University of Pennsylvania
School of Social Policy and Practice

Social Work 718: Advanced Social Work Macro Practice II

Course Purpose
Building on students' first year learning, this is the second half of a two-semester course focusing on the acquisition of advanced macro practice skills and the further development of a professional self. Macro practice is composed of three interrelated approaches to change: community organization/development, policy and planning, and administration/management. Activities associated with these modes of intervention include: organizing and mobilizing communities, working with coalitions and taskforces, planning and implementing needs/assets assessments, developing programs and policy strategies, advocacy and social action, and managing an organization – its programs, finances, and human resources.

The objectives of the course are to: (1) understand the context of macro practice; (2) learn about organizational structure with a focus on nonprofits; and (3) study program design and development.

The course is designed to provide theoretical frameworks for macro practice and guidance in the application to real world experiences. In-class case studies and exercises, students' fieldwork, and various assignments are used to advance students' learning. Readings are related to the theories, concepts, and practice skills involved in designing interventions at the mezzo-macro level and in working effectively with organizations. Some class time will be devoted to the discussion of issues raised by students' experiences in the field – in the context of the theories, concepts, and skills under discussion.

Course Requirements
Students are expected to attend *all* classes, be prepared to discuss assigned readings, and participate fully in class exercises and small work groups. Attendance will be taken at the beginning of each class. Instructors are to be advised in advance of anticipated absences and students are expected to complete alternative assignments.

Statement on Academic Integrity
Students are expected to conduct themselves consistent with the University of Pennsylvania's Code of Academic Integrity which presents standards regarding plagiarism, multiple submissions and other actions. Students are expected to be familiar with the Code which can be found at http://www.upenn.edu/academicintegrity/.

Electronic Communication
This course uses Canvas (https://courseweb.library.upenn.edu). Please check this website frequently as all announcements, assignments, lecture notes, additional readings, etc. will be posted here. In addition to Canvas, email is the primary means of communication. It is important that you check your Penn email account regularly. If you do not use your Penn email

address as your primary account, please arrange to have Penn email forwarded to your preferred account.

Grading Policy and Assignments

Written assignments are due at the beginning of class on the date indicated via hardcopy. Assignments will be evaluated based on their completeness, the quality of the work, the clarity of expression and the use of the literature to support the analysis. **Papers must be typed in 12-point Times New Roman or Arial font, double-spaced with one inch margins, and utilize APA format.**

In addition to the classroom work, students are expected to successfully complete a practicum, which is designed to allow the application of theories and the development of advanced practice skills. Students are expected to be at their practicum three days per week. Students are required to have professional supervision by an MSW supervisor either in the placement setting or through the integrative seminar which is provided by the SP2. Passage of this course requires a satisfactory or better evaluation from the practicum instructor. The practice instructor will monitor progress in the practicum directly or with a field liaison.

Late Assignments-Instructors are free to adopt this policy to suit their own needs as long as the amendments do not conflict with the SP2 handbook which can be found on our website.
Late assignments are strongly discouraged. In case of a dire, life-threatening emergency, a late assignment may be accepted *at the discretion of the instructor*. If permission for late submission is *not granted before breaking a deadline*, the grade will be reduced 10%, and another 10% reduction will occur each day (including weekends) that the assignment is late, starting with the day following the original due date. Please note that technical difficulties are not an acceptable excuse for turning in an assignment late.

References & Writing
APA style, 6th edition should be used for references and writing. The best reference is the *Publication Manual of the American Psychological Association, Sixth Edition (2010)*. The following web sites provide additional information:
http://www.apastyle.org/apa-style-help.aspx
http://owl.english.purdue.edu/owl/resource/560/02/ (see links on the menu on the left)
http://ssw.unc.edu/files/web/pdf/APA_Quick_Reference_Guide.pdf

Discussion of Field Placement Issues
Class discussion of field placement issues will take place on an *as needed* basis. Students should email the instructor *& field liaison* if/when they have an issue they would like to address in class, and time will be provided in the next available class session to do this. Bringing an issue for discussion to the attention of the instructor & field liaison is strongly encouraged; however, it is not required. The intent of this process is not to deter students from raising issues, rather, to make sure that valuable class time is not set aside when students do not feel they have something of value that they want to discuss with the class.

