In Cultural Institutions

Spring, 2019

Instructor Information
Philip J. Piety, Ph.D. ppiety@umd.edu,
Senior Lecturer and Learning Scientist,
College of Information Studies

Introduction

This course focuses on providing a sound foundation in the core competencies needed to lead and manage information-based cultural institutions (i.e. libraries, archives, museums, historical societies) in the 21st century. The course provides an overview of the principles, practices, and techniques required for effective leadership and management, and focuses on innovative strategies, management responsibilities, and the skills needed to achieve and sustain high organizational performance.

Learning Outcomes:

Upon completing the course students will:

- Be familiar with the concepts and methods of principled management leadership, including the evolution of management theories from classical to contemporary and the principles associated with some of the major schools of thought around management.
- Develop and demonstrate skills in organizational planning; program management (analysis, implementation, evaluation); and the utilization of technology-based products and services.
- Understand and apply sound principles in developing and utilizing human capital, financial resources, and facilities.
- Understand stakeholder engagement and principles of communications, advocacy, building partnerships and networks, and customer service.
- Understand concepts of organizational performance metrics,
- Basics of project planning and common project management documents
- Financial competency, including spreadsheets and budgeting, including using Microsoft Excel
- Written business communication, including developing formal reports and plans
- Development of solution proposals that take a specific problem and propose a solution where a cultural institution can be funded.
Deadlines

Please note that all assignments must be completed on time. If there are extenuating circumstances, such as illness or some other unexpected event, please contact me.

Office Hours

By appointment. Mondays and many Thursdays before class are common times.

Contacting me

If you have any questions during the course, please contact me by clicking on my e-mail on the course web site. For other questions, please e-mail me at ppiety@umd.edu

Submitting assignments

Please submit all assignments using the assignments tool in ELMS. Please submit in Word if possible.

Course Materials

- *Principles of Management* By: Talya Bauer, Berrin Erdogan, Jeremy Short, and Mason A. Carpenter Version: 3.0 Published by Flatworld Knowledge: June 2016
- Other material will be posted on the course ELMS site.
- Lectures and case discussion provide for a common background and round out the schedule.

Syllabus change policy

This syllabus is a guide for the course and is subject to change with advance notice.

Students with Disabilities

The University is legally obligated to provide appropriate accommodations for students with disabilities. The campus' Disability Support Services Office (DSS) works with students and faculty to address a variety of issues ranging from test anxiety to physical and psychological disabilities. If a student or instructor believes that the student may have a disability, they should consult with DSS (4-7682, email Dissup@umd.edu). Note that to receive accommodations, students must first have their disabilities documented by DSS. The office then prepares an Accommodation Letter for course instructors regarding needed accommodations. Students are responsible for presenting this letter to their instructors.

Attendance Policy

University policy excuses the absences of students for illness, religious observances, participation in University activities at the request of university authorities and compelling circumstances beyond the student's control. Students who miss a single class for a medical reason are not required to provide medical documentation, but students who are absent more than once are responsible for providing various forms of documentation, depending on the nature of the absence. Course syllabi should
specify the nature of the in-class participation expected and the effects of absences on students' grades. For more information, see University Policy V-1.00G on Medically Necessary Absence.

*Note: students who miss classes may lose the opportunity to earn valuable points in the class.*

**Peer Evaluations:**

Students are expected to work well in teams. This means being responsive to the needs of their team mates and produce high quality work. In cases where there are indications some students are not performing to the level their team-mates expect then peer evaluations may be done and points deducted as deemed appropriate by the professor.

**Academic Integrity: What is academic dishonesty?**

Academic dishonesty is a corrosive force in the academic life of a university. It jeopardizes the quality of education and depreciates the genuine achievements of others. Apathy or acquiescence in the presence of academic dishonesty is not a neutral act. All members of the University Community - students, faculty, and staff - share the responsibility to challenge and make known acts of apparent academic dishonesty.

