

**University of Southern California  
Leonard Davis School of Gerontology**

**GERO 550: ADMINISTRATION AND SYSTEMS MANAGEMENT  
SPRING, 2018**

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GERO 550 is an introductory, graduate level course designed to give students in the classroom (and online) a broad overview of concepts, issues and approaches related to management of Aging Services. Effective management requires a variety of skills including: self-management; effective communication; capable leadership; team-building; strategic planning; professional networking; and system development. Managing Aging Services well requires the ability to oversee and organize the work of people within an organization—with differing backgrounds, skill levels and expertise—and to relate to key stakeholders outside the organization including consumers, healthcare organizations, community stakeholders, public officials, regulators, and donors.

This course utilizes public and business administration concepts pertinent to Aging Services. Basic assumptions are:

1. *Management matters.* Graduates of the School of Gerontology are likely to work in an organization and will benefit from learning about the administrative, service delivery, bureaucratic and network issues that will confront them.
2. *The age wave is here.* Demographic changes are resulting in increased need for organizations sensitive to the needs and aspirations of older persons.
3. *Think “both/and.”* Most management issues are not simply black or white. Successful managers will tolerate ambiguity and balance conflicting and paradoxical ideas and approaches.
4. *Just do it.* Managers operate with imperfect information and must be able to judge when a program or service is ready to launch. Successful implementation includes understanding what we know and how we know it, *what we don’t know*, and most importantly how to translate what we know into effective programs and services.

5. *Shared goals are essential.* Managers can't do it all themselves; they must guide others, orchestrating and synchronizing their team to meet goals.
6. *Change is inevitable.* Managers navigate in a world of change and must be able to anticipate how public policy will impact Aging Services programs and services.
7. *Managed care is an important partner.* Managers of Aging Services programs and services will increasingly interact with managed healthcare organizations.

The course is broken into four sections:

- **What do managers do? Where do they do it?** — Section 1 provides an overview of the theories, concepts and issues of administration and sets the stage for the materials to follow.
- **How do managers decide what to do?** — Section 2 focuses on planning, goal-setting and decision-making; taking into consideration the older adult consumers being served.
- **What skills and approaches do managers need to lead?** — Section 3 provides information about managing staff, networking, and collaborating with other organizations.
- **How do managers position a program or organization within the broader community?** —Section 4 examines how systems development can be used to enhance the performance of an organization or program and better serve consumers.

### **EXPECTED OUTCOMES**

To do well in the class, students are expected to demonstrate the ability to:

1. Apply relevant concepts and principles to management issues in Aging Services programs and organizations.
2. Describe the role of managers and the skills required to be a competent manager in the Aging Services field.
3. Describe concepts of organizational behavior and analyze and use conceptual methods of working effectively with and through other people.

4. Analyze organizations that serve older adults including organizational goals, environments, and resources.
5. Demonstrate planning skills including: identifying and analyzing key sources of information; determining needs; developing and analyzing alternative strategies; setting priorities; and strategically executing plans.
6. Identify and interpret the agendas of political “actors” within and without an organization and the rules of the game by which they play.
7. Demonstrate the skills required for sound decision-making through analysis and presentation of case studies.
8. Show how skills and concepts are specifically relevant to Aging Services and apply course materials to case scenarios of organizations serving older adults.
9. Demonstrate how to stay abreast of public policy and analyze the impact of policy and regulatory changes on Aging Services.
10. Assess personal growth in management effectiveness throughout the semester and set goals for continued development of their management repertoire.

### **REQUIRED READINGS**

The **required book** for the course is:

- Giordano, J. A. & Rich, T. A. (2001). *The Gerontologist as an Administrator*. Westport, Connecticut: Auburn House.

**Assigned reading** also includes articles available on Blackboard:

- Behn, R. D. (1988). Management by groping along. *Journal of Policy Analysis and Management*, 7(4), 643-663.
- Harvey, J. B. (1974). The Abilene paradox: The management of agreement. *Organizational Dynamics*, 17(1), 17-43.
- Alkema, G. E., Wilber, K. H., & Enguidanos, S. M. (2007). Community and facility based care in J. A. Blackburn and C.N. Dulmus (Eds.) *Handbook of Gerontology: Evidence-based Approaches to Theory, Practice, and Policy* (pp. 455-497). Hoboken, NJ: John Wiley & Sons.