Required Texts & Materials   (Available at the Penn Bookstore).

Royse, D., Thyer, B.A., & Padgett, D. (2016). Program Evaluation: An Introduction to an evidence based approach. 6ᵗʰ Edition.

Additional required readings (indicated with a # sign throughout the syllabus) will be posted on the Canvas Site at https://courseweb.library.upenn.edu/

Podcasts: Throughout the semester listening to podcasts are either required or offered as a supplement to the readings. You can either download the podcast through an app on your smartphone and listen at anytime as you are commuting/moving through your day, or you can download via the hyperlink the syllabus and/or on the Canvas site and stream it through your computer.

Supplementary Materials: Many sessions include supplementary materials that are not required readings. These were curated for your use and will likely be of assistance when you are either in your field placement or post-graduation. Students are strongly advised to download these materials and save them! When you are practicing in the field and responding to a RFP they can be quite useful.

Final Grade
The Final Grade reflects the extent to which each student has incorporated the knowledge, values and skills of macro practice in her/his assignments and class participation, thereby meeting course objectives. The final course grade is based on the student's performance in both class and field placement. Evaluation of the classroom component of a student's performance is based on the following:

Attendance and class participation – 10%
Letter of intent – 15%
Grant proposal stage 1 30%
Grant proposal final 40%
Weekly reading reflections – 5%

ASSIGNMENTS: DUE DATES (Faculty discretion)

(A) Learning Contract (Ungraded but required)- Due week 4

This agreement is designed to help students in **consultation** with their field instructor conceptualize and evaluate their educational objectives for the academic year. It involves the development, **with your field instructor,** of a learning contract for your field placement. This contract should include:
- Your learning goals for the year in terms of knowledge and skill
- Specified, measurable outcomes for each of these goals

- Identification of specific steps (tasks and/or projects) to be undertaken to ensure that each goal is met (process objectives) and incremental markers by which your progress will be measured.

Student, field instructor and classroom instructor/liaison must review and sign the contract and each should keep a copy. This contract will be used during field visits and at the end of each semester to assess your progress.

(B) Reflective Writing on Assigned Reading—These are Pass/Fail. No Letter Grade

Due: Start of each class for Session 2 (Theory U/Revolution); 3 (Formal/Informal Culture); 7 (Focus on one Abramovitz).

For each week's assigned reading, you will complete a *reflective free writing assignment* on *at least* one of the readings. You are to write something about one of the readings, and submit this at the start of the next class. You can write about what you feel is the key concept, or concepts, along with what you do not understand about the concept or wish you knew more about. "Free writing" is meant to emphasize that you are not being asked to worry about the details of grammar, spelling, capitalization, and sentence structure in what you write, but rather to let ideas flow freely from mind to paper. Unless your handwriting is illegible, you are welcome to submit these assignments hand-written, or typed. You will be graded on the following criteria:
   a) Timely submission
   b) Providing evidence that you read the article(s) you discuss
   c) Demonstrating ability to think critically about the article (this can include pointing out parts you disagreed with, providing an illustration from your field placement or previous work experience which relates to a reading concept, comparing the views of two articles)
   d) You are only required to reference one of the articles/readings assigned for the week, BUT providing evidence that you read multiple assigned readings may result in a higher grade.

C. Grant Proposal

Over the course of the semester, each student will examine a social problem in their field placement agency or the community it serves and engage in a social planning process to develop a program responsive to that problem/need. This planning process will culminate in the development of a grant proposal.

The purposes of these assignments are:
(1) to provide you with the opportunity to identify an unmet service need in an actual service setting, to conceptualize that need, and to translate your ideas into a living, feasible program concept;
(2) to allow you to experience and study first-hand the range of choices, as well as their real-life implications, associated with development of various program components. For example, if your program involves HIV testing and counseling, you will be faced with the experiences involved in making choices about how to provide testing, how to decide on the nature of the counseling that is offered, and how to protect client privacy; and

(3) to provide practice in proposal writing.