Students have a responsibility to familiarize themselves with violations of the Code of Academic Integrity. Among these include:

- **Cheating** "Intentionally using or attempting to use unauthorized materials, information, or study aids in any academic exercise."
- **Fabrication** "Intentional and unauthorized falsification or invention of any information or citation in an academic exercise."
- **Facilitating Academic Dishonesty** "Intentionally or knowingly helping or attempting to help another to commit an act of academic dishonesty."
- **Plagiarism** "Intentionally or knowingly representing the words or ideas of another as one's own in an academic exercise."

For further clarification or information on the Code of Academic Integrity:

[http://www.studenthonorcouncil.umd.edu/code.html](http://www.studenthonorcouncil.umd.edu/code.html)

**Assignment due dates and extensions**

Assignments must be completed using Elms. All quizzes and tests will be completed on the Elms platform. If you have difficulty using elms see the tutorial at [https://elms.umd.edu/webapps/portal/frameset.jsp?tab_id=-300_1](https://elms.umd.edu/webapps/portal/frameset.jsp?tab_id=-300_1) Assignments must be turned in on time.

Quizzes and exams not completed on time (e.g. in class for in-person sections or by end of week for online sections) will not continue to be available and may not be completed after the due date.
Other assignments turned in late without prior approval will be docked the equivalent of one letter grade (e.g. a B instead of an A). If you are unable to turn the assignment in by the due date, contact me prior to the due date to arrange an alternative due date to ensure full credit.

Please see me privately or email me if you have an emergency.

**Grade Components**

The following grade elements will be used in this course.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Category</th>
<th>How Earned</th>
</tr>
</thead>
<tbody>
<tr>
<td>10%</td>
<td>Participation</td>
<td>Individual</td>
</tr>
<tr>
<td>5%</td>
<td>Organizational Profile</td>
<td>Team</td>
</tr>
<tr>
<td>20%</td>
<td>Tests</td>
<td>Individual</td>
</tr>
<tr>
<td>15%</td>
<td>Excel Homework</td>
<td>Individual</td>
</tr>
<tr>
<td>10%</td>
<td>Project Plan</td>
<td>Team</td>
</tr>
<tr>
<td>15%</td>
<td>Professional Profile Report</td>
<td>Individual</td>
</tr>
<tr>
<td>5%</td>
<td>Professional Profile Discussions</td>
<td>Individuals</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(in groups)</td>
</tr>
<tr>
<td>5%</td>
<td>Final Presentation</td>
<td>TBD</td>
</tr>
<tr>
<td>15%</td>
<td>Final Project: Funding Proposal</td>
<td>Team</td>
</tr>
</tbody>
</table>

**Class Participation**

Students are expected to contribute actively in class to the benefit of all. This implies being well prepared for the discussion of the week’s reading and/or case. Those with prior background in the subject area are invited to share their knowledge with us as may be appropriate. Students are graded on a two-point scale for their participation in each session: two points are earned for very good participation; one point for satisfactory participation; no point for unsatisfactory participation (i.e., attending the class session but making insignificant or no contribution) or absence.

**Tests**

There will be two tests during the course of this semester. Each test will be a closed-book test, aiming to assess the extent to which the student is now familiar with basic concepts and terminology on teams and organizations. The assessments consist of a mixture of multiple-choice questions and open response questions based on the textbook, cases, and class discussions. The two tests will count toward 20% of the course grade. Students who miss an assessment because of excused absence (illness or religious holiday) are responsible for promptly notifying the professor to arrange a makeup exam. It is the student’s responsibility to communicate and arrange the makeup and failure to do so can result in a partial credit (ex: 50%) makeup or no makeup opportunity at all.

**Organizational Profile**

Students in a small group will develop an organizational profile of a cultural organization. The essential element in this document will be an organization chart.
Excel Homework
Students will work independently on learning Excel. They will use a workbook and examples datasets aligned to Lynda videos. This activity will assist students in learning some of the essential features of Microsoft Excel.

Project Plan
Students in small groups will develop a project plan that reflects a fairly uncomplicated set of activities with dependencies. This plan will be a business document that includes:
- Introduction and front matter
- Work breakdown structure
- Gantt chart
- Pert chart

All of these elements will be developed in an integrated document.