### **PERFORMANCE AND GRADING**

Students are expected to enter the class knowing how to communicate effectively in writing. Previous coursework or experience in administration is not required. Performance in the following areas will be used to determine a student's grade:

<b>Class Participation</b> (Ongoing)	20%
<b>Case Study Memo</b> (Varies by group: 3/6 or 4/3)	20%
<b>Book Review</b> (Book selected by 1/23; Review due by 2/13)	20%
<b>Final Paper</b> (Proposal is 5%, due by 2/20; Paper is 30%, due by 4/24)	35%
<b>Final Paper Presentation</b> (5/8)	05%
	Final Grade: 100%

**Note: All written assignments should be submitted through the designated Blackboard TURNITIN® PORTAL prior to the deadline; if unable to do so or unsure if it went through the portal, e-mail a copy to the instructor prior to the deadline.**

### **ACADEMIC INTEGRITY**

The instructor strictly adheres to the University Student Conduct Codes® established expectations of academic honesty. This means students' work should be submitted with the respect for the intellectual property rights of others; the ideas and wordings of another writer must be acknowledged and appropriately used. Do not use Wikipedia as a reference. Plagiarism is serious student misconduct. If such behavior is found, the instructor has the responsibility to report to the Office of Student Conduct and may apply appropriate sanctions to students who violate principles of academic integrity.

According to SCAMPUS University Governance sections 11.00 and 11.11, plagiarism is the unacknowledged and inappropriate use of others' works. It includes:

- ✓ "The submission of material authored by another person but represented as the student's own work, whether the material is paraphrased or copied in verbatim or near verbatim form;"
- ✓ "The submission of material subjected to editorial revision by another person that results in substantive changes in content or major alteration of writing style;" and
- ✓ "Improper acknowledgement of sources in essays or papers."

**Brickson No Gift Policy.** As much as the instructor appreciates student thoughtfulness and generosity, I do not accept gifts from students—even small amounts of chocolate, however tempting!

## **DISABILITY SERVICES AND PROGRAMS**

A student requesting academic accommodations based on a disability is required to register with Disability Services and Programs (DSP) each semester. A letter of verification for approved accommodations can be obtained from DSP. Deliver the letter to the instructor as early in the semester as possible. Documentation guidelines are available at:

[sait.usc.edu/academicsupport/center\\_programs/dsp/registration/registration\\_howto.html](http://sait.usc.edu/academicsupport/center_programs/dsp/registration/registration_howto.html)

## **EXPECTATIONS AND GRADING SPECIFICS**

**Class Participation:** GERO 550 is a blended class meaning that some students will be in the classroom and some will be taking the class online. Students are expected to participate in discussions and exercises, either face-to-face in the classroom or online. In-class and online participation will be assessed as follows.

**In-class participation** consists of: 1) actively contributing in class and/or online in regular weekly discussions; and 2) actively engaging instructors and guest speakers in question and answer (Q&A) sessions and discussions. Debate and diversity of opinion are encouraged. Each week, discussion questions will be posed about key lessons from the readings. **Students are required to read the weekly assigned readings prior to the lecture that week and actively discuss them in-class.** Each in-class student will also be assigned to one online student partner and asked to bring the online student's comments to the class.

**Online students** are expected to contribute one or more substantive (but brief) posts in response to the weekly discussion questions on Blackboard by Tuesday at noon (Pacific Time). Class participation grades will be assessed on the online student's active participation each week and the quality of participation (i.e., demonstrating a grasp of the reading assignments and articulating a position that is supported by the reading or offers a reasonable and rational argument to the readings).

Online students will also be assigned to one of three ***Discussion Board Groups*** (Group A, B, or C). For three of the eight weeks with reading assignments, members of a *Discussion Board Group* will each post a V-log – a video blog – on Blackboard in response to the assigned readings. Online students who are *not* uploading a V-log that week will post a short editorial response to one of the uploaded V-logs. In total, each online student will post three V-logs and five editorial responses. V-logs and editorial responses are due on Blackboard **by Tuesday at noon.** A tutorial will be posted shortly after Discussion Board Groups are assigned. Students needing assistance in uploading a V-log, should e-mail the Student Assistant. In-class students will not be assigned to a *Discussion Board Group*.

