmate is working. You can send him/her a chat invitation visible only to you. This is a great feature, but please be respectful of others’ time!

ASSIGNMENTS
You will be asked to complete one assignment and one discussion every week (in addition to required readings and the moderation of at least one discussion or feedback thread during the course of the semester). Some of these assignments may be substituted with other activities (such as an exam), but generally, you will be required to do the following each week:

1. **CONTRIBUTE TO A DISCUSSION TOPIC**, in which you are asked to respond to an open-ended question about a particular aspect of the lecture. Each week, one or two students will be assigned the task of moderating this discussion thread. *Please see MODERATION OF DISCUSSIONS below.*

2. **SUBMIT A WRITTEN ASSIGNMENT OR TAKE AN EXAM**, where you will upload a weekly one-page written assignment in response to a problem that I pose for the class, or, alternatively, take an exam.

3. **OFFER FEEDBACK IN A DISCUSSION THREAD**, in which you are asked to offer feedback on at least one written assignment of a fellow classmate. Each week, one or two students will be assigned the task of moderating this feedback thread. *Please see MODERATION OF DISCUSSIONS below.*

DISCUSSION THREAD MODERATION:
Beginning in the second or third week of class, each student will be assigned the task of moderating one feedback or discussion topic as a way to build community and foster a deeper engagement with course material. While I will also participate in discussions, my role will be to provide summary comments and respond to questions you direct specifically to me. Moderators will be asked to do the following:

- Introduce yourself as the moderator through the class email or in the discussion thread and restate the discussion question that I’ve posed.
- Contribute your own response to the discussion question.
- Read and respond to all main student discussion threads (i.e. you do not have to respond to every student, but must offer input into each thread that is opened by students).
- Pose follow up questions to stimulate discussion, drawing upon class material.
- Foster a civil and positive classroom environment.
- Move “off topic” conversations to the designated chat room area.

Typically, the discussion moderator will remind fellow students that s/he is moderating that week’s discussion or feedback thread by sending an email to all students and instructors. Here’s an example of an email that was sent out in a previous semester:
Hello Everyone!

I will be moderating the discussion board this week!

Discussion Topic: Week 9  (the student then pasted the instructions for that week’s discussion thread from the course)

Looking forward to our chats on the discussion board! Have a good week!

Best,
(name of student)

If you are not available to moderate the discussion during your assigned week, it is your responsibility to swap dates with another student and notify me of this change.

For Moodle:

**HOW TO ACCESS YOUR WEEKLY COURSE WORK**

For campus students only. Open **Weekly Content** by expanding one section or expanding all.
HOW TO ACCESS YOUR WEEKLY DISCUSSION TOPICS

Under the weekly content, you will see links to access discussions, assignments and lectures. You must complete your discussions and assignments in deadlines specified by clicking on the links and following the instructions.

HOW TO CHOOSE A CASE STUDY ORGANIZATION:

Case study organizations are a required component of this class. You will be applying your course work to a case study organization, for two reasons: (1) you will be making contact with professionals who work in the field of arts management, which will aid you in finding future employment in the field; (2) you will deal with the ambiguities and uncertainties of a real organization, which will prepare you for work in the field; (3) you will have the opportunity to apply your theoretical knowledge in practical situations. You must identify your case study organization by the second class session, and will be required to obtain information from your case study contact by the third class session, so you can complete course assignments. Here are some possibilities:

Choose Your Own Organization (highly recommended): If you are currently working or in an arts or culture organization, I recommend you use that organization as your case study organization.

Choose a nonprofit organization where you volunteer: You may obtain similar results by working with a nonprofit organization where you volunteer.

Contact an area arts agency or nonprofit that interests you: If you do not work or volunteer in a nonprofit agency, try contacting an organization whose work you find interesting. The Arts Extension Service office has forms and information that can help you in this initial conversation, so please contact them at 413-545-2360 for more information.
Choose a campus-based organization: For campus-based students, we will discuss on-campus options the first day of class.