Professional Profile Report
Each student individually will develop a report about a particular manager or executive in a real cultural institution.
- Overview
- Stakeholder descriptions
- Performance metrics plan

Each student will find and profile a different individual. Students will then be placed into groups and will provide their report to fellow students for review and commentary. This process will then allow students to learn about different kinds of professionals than the one they worked with and to provide support for their fellow students.

Professional Profile Discussion
This is an individual assignment within groups where each student will provide suggestions to other individuals’ written drafts. Quality of contributions will be evaluated for grade.

Final Project: Funding Proposal
This class will feature a final project that is worth a total of 30 percent of the grade. This project is done in teams and involves students learning about and explaining the implications of a technology that has (or might) change the way that people work in organizations and/or teams. It will be important for teams to address the project in a way that connects to the lessons learned in this class.

Final Presentation: TBD
It is common and at times valuable for students to share their work with each other when they have different projects they are working on. That said, it is also at times a chore without a lot of perceived value. In this class we will discuss options for how to have a meaningful final presentation that has knowledge exchange and value for this group of students.

Typical Grade Distributions
In this class, an "A" denotes full achievement of the goals of the class; a "B" denotes good progress towards the learning objectives; and a "C" indicates that you were able to comprehend the concepts involved but were unable to effectively apply that knowledge.

<table>
<thead>
<tr>
<th>Grade</th>
<th>Percentage Range</th>
<th>Grade</th>
<th>Percentage Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>A +</td>
<td>98-100 percentage (or top 3 students)</td>
<td>C</td>
<td>73-77.99</td>
</tr>
<tr>
<td>A</td>
<td>93-97.99</td>
<td>C-</td>
<td>70-72.99</td>
</tr>
<tr>
<td>B+</td>
<td>88-89.99</td>
<td>D</td>
<td>63-67.99</td>
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<tr>
<td>B</td>
<td>83-87.99</td>
<td>D-</td>
<td>60-62.99</td>
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<tr>
<td>B-</td>
<td>80-82.99</td>
<td>F</td>
<td>Lower than 60</td>
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<tr>
<td>C+</td>
<td>78-79.99</td>
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</tbody>
</table>

Since the grading is based on a percentage-based system, an F is not the same thing as a zero. Failing work still earns some points. You are always better off to turn something in and get feedback on what you were able to complete. The percentage-based system also means that you can keep track of your progress and always know what your current grade is in the course in ELMS. You are encouraged to monitor your own performance. However, note that the percentages in ELMS may not always be accurate. Students should divide their total points earned by the total number available to know their actual percentage standing.

Note that some assignments in the participation category, including some quizzes may have no score entered if the student was not in attendance on that day. This distinguishes the score from a zero and influences some allocation of participation points.

**Caveat**

If any issue related to this course is not covered by this syllabus, then please refer to the Course Related Policies at [http://www.ugst.umd.edu/courserelatedpolicies.html](http://www.ugst.umd.edu/courserelatedpolicies.html).
**Schedule Overview**

This is the preliminary schedule for the class. This will be refined in the first weeks of the class as the students and instructor get to know each other.