**Case Studies:** The course includes two case studies. Students are expected to read each case carefully and be sufficiently knowledgeable to participate in the discussion. Students are required to write up a memo on one case. Success in the assignment requires thorough reading of the case and applying material from the readings and class discussions to the analysis. The case memo should be heavily referenced with class material (citations are required), use logic, and apply practical solutions. Students are not expected to use outside readings or research beyond what is required in the class. To prepare a case study, see Assignment Details, *Case Study Memo*, pages 12 to 13 below. **NO CASE STUDY MEMOS WILL BE ACCEPTED AFTER THE DUE DATE/TIME.**

**Book Review:** The course includes a Book Review. Students are expected to select one the following books (not read previously) by January 23 and write a brief 750- to 850-word Book Review, due on February 13. The review should describe the focus and content of the book, the student's critique and how it is applicable to an organization that serves older adults. Pick the book carefully. To select a book, consider online reviews, areas of professional interest, and topics relevant to the management of Aging Services. Each of the books will be reviewed with a brief synopsis/discussion on Blackboard. Therefore, if one or two of the books are getting all the traction early on, the book will be closed as an option. The earlier a student signs up the more options will be available.

Select one of the following four books (using the most up-to-date published version) to review and present to the class:

- Catmull, E. & Wallace, A. (2015). *Creativity, Inc.: Overcoming the Unseen Forces That Stand in the Way of True Inspiration.*
- Covey, S. (1989) *The 7 Habits of Highly Effective People.*
- Grant, A. (2013). *Give and Take: A Revolutionary Approach to Success.*
- Laloux, F. (2014). *Reinventing Organizations.* On-line at:  
<http://www.reinventingorganizations.com/>

**Final Paper Proposal and Presentation:** Students are expected to submit a brief proposal for a final paper by February 20. In-class students will present the final paper in class during exam week on May 8. Online students will provide a 3 to 5-minute video for viewing on May 8. The presentation should be organized in a Power Point, include information on what the student did to complete the assignment and what was learned that may be of value and interest to other students. The final written paper will be due by April 24. For more information, see Assignment Details, *Final Paper*, pages 14 to 21.

Students will select the final paper topic from three learning options below and prepare a brief written proposal. Before selecting a learning-option and writing the proposal, students should consider: how the learning option fits with their learning agenda; how practical it would be to complete; and how interesting the learning option is to them professionally.

- **Learning Option 1 - A day in the life (shadowing)** requires the student to observe a manager of an Aging Services organization for eight hours. This assignment is a replication of Mintzberg's work on "What Managers Do."
  - **Proposal requirements:** Provide the name, title and organizational affiliation of the manager selected; an attestation that the manager has agreed to be shadowed; the type of Aging Services organization; and if known, the proposed date(s) the student will be shadowing the manager.
  
- **Learning Option 2 - Organizational analysis** requires the student to provide a detailed study of an organization with which (s)he is familiar. This option requires a great deal of information about the organization and is most appropriate for a student's work site or internship organization.
  - **Proposal requirements:** Provide the organization's name, nature of its business, mission statement and organizational chart; the student's affiliation and role with the organization; the scope of the analysis (i.e., the entire organization or a department, division or section); planned methods of data gathering (specifically what information will be gathered and how it will be obtained); and planned interviews, if any.
  
- **Learning Option 3 - Problem solving** involves working with an organization to address a relevant issue that is of concern to management. This project requires excellent planning and work must begin very early in the semester. It also requires the student to have a relationship with the organization. The final paper will be given to the manager at the conclusion of the course.
  - **Proposal requirements:** Provide the organization's name, nature of its business, mission statement and organizational chart; provide the name and title of a manager who has identified a problem that can benefit from the student's assistance and the date of the interview; describe the problem/issue in great detail including the scope of the problem, how long has it been a problem, how it impacts the organization, how the organization has tried to address the problem, and the criteria for evaluating a proposed solution to a problem.