In sum, when you complete this assignment you will have a substantial introduction to (1) program design and development and (2) proposal preparation and writing.
In order to provide students with comments and suggestions on their proposals while they are under development, and in order to simulate the proposal development process as accurately as possible, students must adhere to the deadlines listed below.

Assignment #1: Letter of Intent – Due week 7

This letter should present your ideas for the project. The letter of intent should be addressed to a specific funder that you have identified and include, in brief, the following: statement of need or problem description, project description, goal of the project, and amount requested. You should also say something about your agency's capacity and ability to conduct this program. Submit the letter on agency letterhead using proper formatting (e.g. address, salutation, etc.). It should be no more than 2 pages (single-spaced) using no smaller than 11-pt font. Include with your letter of intent a description of the funder you have selected and their funding priorities & guidelines. You can simply print these from the funder's website (just be sure that the funder's website is clearly provided on the printouts).

Resources for Finding Grants/Funding
- The Foundation Center's Foundation Finder:
  http://foundationcenter.org/findfunders/foundfinder/
- Main Branch of the Free Library – Branch Office of the Foundation Center
- Delaware Valley Grantmakers: http://www.dvg.org/
- Grants.gov (Government issued RFPs)
- Talk to your field instructors and others at your agency to get ideas for possible funders

Assignment #2: First Stage Grant Proposal –Due week 10

The actual grant proposal will be completed over two stages. You will complete the elements (listed below) required for the first stage (Assignment #2) and submit this for review and grading. You will then be required to incorporate feedback from this first stage into the final full proposal. Thus for Assignment #3 you will hand in a full proposal (all as one document), with Assignment #2 elements revised and all the additional elements included. The final full grant proposal must adhere to the total page limits.

Note that the sections below are numbered based on their order in the final proposal document. Please be sure to follow this order when you put your final document together.

For Assignment 2 you must include:
3. Introduction/Agency Background and Capability (1-1.25 pg.)

In this section you will highlight the agency's credibility/expertise in the area covered by the proposal. Credibility can be established by referring to the agency's history, its past efforts in the problem area, its funding history, its adherence to standards, its accreditation status, membership in national and local organizations, etc. In this section you will describe the work of your agency addressing each of the following:

➤ A brief description of significant events in the agency's history.
➤ Statement of the mission, goals and philosophy of the organization.
➤ The population that your agency serves, including geographic location, socioeconomic status, race, ethnicity, gender, sexual orientation, age, physical ability and language.
➤ Prior and current programs and activities. Emphasize the accomplishments and achievements of the recent past.
➤ Qualifications of agency staff. Number of paid full-time staff, number of paid part time staff; number of volunteers.

And where applicable:

➤ Your agency or organization's relationships (both formal and informal) with other organizations working to meet the same needs or providing similar services, and how you are unique or differ.
➤ Positive results from program evaluations that indicate the quality of your agency's work.
➤ Quotes from letters of support from clients, experts, public figures, other funders, etc.
➤ Important agency publications.
➤ Credibility of any collaborating agencies.

4. Need or Problem Statement (3-3.5 pg.)

In this section you are trying to convince the reader that the problem/condition is important for society. Identify the need or problem. What are the critical consequences of this problem and why should society care about it? Literature from the relevant field of practice must be cited to establish the problem's significance (e.g., if the problem has been identified as the difficulties encountered by employees facing retirement, literature on retirement problems, life transitions, etc. should be cited). Remember, assertion will get you nowhere in terms of funding, you always want to provide support/evidence to back-up your argument/points. Sources of information can include professional journals, government reports, legitimate agency reports and/or data sources. Always be very careful about using information from the Internet. It must be from a widely recognized reputable source.

Address the following:

• Community to be served or target population
• Nature and extent of the problem (incidence and prevalence rates, who it affects, etc.)
• Factors contributing to the problem
• Impact of the problem (what are the potential consequences if we do nothing about the problem)
• Promising evidence-based approaches for improved results (results of intervention, program evaluations, etc.)