A Note about Confidentiality: None of your assignments require you to identify your case study, which you can keep entirely confidential (assigning a fictitious name to a real organization), should the organization be concerned about revealing its operations.

If you have trouble... If you have any trouble, send an email to your instructor first, or to the Arts Extension Service for help on choosing an organization.

LATE ASSIGNMENT POLICY:
Only students with documented disabilities (see Students with Disabilities section below) are permitted to submit their assignments later than the agreed due dates. If your assignment is one week late, you will be marked down one full grade (for credit students only). Assignments submitted 10 days beyond their due dates or later will receive an F. This includes discussion and feedback postings, exams and all written assignments.

REQUIRED READING:
This class will draw from the following required text:

Fundamentals of Arts Management, sixth edition, 2016 (published by the Arts Extension Service). If you do not already own a copy of the Fundamentals of Arts Management, please order one online today by visiting the AES website at http://www.umass.edu/aes/publications/fundamentals-arts-management-6th-edition. The cost of the book is $69.00, plus shipping and handling. For international orders, please contact the AES office directly at aes@acad.umass.edu. If you live locally, you may waive the shipping charge by buying the book directly at our office during business hours Monday to Friday 9 am to 4 pm.

All other readings will be posted in the course shell (Blackboard or Moodle) or will have links to websites.

Note that the bookstore does not ship international orders, so contact the Arts Extension Service at aes@acad.umass.edu to discuss options. Students who own a 5th edition may use it; new students should purchase the 6th edition.

INSTRUCTOR FEEDBACK:
You will find my comments on your assignments in the “assignments” area of your course. I provide individual feedback to each student, and if I see common challenges emerging in the assignments, I will occasionally provide group feedback in the same feedback area you use to respond to your fellow classmates written assignments (see “How this Class is Organized” above). I will respond to discussion threads in the same area that you and your classmates offer responses to each other.
If you are new to distance education, you may find it frustrating to post a question (say on Friday) and not hear back from me until the next Tuesday.

**METHOD OF EVALUATION/GRADING:**
I will update the grade book regularly to reflect the completion of your assignments. Please check the Grade Book to see if I have recorded all of your work, and notify me if I have missed a contribution.

**Note that I use a point system in lieu of letter grades in the course grade book,** with 4=A, 3=B, 2=C, 1=D and 0=F for each assignment. Noncredit students who take this course on a pass/fail basis receive 10=pass and 0=fail.

**Grading will be based on the following criteria:**

1. **Written Assignments and Exams: 50% of overall grade (60% on campus)**
   You will be assigned papers and a final project. Written assignments will be assessed according to the criteria below. Written assignments and exams comprise 50% of your overall grade. Note that your final project alone constitutes 50% of this grade, or 25% of your overall grade. Written assignments will be assessed according to the following criteria:

<table>
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<tr>
<th>Grade</th>
<th>Grade</th>
<th>Description</th>
<th>Criteria</th>
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<tbody>
<tr>
<td>A</td>
<td>A</td>
<td>Exceptional</td>
<td>OUTSTANDING level of analysis that incorporates citations from course lectures and readings. Those that are worthy of the highest grade may draw upon additional resources that the student has spent the time to research (interviews, other readings, personal experiences. etc.). Student may expand upon the assignment by bringing in specific examples from cultural organizations that demonstrate that the student has engaged in the assignment and learned something new from it. Student responds fully to the assignment. Work reflects a student’s original thinking. Written assignments are checked for grammar and spelling, and are well organized and clearly presented. Any visual presentations are presented professionally and clearly. Equivalent to letter grade A.</td>
</tr>
<tr>
<td>B</td>
<td>B</td>
<td>Exceeds Minimum Expectations</td>
<td>GOOD level of analysis. Would be A level work except lacks either supporting evidence from course lectures and readings, professional presentation, and/or original thinking. Student responds fully to assignment. Paper is posted on time. Equivalent to letter grade B.</td>
</tr>
<tr>
<td>C</td>
<td>C</td>
<td>Meets Minimum Expectations</td>
<td>BASIC level of analysis or did not fully respond to assignment. Paper may be poorly organized or contain significant grammar or spelling errors. Equivalent to letter grade C.</td>
</tr>
<tr>
<td>Grade</td>
<td>Score</td>
<td>Description</td>
<td>Notes</td>
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<tr>
<td>D (1 point in grade book)</td>
<td>D</td>
<td>Needs Improvement</td>
<td>SUPERFICIAL level of analysis, minimal effort, or paper is late and downgraded accordingly. Student does not respond fully to the assignment or provides incomplete or missing answers. Equivalent to letter grade C.</td>
</tr>
<tr>
<td>F (0 points in grade book)</td>
<td>F</td>
<td>No Participation</td>
<td>No posting, posted late (see syllabus policy), failed to revise returned work, work is plagiarized (see syllabus policy). Equivalent to letter grade F.</td>
</tr>
<tr>
<td>PASS (10 points in grade book)</td>
<td>PASS</td>
<td>NONCREDIT STUDENTS ONLY</td>
<td>FOR NONCREDIT STUDENTS ONLY: this posting is equivalent to a letter grade of C or better. See the criteria above for specific details of how work is evaluated. If you are a credit student and have been given this grade in error, please notify me immediately. Equivalent to the letter grade P (Pass).</td>
</tr>
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2. Discussion Contributions and Moderation: 30% of overall grade (40% attendance and discussion)

Almost every week, you are required to contribute to a discussion thread, by responding to questions posed by the instructor. Create a new thread to respond to the discussion topic. I will grade your discussion topic and response using a rubric below. Note that moderators will be assessed using the criteria after the word MODERATORS in the rubric below. Discussion threads and moderation comprise 30% of your overall grade. See rubric above.

3. Online Feedback Thread: 20% of overall grade for online students

Each week, you are required to download one other student’s written assignment and respond to it in a feedback thread in the online portion of this class. Create a new thread for each response you offer.

QUALITY IN DISCUSSIONS....

This is usually the easiest area for students. Students who receive higher grades tend to ...
- respond fully to the discussion questions (this may seem obvious, but answer all parts of multi-part question!)
- are comprehensive and reflect a comprehension of the material presented (or at least, an effort to comprehend it!)
- acknowledge and build upon the responses of others
• display a high level of grace and encouragement of others, and draw upon personal experience to help others to overcome challenges in their case study organizations or to grapple with the discussion questions. We are all learning together!
• remember to move off-topic discussions to a chat room so you have privacy.

QUALITY IN PEER FEEDBACK (online only)...

This is typically the most problematic part of the course for students. This is partly due to shyness and a lack of familiarity with how to give feedback to others in the course without offending them. My experience is that, with sensitivity and encouragement, you can offer substantive feedback that is both constructive and positive.

When providing peer-to-peer feedback on the written assignment of one other student each week, a student who receives a higher grade will often ....
• compare and contrast information within another student’s assignment or draw upon that student’s other written assignments, for example... “Chris, I noticed that you said you were confused with the differences in job descriptions in cultural organizations’ Executive Director and the Development Director. Could you elaborate on this?....etc.”
• draw upon other content in the course and apply it in the feedback they offer others. “...As we learned in the book (or lecture), volunteers play a vital role in the work of nonprofits... I noticed that some cultural organizations are intentionally excluding volunteer help, can you tell us why that is and what you think they could be gaining from a volunteer force?...”
• draw upon their own experiences and weave this into their analysis of other student’s work, offering respectful and sensitive advice to others, while paying attention to the content of the assignment.
• respond comprehensively to a fellow student’s work, not with a one-line response, but a more elaborate and in-depth reflection on the work.