**COURSE OUTLINE**

**I. COMPLEX ORGANIZATIONS AND THE MANAGERIAL ROLE**

- January 9**    **Introduction:**    **Goals, Objectives, Expectations and Assignments**  
**Major Focus:**    Student's areas of interest, experience and background within organizations  
**Key Question:**    What is your vision of Aging Services?  
**Skill Exercise:**    Techniques for self- management
- January 16**    **Major Focus:**    **The Nature of Complex Organizations**  
**Key Question:**    What are major organizational theories that help explain how Aging Services organizations are designed, how they function and how this affects their delivery of services?  
**Topics:**    Theories of organizational structure, function and roles  
**Task:**    To apply administrative theory to the current status and needs of Aging Services organizations  
**Skill Exercise:**    Apply theory to a relevant Aging Services issue  
**Readings:**    **Readings are to be completed by the date assigned:**  
Giordano & Rich, Chapters 1 & 6
- January 23**    **Major Focus:**    **The Nature of Administrative Work**  
**Key Question:**    What is the role of managers in Aging Services? What do managers do? How can they spend their time strategically?  
**Topics:**    Characteristics of managers, work roles, organizational variations, and skills required  
**Task:**    *DECIDING WHAT TO DO.* To better understand how the environment influences managers' decisions and what skills are required of managers.  
**Readings:**    **Readings are to be completed by the date assigned:**  
Giordano & Rich, Chapter 3  
Alkema, Wilber & Enguidanos, Community and Facility-Based Care, in *Handbook of Gerontology: Evidence-based Approaches to Theory, Practice, and Policy*  
**Assignment:**    Submit a book title for the Book Review to instructor via Blackboard **by 5 pm on January 23** and begin to read book.
- January 30**    **Major Focus:**    **Strategic and Operational Planning**  
**Key Question:**    What are the elements of strategic planning? What are the strategic and operational issues in Aging Services? What



tools do managers use? How can managers stay abreast of public policy and regulatory changes?

Topics:

Planning, working with Boards, consultants, information gathering, getting necessary input, determining who makes the decisions, managing change in a turbulent environment

Readings:

**Readings are to be completed by the date assigned:**

Giordano & Rich, Chapter 11 & 12

Behn, R. D., "Management by Groping Along"

**February 6 Major Focus: Organizational Planning and Decision Making**

Key Question:

What tools does a manager use to make the case for program ideas? How do managers make decisions? What information do they use? What are the different styles of decision-making? What tools are available to assist managers with decision-making? What are the ethical issues that influence managers in Aging Services?

Topics:

Key components of organizational planning. Exercise in strategic planning, information gathering, determining who makes the decisions, consumer directed care, ethical issues in decision making.

Skill Exercise:

Develop a Logic Model

Readings:

**Readings are to be completed by the date assigned:**

Giordano & Rich, Chapters 7 & 13

**III. GETTING OTHERS TO ACT**

**February 13 Major Focus: Communication**

Key Question:

What are the major communication skills required of managers in aging? What concepts underpin these skills? How are these skills acquired and used?

Readings:

**Readings are to be completed by the date assigned:**

Harvey, J. B., "The Abilene Paradox: The management of agreement"

Giordano & Rich, Chapter 5

Assignment:

Submit the final Book Review to Blackboard's Turnitin® **by 10 am on February 13**

**February 20 Major Focus: Organizational Culture, Motivation, and Team Building**

Key Question:

To what extent can the manager motivate employees through an enhanced work environment and the creation of

a positive organizational culture? How does one motivate employees to achieve the highest level of performance? How do these theories relate to programs and services for older adults?

**Topics:** Theories of performance, motivation, incentives and rewards; application to Aging Services through team building in the Program of All-inclusive Care for the Elderly (PACE); the Facility Culture Change Movement

**Readings:** **Readings are to be completed by the date assigned:**  
Giordano & Rich, Chapter 4 & 8

**Assignment:** Submit Final Paper Proposal to Blackboard Turnitin® **by 3 pm on February 20**

**February 27 Major Focus: Managing Conflict, Managing Diversity, Dealing with “isms,” Ethical Issues, and Facing Competing Demands**

**Key Questions:** How do managers work effectively and promote esprit de corps while managing people with differences in work style, personalities, approaches, values, and culture? What are key ethical issues facing Aging Services managers?

**Readings:** **Readings are to be completed by the date assigned:**  
Giordano & Rich, Chapter 10

**March 6 Case Study lolapalooza: Case Study # 1 - Members from Group 1 will apply class discussions and readings in a presentation of *Angel Crest Manor: For Love or Money?***

- Submit Case Study Memos to Blackboard **by 10 AM on March 6:**  
**NO LATE PAPERS WILL BE ACCEPTED**

**March 13 SPRING BREAK—NO CLASS**

**March 20 Major Focus: The Manager as a Leader**

**Key Question:** What are the theories, characteristics, skills and styles of a leader? How does one work effectively with others to achieve organizational goals?