<table>
<thead>
<tr>
<th>Date</th>
<th>Topics</th>
<th>Primary Reading</th>
<th>Activity</th>
<th>Due (Fri midnight)</th>
</tr>
</thead>
<tbody>
<tr>
<td>31-Jan</td>
<td>Introduction</td>
<td>Chapter 1: Introduction to Principles of Management</td>
<td>Explore range of cultural institution leadership roles</td>
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<tr>
<td></td>
<td></td>
<td>ELMS: Cultural Institutions in the Digital Age</td>
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<tr>
<td>7-Feb</td>
<td>Background on management</td>
<td>Chapter 2 History, Globalization, and Ethics</td>
<td>Develop an organization chart for a cultural institution</td>
<td>Organizational Profile</td>
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<td></td>
<td></td>
<td>Chapter 7 Organizational Structure and Change</td>
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</tr>
<tr>
<td>14-Feb</td>
<td>Teams and work behaviors</td>
<td>Chapter 12 Managing Groups and Teams</td>
<td></td>
<td>Excel Assignment 1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Chapter 3 Personality, Attitudes, and Work Behaviors</td>
<td></td>
<td>Professional profile proposal</td>
</tr>
<tr>
<td>21-Feb</td>
<td>Test 1 (10 points)</td>
<td></td>
<td></td>
<td>Excel Assignment 2</td>
</tr>
<tr>
<td></td>
<td>Activity on roles</td>
<td>Accounting Fundamentals, Managing Nonprofits (Lyndatraining.umd.edu)</td>
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<td></td>
<td></td>
<td>Budgets and Finance in Cultural Institutions</td>
<td></td>
<td>Excel Assignment 3</td>
</tr>
<tr>
<td>28-Feb</td>
<td>Budgets and finance</td>
<td>Accounting Fundamentals, Managing Nonprofits (Lyndatraining.umd.edu)</td>
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<tr>
<td></td>
<td></td>
<td>Budgets and Finance in Cultural Institutions</td>
<td></td>
<td>Excel Assignment 4</td>
</tr>
<tr>
<td>7-Mar</td>
<td>Goals and control</td>
<td>Chapter 6 Goals and Objectives</td>
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<td>Excel Assignment 4</td>
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<td></td>
<td></td>
<td>Chapter 14 The Essentials of Control</td>
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<tr>
<td>14-Mar</td>
<td>Project management</td>
<td>PM: Chapter 2 Introduction to Project Management</td>
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<td>Excel Assignment 5</td>
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<td><a href="https://opentextbc.ca/projectmanagement/">https://opentextbc.ca/projectmanagement/</a></td>
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<tr>
<td>21-Mar</td>
<td>Test 2 (10 points)</td>
<td>Funding programs search</td>
<td></td>
<td>Excel Assignment 2</td>
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<tr>
<td></td>
<td>Activity on roles</td>
<td>Writing funding proposals</td>
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<tr>
<td>28-Mar</td>
<td>Spring Break</td>
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<tr>
<td>4-Apr</td>
<td>Missions and communication</td>
<td>Chapter 11 Communication in Organizations</td>
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<td>Professional profile proposal</td>
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<td></td>
<td></td>
<td>Chapter 4 Developing Mission, Vision, and Values</td>
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<tr>
<td>11-Apr</td>
<td>Human Capital</td>
<td>Chapter 15 Strategic Human Resource Management</td>
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<td></td>
<td>ELMS: Equity and Affirmative Action, and performance appraisal</td>
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<tr>
<td>18-Apr</td>
<td>Leading and motivation</td>
<td>Chapter 13 Motivating Employees, Chapter 9 Leading People and Organizations</td>
<td></td>
<td>Professional profile discussion</td>
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<tr>
<td></td>
<td></td>
<td>Chapter 8 Organizational Culture</td>
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<tr>
<td>25-Apr</td>
<td>New approaches to management</td>
<td>ELMS: Agile and Holocacy</td>
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<td>ELMS: Cultural Change</td>
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<tr>
<td>2-May</td>
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<tr>
<td>9-May</td>
<td></td>
<td>FINAL PRESENTATIONS</td>
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</tbody>
</table>
**Detailed Schedule**

**31-Jan  Introduction**
Read prior to class:

- Chapter 1: Introduction to Principles of Management

**7-Feb  Background on management**
Read prior to class:

- Chapter 2 History, Globalization, and Ethics
- Chapter 7 Organizational Structure and Change

**14-Feb  Teams and work behaviors**
Read prior to class:

- Chapter 12 Managing Groups and Teams
- Chapter 3 Personality, Attitudes, and Work Behaviors

**21-Feb  Test 1/Activity on roles**
Test on computer or paper

**28-Feb  Budgets and finance  Accounting Fundamentals**
Read prior to class:

- Managing Nonprofits (Lyndatraining.umd.edu)
7-Mar  Goals and control
Read prior to class:
- Chapter 6 Goals and Objectives
- Chapter 14 The Essentials of Control