5. Project Goals and Objectives (1-1.5 pg.)

Clearly identify your overarching goals and specific/measurable process and outcome objectives. The outcome objectives indicate the impact that you expect to have on the client

group. The process objectives will help to describe what will be done to achieve these outcomes.

11. Reference list (in Appendix, not part of proposal page length)
        The proposal must have at least **7 substantive citations**, which refer to the client need or problem which the proposal is addressing and/or other published efforts to respond to that need,/problem (model programs, best practices, evaluations, policy papers, etc.) APA style should be followed for this assignment. The reference list should be provided as an appendix.

Assignment #3: Final Stage Grant Proposal-Due week 14

1. Cover letter (1 pg.) – on agency letterhead stating concisely who the agency is and its mission, what you are requesting funds for, and contact information. (Not included in proposal page length; this should be at the front of the full proposal document when submitted.)

2. Title Page (no more than .5 pg, but not part of proposal page length) This should be inserted immediately after the cover letter and includes the title of the project, a one paragraph executive summary or abstract, and the amount of funding requested

3. Introduction/Agency Background and Capability (1-1.25 pg.) – see above

4. Need or Problem Statement (3-3.5 pg.) – see above

5. Project Goals and Objectives (1-1.5 pg.) – see above

6. Implementation Plan (program narrative, scope, timeframes) (3-3.5 pg.)
The Implementation Plan is the "nuts and bolts" of your proposal. It provides a clear account of what you plan to do, who will do it, and the time frames involved. It presents an action plan that indicates how the goals and objectives will be achieved. Remember to address outcome and process objectives in this section. The implementation plan should link directly to the objectives. What activities will be done to achieve the objectives? What is the service definition? What will this program entail? How will it be organized?

  ➢ Describe whether this project is a new or ongoing part of your organization.
  ➢ Describe the specific activities/strategies to be taken to achieve desired ends. What you plan to do and achieve has to be aligned with your description of the problem and your goals/objectives. **Be specific – do not generalize!**
  ➢ Provide sequencing and timing of the activities that will occur (a timeline is required in the appendix detailing the activities – see #10 below).
  ➢ Describe the proposed staffing needed for the project (titles and roles of key staff/directors)
  ➢ Describe any consultants who will be involved in the program; discuss their qualifications and contributions.
  ➢ Describe how the program contributes to your organization's overall mission.
  ➢ Remember it's all in the details - state what you plan to do, who will do it, and when it will be done.

7. Evaluation Plan (1-1.5 pg)

Specify the evaluation plan and process. What means will be utilized to gather relevant information in a systematic manner? What information will be gathered? What is the evaluation's timetable? How will you determine the program's impact/effectiveness (outcome evaluation)? How will you measure key constructs from your objectives? What data collection instruments will be used? How will they be administered (e.g., pre-test, post-test; follow-up interviews)? When will information be collected? (Sample evaluation instruments and data collection instruments can be appended.) How will the data be analyzed and reported?

What criteria/indicators will you use to measure program output and outcomes? What are the expected levels of goal attainment against which the program's performance and effectiveness will be measured? (E.g., statements such as "it is expected that 75% of the clients will complete training [program's product or output]; 50% of those who complete training will get a job within two months [outcome].") Why were these criteria established? (Is there evidence to support the criteria?)

8. Sustainability and Future Funding Plans (one paragraph)

State how you plan to sustain the program once the grant has expired. For example, will the program be self-supporting from client fees? If you are requesting a one-shot grant for a particular activity (e.g., a conference) and you need no future funding, say so.

9. Conclusion (one paragraph)

Summarize briefly and highlight the significance of this proposed project.

Appendices (not included in page count)

10. Timeline

Using a Gantt-type chart, project the timetable for the program's development, implementation, evaluation, etc. Specify projected dates or times for achieving process objectives/activity. Typical activities that appear in flowcharts include: staff recruitment, training, preparation of program components, publicity, client recruitment, service delivery, service completion, program evaluation, etc.