**Topics:** Leadership, follower-ship, power, influence, control and authority, motivating, productivity, and problem solving.

**Simulation:** Leadership Exercise

**Readings:** **Readings are to be completed by the date assigned:**  
Giordano & Rich, Chapter 2 & 9



## **ASSIGNMENT DETAILS**

### ***CASE STUDY MEMO***

The purpose of the case study method is to acquaint the student with the complexity of management and socialize him or her to a flexible, problem-solving approach to management issues. Essentially, while there are a number of theories that can serve as guides, most management problems do not have a specific, easy to identify, best solution. Robert Behn (1988) refers to the necessity of learning to manage by "groping along" because each management task is different, providing new challenges and opportunities. Alan Altshuler (1988) refers to management as a "complex craft . . . with a near-infinite variety of unpredictable circumstances" (665).

The case study approach is well suited to preparing students for the art of managing. Rather than mastering discrete facts, the case study approach forces students to confront conflicting options; juggle organizational, political, ethical, and practical realities; take risks; and make mistakes. In short, it prepares the student for the complexities of managerial work. Case studies should also promote interesting discussion and dynamic interactions between class participants.

Although learning to deal with ambiguity is beneficial, a few guidelines for analyzing the cases are in order. In exploring complexities, case study analysis should be comprehensive, systematic, and rational. Use the following six elements (adapted from authors Infeld & Kress, 1989) as a general outline for issues to be addressed.

1. **Essential background information:** What are the facts of this case? What are the relevant issues? Who are the key players?
2. **What are the issues in this case:** What is at stake? What are the primary problems and their components? If possible, describe these in terms of their priority. How are the problems interrelated? Who controls the solutions? Do the solutions of one problem have implications for other areas? If so what are they and how does this impact the case as a whole? Students are required to support, document, and reference the points with class readings, lectures, and discussions.
3. **What theories are useful in assessing the case? In what way?** This part of the analyses asks the student to remove him or herself from the personalities of the case and to think about the case conceptually. Because a thorough analysis may require supplemental reading and investigation students are encouraged to discuss cases with each other, as well as a practicing Aging Services manager, a friend or roommate, or

anyone else who may provide useful insights. Students are expected to document their case with references from the literature.

4. **What else does the reader need to know and what are strategies for obtaining needed information?** (For example, bring in a consultant, conduct a needs assessment, or develop a budget analysis). Generally, the student will be asked to identify with a specific role in the case, most often the manager.
5. **What can we presume to be the possible courses of action? What are the anticipated consequences (i.e., the benefits and liabilities of each)?**
6. **What is the best course of action** based on the delineated options? Ground the answer in theory and also present logical arguments based on the facts of the case. Include a systematic presentation of the strategies to pursue.

Case Study Memo write-ups should be limited to 1,500 words excluding name, date, and references. Words beyond will be discounted. The following criteria will be used to grade the case. In order to receive a grade of “A” the analysis should be: comprehensive, logical, justified, well-documented, original, innovative, and well-executed.

The following questions (and percent weighting) will be used to assign the student’s grade:

1. **Comprehensive Analysis:** Has the student clearly delineated all of the issues, players, constraints, and consequences or have they focused only on a portion of the case while overlooking critical components? (30%)
2. **Specific, Concrete, and Logical Case Analysis:** Is the students’ presentation of options logical, rational, and specific enough? Does it make sense based on the facts that presented? Does it make sense based on the facts of the case? (20%)
3. **Documentation/Support:** Has the student documented the analysis extensively and correctly with relevant course reading and information from course lectures? (35%)
4. **Execution:** Is the paper is well thought-out, well-organized, well-written, attractive, and grammatically correct? (15%)

## **ASSIGNMENT DETAILS**

### ***FINAL PAPER***

The student has three options to choose from to complete the final assignment. Before making a decision, the student should read over the options and consider how each fit with their learning agenda and how practical each would be to complete. Finally, the student must decide which topic is the most interesting to them. **A student must select one final paper assignment option and prepare a brief proposal to be turned in to Blackboard by February 20.**

#### **Option 1: A Day in the Life Shadowing Project (Mintzberg Replication)**

This assignment requires the student to use a semi-structured observation method to address the question, "What do managers of aging programs and services do?" Students selecting this project to fulfill their final paper assignment should spend eight hours observing an administrator in the work setting. Ideally, the eight hours will be done at times that reflect work that is "typical." In addition to the observations, students are expected to collect some preliminary information on the manager and his/her environment and to debrief the experience with the individual after the observation is complete. Examples will be provided to demonstrate what a comprehensive paper looks like.