STUDENTS WITH DISABILITIES

I am very committed to full access to all students, including those with disabilities, and am aided by the University’s Disability Services in helping to make our courses fully accessible. I am proud of, and am fully committed to, our University’s nondiscrimination policy, which can be found at http://www.umass.edu/eod/aapolicy.html. If you have a documented disability, please contact the Disability Services department to get assistance with accommodations, and they will help to make this course fully accessible to you. If I do not receive notification from Disability Services of your documented disability by the second week of class, I will not be able to offer you accommodations which are available here: http://www.umass.edu/disability/students.html. Please see their brochure about accommodations at http://www.umass.edu/eod/brochures/ds.pdf and their web site at http://www.umass.edu/disability/index.html.
ACADEMIC HONESTY POLICY
The University prohibits dishonesty in all programs of the University. According to University policy, “academic dishonesty includes but is not limited to: cheating, fabrication, plagiarism, and facilitating dishonesty.” Please see the University’s academic honesty policy for a full definition of academic honesty and our statement of policy. Obviously, I will be very strict about enforcing this policy in all of your assignments, so please read and be aware of this policy: http://www.umass.edu/dean_students/codeofconduct/acad honesty/. At times it can be difficult to understand what plagiarism is when you are working in an online environment. For instance, if you copy text from a web site or from materials from a cultural organization, please be sure to footnote the source of this text. I will follow the University's procedures if I suspect academic dishonesty, so please familiarize yourself with these policies. Also, please be aware that I may use a grading tool called Turn It In to grade your papers, which helps to detect plagiarism.

STUDENT CONDUCT:
The University has very clear guidelines about proper conduct in courses, including harassment and assault which are articulated in the Code of Student Conduct at http://www.umass.edu/dean_students/codeofconduct/studentcode/. I will take immediate corrective action if I observe any student acting in a manner that endangers other students. I also deeply value the principal that the classroom is a place for constructive dialogue and learning and I expect that students will treat each other with civility and respect, even when they disagree. A positive learning environment benefits everyone in the class, and I will do all I can to foster this atmosphere, and expect that you will do the same.

INCOMPLETES AND WITHDRAWALS:
Please keep up with the work each week and move through assignments, discussions, and feedback together with other students. I will not accept or grade more than two weeks of late assignments posted at the end of the course.

If you are falling seriously behind in your work, I highly recommend that you withdraw from the class by the mid-semester deadline, so that a failing grade does not appear on your transcript. If you are in this predicament, please go to the academic calendar page at http://www.umass.edu/registrar/gen_info/academic_calendar.htm and scroll down to the current semester to locate the last day to drop with a “W.”

EXTRA CREDIT POLICY:
I do not offer extra credit for coursework, except in those cases where I have created an additional assignment or exam that is specifically marked “extra credit.” You will not receive extra credit for reworking graded assignments, nor will I change grades with further editing.
INFORMATION ABOUT ACADEMIC CREDIT AND CERTIFICATION PROGRAM (online only):

Availability of Undergraduate and Graduate Credit:
For many of you this is a non-credit course. The Arts Extension Service grants three credits for each course for an additional fee. Because this course is a 500 level class, it is my understanding that it can be applied to both undergraduate and graduate-level programs. If you wish to receive credit for this course, please do this prior to the start of the semester, but if it is done later, the last date you may switch to credit is during the ADD/DROP period.

Students enrolled in a graduate course may seek permission from their advisors to use this course to fulfill independent study or practicum graduate course requirements. Contact your advisor and the Arts Extension Service for more information at aes@acad.umass.edu. Credit students are held to a higher standard for class participation and assignments (see above).

Noncredit Certificate in Arts Management
The Arts Extension Service offers a noncredit Core Certificate in Arts Management for those who successfully complete (with a passing grade) any four online courses offered by the Arts Extension Service. A Professional Certificate is granted to those who successfully complete eight courses. This course may be used towards the completion of your certificate program. You can also earn the courses for credit towards our certificate program. There is also a new campus Certificate in Arts Management for undergraduate students. Please visit http://www.umass.edu/aes/degreescertificate/campus-certificate for more details.

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