11. Budget (include a Budget Table and a Budget Narrative that explains or justifies the expenses)

Provide a detailed line-item budget as an appendix. If budget information is unavailable from the agency, estimates can be used. In addition to the **expenses**, remember to indicate any **revenue** already committed to the project and any pending requests to other funders. The budget narrative is where you clarify and explain your proposed budget. What resources are needed to design and implement the program? Specify the costs involved and how you arrived at the particular line-item expenses. Costs/expenses should be linked to the program elements specified above (e.g. why are you asking for a new computer).

12. Reference list – see above

13. Support documentation *(optional)*

The following documents **can** be provided in the appendix in addition, in order to establish credibility for this proposal:
- letters of endorsement,
- letter(s) of agreement from provider agencies,

- staff credentials, and qualifications, resumes, etc.
- list of Board of Directors, with their affiliations

(Details on these components of a proposal can be found in Coley and Scheinberg, *Proposal Writing*, and will be discussed in detail in class.) Proposal review criteria are listed below.

The complete final proposal should be presented effectively in **12 pages** (typed in 12 pt. Times New Roman or Arial font with one inch margins, double-spaced, using APA format). Appendices can be attached to the proposal; they do not count in the proposal's length. Do not put anything in the appendices that is essential to the proposal.
 If the proposal narrative is more than 12 pages, 1 full grade will be deducted.

SECTION I: ORGANIZATIONAL CULTURE

Session 1 Theory U, Scharmer, O.
Introduction- Chapter 2.
Kivel, P. Social Service or Social Change? In The Revolution Will not Be Funded: Beyond the Non-Profit Industrial Complex

Session 2 Theory U, Scharmer, O.
Chapter 4- Chapter 5.
Kivel, P. Social Service or Social Change? In The Revolution Will not Be Funded: Beyond the Non-Profit Industrial Complex

Session 3 Formal/Informal Culture
Topics:
1. Organizational structures/ types of organizations promoting social change
2. Formal/explicit organizational norms and structure
3. Informal/implicit/unstated organizational norms and structure

Students Choose 2:

#Netting, F. E., Kettner, P., McMutry, and S. L., (2004). *Social Work: Macro Practice*.   Boston: Allyn-Bacon.   Chapter 7: Understanding organizations

#Gibelman, M. (2000). Structural and fiscal characteristics of social service agencies. In Patti, R.J. (ed.) The Handbook of Social Welfare Management. Thousand Oaks, CA: Sage. (107-125).

#Schein, E.H. (2004). Defining Organizational Culture. In *Organizational Culture and Leadership*. San Francisco, CA: Jossey-Bass Publishers.

Students choose 1:

#Greene, M. (2007). Beyond diversity and multiculturalism. Towards the development of anti-racist institutions and leaders. *Journal for Nonprofit Management,   Support Center for Nonprofit Management*, 9-17.

-OR-

#Bell, M., Ozbilgin, M., Beauregard, T. & Surgevil, O. (2011) Voice, silence and diversity in 21st century organizations: Strategies for inclusion of gay, lesbian, bisexual   and transgender employees. *Human Resource Management*, 50 (1) 131-46

SECTION II: AUSPICES & FUNDING

Session 4 Auspices & Legal Foundations

Munshi, S., & Willse, C. Forward- In The Revolution Will not Be Funded: Beyond the   Non-Profit Industrial Complex

Hopkins, B. R. (2004). . *Starting and Managing a Nonprofit Organization: A legal   guide.* 4th Ed. New York: John Wiley & Sons (pp 1-37: 281-313).
    Chapter 2: Getting started
    Chapter 3: Debunking some myths and misperceptions

#Brueggemann, W. (2014). *The Practice of Macro Social Work*. Belmont, CA: Brooks/Cole. Chapter 11: Creating new social organizations
    (focus on p 323 – p 333)

#Sosin, M. R. (1987). Private social agencies: auspices, source of funds, and problems covered. *Social Work Research and Abstracts*. 23(2), 21-27.