#### **Procedures for Conducting Observations**

The following steps should be used to complete the shadowing project:

1. Skim Mintzberg's *Appendix B: Seven Research Methods used to Study Managerial Work* and then carefully read *Appendix C: A Study of the Work of Five Chief Executives*. This is to familiarize the student with the method and how it fits with other qualitative approaches to studying managerial behavior.
2. Decide whether or not to pursue this option and let the instructor know by February 20 in writing. Include in the written proposal the name, title, and organizational affiliation of the manager to be shadowed, an attestation that the manager has agreed, and the organization's service setting (e.g., a community-based organization providing nutrition or multipurpose services, a long-term care setting, or other Aging Services-related environment). If known, please include the planned date(s) for shadowing.
3. After the manager has consented to be observed, obtain background information on

him/her. This will involve a brief interview and includes the following: a resume, an organizational chart, a job description "boilerplate" if (s)he has one, an idea of their work hours, including how much work is done at home, a copy of the manager's calendar for the dates and times observed, and anything else (s)he wishes to share that is relevant to the work and planned observations.

4. Make arrangements for the dates and times to do the shadowing. These hours should be as representative as possible of the work that manager does. For example, don't shadow three Monday mornings in a row or sit through the weekly staff meeting several times. Try to schedule the observations for different times of the day and week. Ask the manager if the work observed is representative and compare the activities to the copied calendar days. Also check with the manager about seasonal variations and other reasons the observations may be typical or atypical. Notify the instructor know if there are scheduling issues.
5. Although Mintzberg tracked activities, it is more useful to address the question of work content. Therefore, rather than using Mintzberg's Categories, tabulate the chronology record according to the list posted on Blackboard and discussed in class.
6. **Include field notes (typed or legibly handwritten) with the Final Paper.** Reliability is a challenge with this project since students will be observing different people. It is therefore extremely important that record keeping is meticulous. Do not make judgments in the narrative. Simply describe as accurately as possible what is observed. For example, do NOT say, "Mr. Jones was extremely irate. He screamed at everyone in sight." Instead, describe the situation like this: "Mr. Jones slammed his fist on the table and said, 'I'm tired of all these damn late reports. Either get them in on time or I don't want to see them.' His face appeared flushed. The staff was silent. After 30 seconds, Mr. Jones cleared his throat and asked that they move on to the next item on the agenda, new business."
7. After completing the eight hours of observation, arrange a session with the manager to debrief. Ask how typical the work was. If there is something that was not understood, check it out. (In most instances it will be appropriate to ask, "what was that phone call about" or "was that a scheduled meeting?") Also use the debriefing to get clarity on the job role and to answer additional questions on issues such as perceived style, time-management techniques, and other topics that will be addressed in the Final Paper. The following provides a Sample Interview:
  - Was the work I observed typical of your normal activities? Why or why not?

- Which activities do you most enjoy? Which do you least enjoy? Why?
  - Where do you feel most competent? Where do you feel least competent?
  - What are the underlying values of this organization?
  - How would you characterize your management style?
  - How do you organize your work?
  - How do you set your priorities?
  - In your opinion, what skills and/or knowledge are most important for a manager of Aging Services?
  - Do you have any questions for me?
  - Thank the manager for his or her time.
8. In addition to field notes, the student will be expected to write a brief analysis of their observations. This analysis should be up to 10-typed pages. It should address the following questions:
- a. What roles (according to Mintzberg) do you feel you observed? Are there other roles you observed that do not fit into Mintzberg's framework?
  - b. How do your observations apply to readings and class sessions? For example:
    - i. What type of organization is this (bureaucratic, matrix, etc.)?
    - ii. Did you observe planning activities? If so at what level?
    - iii. What are the values and assumptions of the organization? (organizational culture). How are these promoted?
    - iv. How does the manager communicate? Apply information from the class on communication, team building, and motivation.
    - v. How does the manager deal with problems? How does (s)he handle conflict?
    - vi. What aspects of leadership did you observe?
    - vii. Were there opportunities to observe networking and external relationships?
    - viii. Are there other specific areas that you observed? How would you apply the lessons learned in this project?
  - c. Comment on your perceptions of the manager's workload. Is there any evidence of stress or work overload? If so, how is it dealt with?
  - d. Compared to Mintzberg's findings, is there anything idiosyncratic about the manager's roles or work that you observed? Please explain. If yes, how do you think this relates to the fact that the manager is working in Aging Services?