14-Mar  Project Management
Read prior to class:
- PM: Chapter 2 Introduction to Project Management
  https://opentextbc.ca/projectmanagement/
- PM: Chapter 3 The Project Life Cycle (Phases)
- Chapter 4 Project Management Framework

21-Mar  Test 2/Funding programs search

28-Mar  Spring Break

4-Apr  Missions and communication
Read prior to class:
- Chapter 11 Communication in Organizations
- Chapter 4 Developing Mission, Vision, and Values

11-Apr  Human Capital
Read prior to class:
- Chapter 15 Strategic Human Resource Management
- Equity and Affirmative Action, and performance appraisal

18-Apr  Leading and Motivation
Read prior to class:
- Chapter 9 Leading People and Organizations
- Chapter 8 Organizational Culture
- Beth Boatright, "Leading the Library (When You're Not in Charge)," College & Undergraduate Libraries, 22 (2015), 3-4, 343-357
- George Mariz et al., “Leadership Skills for Archivists,” American Archivist 74

25-Apr  Managing Meetings
Read prior to class:
- Mosaic Whitepaper: managing meetings
2-May New Approaches to Management

Read prior to class:

- Chapter 13 Motivating Employees,
- Need Agile
- https://hbr.org/2017/03/case-study-is-holacracy-for-us

Cultural Change

9-May FINAL PRESENTATIONS

Discussion Board Forums

I will use the Announcements tool and e-mail to disseminate information to the class, including information about the course schedule, syllabus or assignments.

We will use two online discussion forums in the course:

1. **Weekly Discussion Forums.** For most of the units, there is a weekly discussion topic related to the theme of the week. Please participate in *four* of these, your choice. These are discussed below.

2. **Class Bio Forum.** As noted above, please begin by writing a short mini-biography with information that you are willing to share with your colleagues in class. Please post by Sept. 10.

Readings

Please note that there is a good deal of choice in what you read for the course. You can select based on your interests and needs.
Books. Three books are required for the course. Copies are available at the bookstore or you may order via Amazon or in any other way you wish.

Bruce W. Dearstyne, *Managing Records and Information Programs: Principles, Techniques and Tools*. Lenexa, KS: ARMA International 2009. This is the central text for the course, written specifically for information professionals in information programs. (Just FYI -- I do not receive any royalties from this book.)


Cheryl Bryan, *Managing Facilities for Results*. Chicago: American Library Association, 2007. (Please read this as you have time during the course.)

Articles. Articles are available online and can be accessed via the [University Library's research port](http://www.lib.umd.edu/help.html). You can select databases by author or article title. These databases may be particularly helpful: Quick Search, Article First, Academic Search Complete, Business Source Complete, Emerald, Google Scholar, JSTOR, and Library and Information Science Source. Occasionally, an article may be unavailable because the publisher has put new restrictions on its access or for some other reason. In that case, the best approach usually is just to select some other article.

If you have any problems, contact the University Library (a good place to start is their Ask Us! page: [http://www.lib.umd.edu/help.html](http://www.lib.umd.edu/help.html)), or let me know.

Some of these articles have long sections on research methodology near the beginning. Often you can skim this to save time, and concentrate on the findings and conclusions.

There are a few additional optional book chapters, available in PDF on the “Files” section of the course web site.

Other material. Other items are available online by clicking on the URL provided in the syllabus.

Assignments

There are two types of assignments are required: (1) weekly assignments; (2) a research paper.

Please note that there are no exams in this course.
1. Weekly Assignments.

Please read the lecture notes each week. There are lecture notes for most units. The notes are posted in the “Files” section of the course web site. The lecture notes provide interpretations and insights; summarize other experts; and supplement the readings. They also provide a partial basis for the weekly discussions or written assignments.

Please also read the assigned readings each week.

There are two types of weekly assignments – 4 short written essays and 4 online discussions.