(Online) Nonprofit Finance Fund 2014 State of the Nonprofit Sector Survey Results
    http://nonprofitfinancefund.org/files/docs/2014/2014survey_natl_summary.pdf

Session 5 Funding & Grant Proposals

Topics:
    1. How nonprofits are funded – types of funding
    2. How funding sources are identified
    3. Introduction to grant proposals
    4. Letters of inquiry

5.
EPAS Standard: 2.1.3

Coley, S. M. & Scheinberg, C. A. (2008). *Proposal Writing: Effective Grantsmanship (3rd Edition).* Newbury Park, CA: Sage Publications. Chapters 1-5

Guilloud, S. & Cordery, W. Fundraising is not a dirty word: Community-Based Economic Strategies for the Long Haul. Page 107. In The Revolution Will not Be Funded: Beyond the Non-Profit Industrial Complex

Session 6 Program Evaluation & Design
Topics:
  1. Introduction to Program Evaluation
  2. Ethical Issues
  3. Introduction to Logic Models
Royse, Thyer, & Padgett:
              Chapter 1: Intro & Importance of Program Eval
              Chapter 2: Ethical Issues
              Chapter 5:Formative and Process Evaluation. **Only pages on logic models approx. page 108-110.**
             * page numbers will vary with book edition.

Skloot, R. (2010). *The Immortal Life of Henrietta Lacks*. New York, NY: Crown. (Excerpts).

#Kellogg Logic Model Guide. Faculty discretion. Most find the first five pages to be the most useful. Students are strongly advised to at least download and save for future use post-graduation. Some RFPs will specifically request applicants to follow formats out of this guide, but there are more options here than can be covered in a single course.

Supplemental: Podcast- Rebecca Skloot, Henrietta's Cells. RadioLab.
 http://www.radiolab.org/story/91716-henriettas-tumor/

Session 7 Program Evaluation: Formative & Process

Topics:
  1. Current landscape of privatization, financialization, and evaluation
  2. Building Logic Models (contd. from prior week if need be).
  3. Formative and Process Evaluation Options
  4. Outcomes, inputs, outputs.

Royse, Thyer, & Padgett: Chapter 5: Formative and Process Evaluation

#Grinnell, R.M., Gabor, P.A., Unrau, Y.A. (2010). *Program Evaluation for Social Workers (5th Edition).* Appendix A: Constructing logic models

#Abramovitz, M. & Zelnick, J. (2015). Privatization in the Human Services: Implications for direct   practice. *Clinical Social Work Journal.* *focus on managerialism and performance tracking   sections.

-OR-

#Abramovitz, M. & Zelnick, J. (2015). Privatization and the Non-Profits: The View of New Public
       Management from the Front Lines. Swiss Association for Social Work.
*focus on managerialism and performance tracking sections.

Supplemental:
       Coley, S. M. & Scheinberg, C. A. (2008). *Proposal Writing: Effective   Grantsmanship (3rd Edition).*   Newbury Park, CA: Sage Publications. Chapter 6   Writing goals, objectives and implementation plan.

Session 8 Group Research Designs: Outcome Evaluation
Topics:
   1. Group Designs Introduction
   2. Outcome Evaluation Designs
   3. General Principles of GRD.

Royse, Thyer, & Padgett: Chapter 9: Group Research Designs. *focus only required on   the first half of chapter. Faculty discretion for the remainder.

Supplemental:

#Grinnell, R.M., Gabor, P.A., Unrau, Y.A. (2010). *Program Evaluation for Social Workers (5th Edition).* New York: Oxford University Press. Chapters 6 & 7

Coley, S. M. & Scheinberg, C. A. (2008). *Proposal Writing: Effective Grantsmanship (3rd Edition).* Newbury Park, CA: Sage Publications. Chapter 7

Session 9   Implementation & Timeline

Topics:
   1.   Program implementation – challenges and opportunities
   2.   Creating a timeline for implementation
EPAS Standard: 2.1.6, 2.1.9

CHOOSE TWO
Coley, S. M. & Scheinberg, C. A. (2008). *Proposal Writing: Effective Grantsmanship (3rd Edition).* Newbury Park, CA: Sage Publications. Chapters 5 and 6. (REVIEW)

#Netting, F.E., Kettner, P.M., McMurtry, S.L., Thomas, M.L. *Social Work Macro Practice*
    5th Edition . Pearson
        Chapter 11: Planning, implementing, monitoring, and evaluating the   intervention (focus on pp 375-394).