In many instances, a student will not have examples for each question. If this is the case, a student should simply state that in the paper. For example, "I did not observe any conflict situations during the shadowing."

9. The student should document their findings using the literature, class sessions, and class discussion, and use parenthetical references to identify sources. The Final Paper is due **by April 24 at 5 pm**. Papers that are not in on time will automatically receive a deduction of five points. Starting **April 25**, an additional 2 points will be subtracted for each day the paper is late. In-class students will make a brief presentation to the class **on May 8**. Online students will provide a 3 to 5-minute video presentation for viewing.
10. Remember, as a professional courtesy, to send a written thank you note as a follow-up.

### Grading Criteria

The A Day in the Life Shadowing Project will be graded as follows:

1. *Following procedures accurately.* This means accomplishing all the tasks outlined above in an appropriate fashion (e.g, getting proper background information, using proper procedure to set up the shadowing, etc.)? Does the 10-page typed paper include an analysis of the observed activities and time spent in activities? Have field notes (typed or hand written if legible) been attached to the paper?
2. *Properly recording findings according to the format outlined above.* This includes writing descriptive rather than evaluative narrative. It also means recording observations in detail. Minutia may be important. When in doubt, write it down!
3. *Analyzing findings according to the questions posed above.* This includes accurately documenting the analysis by referring back to examples observed and tying these to relevant literature. Be sure to reference literature from the class readings and class sessions to support key points
4. *Writing and execution.* Writing and execution will be graded according to the quality of writing, the use of logical arguments to back-up assertions and the extent to which the writing is clear and in the student's own words.
5. *Final paper presentation.* Five percent of the overall course grade will be based on a 3 to 5-minute oral (in-class students) or video (online students) presentation to the class, organized in a Power Point. The student will be graded on both content and style of presenting.

## **Option 2: Organizational Analysis**

This major assignment requires the student to conduct an analysis of an organization (in some instances this may be done as part of an internship) using concepts and theories presented in class. The structural requirements for the paper, expected content, and grading criteria are described below.

### **Structure**

The paper should be succinct (no longer than 5,000 words) and use American Psychological Association (APA) style references. It must include a one-page Executive Summary, which highlights key findings. Sources should be documented including organizational literature (brochures, manuals, etc.) and personal communications.

### **Content Outline**

The following content outline provides a guide for the paper:

1. Overview: Describe the purpose of the organization. What are its mandates and where do they come from? Whose auspices is the organization under? What is the history of the organization? How was it founded? Who are its constituents? Who funds it? What other organizations does it relate to?
2. Structure: Describe the method of operation of the organization by providing a comprehensive and analytical discussion of the organizational theories that best describe the organization. What type of organization is being analyzed? What is its structure? (Include an organizational chart). What are the formal policies and procedures (if there are any)? What is its structure of governance and representation?
3. Behavior: How does the organization regulate its employees? How does it deal with problems? What are its decision-making mechanisms? What are the administrative roles in the organization and who occupies them, what activities do these administrators and managers carry out and what are the requirements for education and training of administrative staff? Describe the informal organization. What are the organizational climate, norms, and communications patterns? (If possible, include both formal and informal communication patterns.) How is the staff motivated (by what means and by whom)? What is the reward system and how is it used? What are the opportunities for upward mobility? How does one get ahead? How does the agency input get from the outside?

4. Planning and Evaluation: How does the organization plan? How far does it look into the future? How does it evaluate success or failure and how do others evaluate the organization? On the basis of what kind of information and data is the organization evaluated? What kinds of information does the organization collect for its own uses?
5. The Environment: How does the organization attract clients and position itself in its market? What kinds of competition, if any, does it face? What types of coordination strategies does the organization engage in? In what kind of networks is the organization involved?
6. Major Issues: What are the major issues that the organization is currently wrestling with? Are there controversies? Are there internal or external struggles? If so, what is their nature and how does the organization go about resolving them?
7. Assessment: How effective is this organization? What does it do well? Where are their problems? If you were in charge, what goals would you see as priorities for the organization in terms of its future? What changes would you make and why? Finally, would you seek a job in this organization? Why or why not?
8. The Final Paper is due on **April 24 by 5:00 pm**. A deduction of 5 points will be made for late papers and starting on **April 25**, an additional two points will be taken off for late papers. In-class students will make a brief presentation to the class **on May 8**. Online students will provide a 3 to 5-minute video presentation for viewing.