Four written essays (5-8 pages double spaced). There are written assignments for most of the units, but please note that you need to submit only 4. At least one of the four must be for one of the first three units that have essays (Unit 2, 3, or 4). The other three may be from any of the units, including Units 2, 3, or 4. Please note that Unit 13 is your choice of a topic. You may submit more if you wish, but you will be graded only on the first four you submit. The essays should work in references to the unit’s readings and other course material as appropriate. But they should convey your analysis and reflections based on the readings and your own insights, observations and experience. Please submit via the Assignments tool on the course website. Please do not send to me as e-mail attachments.

These four essays are required and will count for one third of the course grade.

Four online discussions. There are online discussions for most of the units but please note that you need to participate in only 4. At least one of the four must be one of the first two units that have discussions (Units 2 and 3). This ensures that everyone gets involved in the discussions early in the course.

For each of the units you select, you need to post at least twice – an original post the first day of the discussion (Wednesday) and at least one more anytime during the discussion. The second post may be another original post, or it may be a response to someone else. More are welcome if you wish. The posts should be based on and reflect the readings but if you wish, please bring in an outside source that adds to the discussion.

You are welcome to participate in any discussion, beyond the four that will count in the grade, if you wish. When you post the first time on Wednesday, those posts will count in the grade. If you would like to participate after that, please post for the first time on Thursday.

Please refer to the document Guidelines for Online Discussions on the course web site, which discusses this in detail.

Your participation in these online discussions is required will count for one third of the course grade.
2. **Research paper on a management or administration topic of interest to you**

Please complete a research paper of approximately 15 - 20 pages (double spaced) on a topic of your choice. It must relate to leadership, management, or administration of information programs and must be approved by me. *It should be on a topic that interests you* and it needs to be precise enough that you can carry out the research in the time available during the semester and handle it in a paper of this length. The paper may cover a topic that is related to your own work situation or career interests. For instance, you might want to do research on a particular information program management issue, a problem you are facing or expect to face, some aspect of management effectiveness, or some model practices or techniques.

The paper must be adequately researched, based primarily on sources beyond those that we are using in the course, well organized, clearly written, carefully proofread, present a clear thesis or argument, include appropriate footnotes in proper form, and include a bibliography that notes sources consulted.

“Suggestions for Research Papers” in the “Files” section of the course web site provides some additional suggestions.

Please send me a research paper proposal by ELMS e-mail by *September 17*. The proposal can be short – a page or less should be enough -- and should address the following:

- Your name
- Title of the topic
- A short description of it (a few sentences), including researchable questions
- Initial list of sources – titles of a few books, journals you expect to consult (you don’t need to cite specific articles for the proposal), web sites, etc. This does not need to be a long list; just enough so that it is clear that a critical mass of source material exists.
- A few sentences on why you are interested in this topic

If you would like to try out some possible ideas before submitting the proposal, please just send me an e-mail with the possibilities that you are considering at least a few days before that deadline. I’ll provide some reactions and suggestions.

The final version of the paper is due by *December 10*. Late papers are not acceptable unless there are extenuating circumstances. If there are, please contact me in advance.

*The paper will count for one third of the grade.*

**Grading**
As noted above, grades will be assigned as follows:

* Unit written assignments 1/3 of grade
* Participating in weekly topic discussions 1/3
* Research paper 1/3


Anne Marie Casey,. "Grassroots Strategic Planning: Involving Library Staff from the Beginning." Journal of Library Administration 55 (May/June 2015), 329-340


Susan Eisner, “Leadership: Gender and Executive Style,” SAM Advanced Management Journal 78 (Winter 2013), 26-41
Julie Gilbert, "Heroes and Holidays: The Status of Diversity Initiatives at Liberal Arts College Libraries," *College & Research Libraries* 77 (July 2016), 520-535


Samantha Hastings, “If Diversity is a Natural State, Why Don’t Our Libraries Mirror the Populations They Serve?,” *Library Quarterly* 85 2015), 133-138


Chr Booth, “Managing Technology Projects,” *Public Services Quarterly*, 5 (January – March 2009), 59-63