#Nair, M.D. and Guerrero, E.G. (2014). *Evidence Based Macro Practice in Social Work*.
        Wheaton, IL: Gregory Publishing Company. Chapter 16: Implementing achievable plans

Session 10 Program Design & Preparing Grant Proposals Workshop

(Note: Students should come with their proposal materials and be prepared to work on their proposals during the class period.)

Topics:
1. Proposal writing as an art and a science
2. The proposal as part of a process
3. Step-by-step review of how to write a grant proposal (workshop format - students will work on the development of their proposal for final assignment)
EPAS Standard: 2.1.3

#Benjamin, L.M. & Campbell D.C (2014) Programs aren't everything. *Stanford Social
        Innovation Review* (Spring 2014).

#Shore, B., Hammond, D. & Celep, A. (2013) When good is not good enough. *Stanford Social Innovation Review* (Fall 2013).

#Berger, K., Penna, R.M., & Goldberg, S.H. (2010) The battle for the soul of the
        nonprofit sector. *Philadelphia Social Innovations Journal* (May 2010).

Supplemental:
Aspen Institute Planning Tools

SECTION III: Fiscal Practice & Macro Leadership

Session 11 Program Based Budgeting

Topics:
1. Purpose and function of a program budget
2. Types of budgets
3. Establishing program direct costs & allocating indirect costs
5. Understanding the "real" cost of a service/program; output & outcome costing
6. Budget justification
EPAS Standard: 2.1.3

Reading:

Rojas, P.X. Are the Cops in our Heads and Our Hearts? In The Revolution Will not Be
Funded: Beyond the Non-Profit Industrial Complex (page 220)

Kettner et al.:
Chapter12: Budgeting for control, management and planning
Chapter 13: Developing line- item, functional and program budgeting systems

Coley, & Scheinberg, Chapter 8: Creating the budget

Session 12 Fiscal Management

Topics
Understanding agency budgets, budget reports
Introduction to IRS Form 990
Audits

Tang, E. Non-Profits and the Autonomous Grassroots. In The Revolution Will not Be
Funded: Beyond the Non-Profit Industrial Complex (page 238).

CHOOSE TWO

Thomas, M. S. (2006). Managing the finances of nonprofit organizations. In Edwards,   R.L. &
Yankey, J.A. (Eds.), *Effectively managing nonprofit organizations* (pp 255-   274).
Washington DC: NASW Press.
        Ch 12

Kruzman,P.A. (2006). Managing liability and risk in non-profit settings. In Edwards, R.L.
        & Yankey, J.A. (Eds.),   *Effectively managing nonprofit organizations* (pp 275-   290).
Washington DC: NASW Press.
        Ch 13

Leibold, D.A. & Edwards, R.L. (2006). Managing financial uncertainty. In Edwards, R.L. &
        Yankey, J.A. (Eds.), *Effectively managing nonprofit organizations* (pp 431-456).
        Washington DC: NASW Press.
        Ch 20

Session 13 Macro Joint Session: Macro Alumni Panel—DATE TBD

Session 14 Career Development Workshop

Topics:
1. Leadership in human service organizations
2. Use of self-reflection in macro practice and leadership
3. Macro practice career opportunities and job search techniques
4. Transitioning from student to leadership role

EPAS Standard: 2.1.1

Readings:
#Austin, M.J., Regan, K., Gothard, S., & Carnochan S. (2012). Becoming a manager in
nonprofit human service Organizations: Making the transition from specialist to
generalist. *Administration in Social Work 37*(4), 372-385.

#Denhardt, R., Denhardt, J. & Aristigueta, M. (2013). *Managing human behavior in   public
and nonprofit organizations* (3rd ed). Thousand Oaks, CA: Sage   Publications.
  Ch 2: Knowing and managing yourself
  Ch 7: Leadership in public organizations

#Zippay, A. & Demone, H. (2011). Initial macro-level job responsibilities among MSW
graduates. *Administration in Social Work 35*(4). 412-424.