### **Grading Criteria**

The following questions will serve as a guide for grading:

1. *Comprehensiveness of response*. How well and how thoroughly are the points covered?
2. *Appropriate integration of concepts from the readings and class to document key points*. Are theories/concepts from the reading and those discussed in class used appropriately?
3. *Execution*. Is the paper well thought out? Is it well written? Does it look presentable? Is the paper within the guidelines in terms of length? Is there an Executive Summary and content?

4. *Comprehensiveness and organizational investigation.* Is there adequate background? Does the paper sufficiently explore the organization? Does the paper appear to accurately reflect reality?
  
5. *Final paper presentation.* Five percent of the overall course grade will be based on a 3 to 5-minute oral (in-class students) or video (online students) presentation to the class, organized in a Power Point. The student will be graded on both content and style of presenting.

### **Option 3: Problem Solving Assignment**

This assignment will expose students to problems that managers in Aging Services organizations confront. The first part of the assignment requires an interview with a manager of an Aging Services organization. The organization may be public or private, for-profit or non-profit but it must target older adults. Students are expected to arrange an interview with the manager by late-January. The purpose of the interview is to identify a problem/issue that the manager needs assistance in solving. The student must address this issue/problem in their final paper. In fact, the student may identify more than one issue and then choose the one that is most compelling. The student should research the problem, incorporate state-of-the-art thinking, formulate a solution to the problem, submit a final paper, present findings in class, make necessary adjustments based on the class discussion, and then, present recommendations to the manager.

**Part 1: Problem Statement Proposal.** This is part of the assignment (the Final Paper Proposal) and should be about three to five pages. It is due February 20. In it, the student should describe the problem/issue in much detail. What is the scope of the problem? How long has it been a problem? What impact has it had on the organization? What has been tried to address it? To what extent have these efforts affected the issue? What would be most useful to the manager in terms of your efforts? How will the manager evaluate the students' efforts? Does the manager have suggestions about where to begin or what literature to search?

**Part 2: Strategy Proposal.** The paper should include the following components:

1. **Abstract:** Include all the relevant points in a brief abstract, not to exceed 500 words that the busy executive can use to get the gist of the issue and the proposal.
  
2. **Background:** What is the nature of the problem? Why is it a problem? For whom is it a problem? What is its impact?

3. **Literature:** What does the literature say about the issue? For example, if exploring how to improve retention of CNAs, what studies have been done that inform the issue? What is known? How helpful are the studies? Why? Conclude this section with a summary of what is known, including areas of consensus and areas of dispute.
4. **Recommended Strategy:** Include a memo that recommends the most viable and preferred strategy or approach or steps to address the issue with the reason why it is likely to be effective. Use knowledge of the issue from you interview with the manager and expertise from the literature. (Also, apply concepts and evidence from the class readings and class sessions and reference these in the paper.)

**Papers are due on April 24.** A deduction of 5 points will be made for late papers and starting **April 25**, an additional 2 points will be subtracted for each day the paper is late. In-class students will make a brief presentation to the class **on May 8**. Online students will provide a 3 to 5-minute video presentation for viewing. This presentation can serve as a practice-run or “shake down” for a final presentation to the manager.

### **Grading Criteria**

The following questions will serve as a guide for grading:

1. *Comprehensiveness of response.* Is the analysis comprehensive? Are the issues, approaches or consequences clearly delineated?
2. *Logic.* Is the presentation of options logical and rational? Does it make sense based on the facts presented? Does it make sense based on the problem?
3. *Appropriate integration of concepts.* Does the paper illustrate a good working knowledge of the literature? Is relevant literature, including class readings, used?
4. *Innovation.* Is the analysis innovative? Does the student take risks and present unique insights? Does the student look at the facts in new ways that may not be immediately suggested from the material? Is the solution viable and practical?
5. *Execution.* Is the paper well thought-out, well written, attractive, and grammatically correct?
6. *Final paper presentation.* Five percent of the overall course grade will be based on a 3 to 5-minute oral (in-class students) or video (online students) presentation to the class, organized in a Power Point. The student will be graded on both content and style of presenting.