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**LOYOLA UNIVERSITY CHICAGO**

**SCHOOL OF SOCIAL WORK**

**COURSE SYLLABUS**

**SOWK 652**

**Organizations, Program Development, and Evaluation**

**[Add Semester and Year]**

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**Instructor Name, Title, and Pronouns:**

**Email:**

**Telephone:**

**Office Hours:** [Add days, times, in-person/virtual]

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**Class Day and Time:**

**Class Location:** [Add building and room number or note online via zoom]

**Credits/Length of Course:**

**Method of Delivery:** [Note: In-person/hybrid/online]

**Prerequisites:**

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**SCHOOL OF SOCIAL WORK MISSION & IDENTITY STATEMENT**

Loyola University Chicago School of Social Work provides transformative education for practice-informed social work. The school advances rich and diverse knowledge grounded in empowering work with clients and organizations from a participatory, person-in-environment perspective. We promote social justice through macro, mezzo, and micro practice. “Transformative education” reflects our commitment to engaging students to be effective change agents for social justice in a global context. “Practice-informed social work” refers to a strengths-based, client-centered focus on working with individuals, families, groups, communities, and environmental systems.

**Course Description**

This course builds on material presented in required core courses of the social work curriculum and develops knowledge and skills in the areas of program development, sustainability, and evaluation. The course draws upon an ecological systems-based understanding of nonprofit organizations and program development, situating social service nonprofits in historical policy contexts. Issues of race and power in U.S. social service and community organizations are integral to the course. Program development is presented using an approach that also highlights the role of power, values, needs, and resources in decision-making processes. Grant-writing skills are developed alongside a critical analysis of social entrepreneurship and longstanding models of philanthropy. Knowledge and application of technology-based strategies to monitoring, evaluation and program improvement through data collection, data analysis, and data presentation are covered as well.

**Learning Objectives & EPAS Related Competencies\***

\*Framed by the Council on Social Work Education’s Educational Policy and Accreditation Standards (EPAS)

**Competency 1.0: Demonstrate Ethical and Professional Behavior**

| **Assignment** | Assignment 1 | Knowledge, Values, Skills, and Cognitive & Affective Processes |
| --- | --- | --- |

**Competency 2.0: Engage in Diversity and Difference in Practice**

| **Assignment** | Assignment 2 | Knowledge, Values, Skills, and Cognitive & Affective Processes |
| --- | --- | --- |
| **Assignment** | Assignment 3 | Knowledge, Values, Skills, and Cognitive & Affective Processes |

**Competency 4.0: Engage in Practice-informed Research and Research-informed Practice**

| **Assignment** | Assignment 1 | Knowledge, Values, Skills, and Cognitive & Affective Processes |
| --- | --- | --- |
| **Assignment** | Assignment 2 | Knowledge, Values, Skills, and Cognitive & Affective Processes |

**Competency 6.0: Engage with Individuals, Families, Groups, Organizations, and Communities**

| **Assignment** | Assignment 2 | Knowledge, Values, Skills, and Cognitive & Affective Processes |
| --- | --- | --- |
| **Assignment** | Assignment 3 | Knowledge, Values, Skills, and Cognitive & Affective Processes |

**Competency 7.0: Assess Individuals, Families, Groups, Organizations and Communities**

| **Assignment** | Assignment 2 | Knowledge, Values, Skills, and Cognitive & Affective Processes |
| --- | --- | --- |
| **Assignment** | Assignment 3 | Knowledge, Values, Skills, and Cognitive & Affective Processes |

**Competency 9.0: Evaluate Practice with Individuals, Families, Groups, Organizations, and Communities**

| **Assignment** | Assignment 3 | Knowledge, Values, Skills, and Cognitive & Affective Processes |
| --- | --- | --- |
| **Assignment** | Assignment 4 | Knowledge, Values, Skills, and Cognitive & Affective Processes |

**Methods of Instruction**

**Sakai**

This course will be conducted [in person/online (synchronous or asynchronous)/hybrid] with content available via Sakai. Sakai is the learning platform used at Loyola University Chicago. The platform offers a variety of tools that allow students and instructors to communicate, turn in assignments, participate in discussions, provide/receive feedback, and track students’ grades and progress. Make sure to do the following before the first day of the semester:

* Verify that your credentials to access the course are working properly
* Locate and access the course within Sakai
* Familiarize yourself with the Sakai tools

**Minimum Technical Requirements**

The course is delivered [in person/online/hybrid]. Students are expected to have basic knowledge and command of a computer/tablet and be familiar with the following software and tools:

* Web browsers such as Firefox. Tools such as VoiceThread work better with Firefox
* Reliable high-speed internet access
* Access to an active e-mail account. Be sure to check your Loyola University e-mail regularly, including the Spam folder.
* Word processing program (Microsoft Word recommended)
* Antivirus software
* Adobe Acrobat
* Access to a Windows, Chromebook, or Mac computer to complete assignments in the event your mobile device does not meet the minimum technical requirements

**POLICIES & RESOURCES**

**LUC SSW BSW/MSW Student Handbooks**

Please familiarize yourself with all content in the [LUC SSW BSW & MSW Student Handbook](https://www.luc.edu/socialwork/student-support/forms/)s. Additional key information is noted below.

**Students with Special Needs – Student Accessibility Center**

Loyola University Chicago provides reasonable accommodations for students with disabilities. Any student requesting accommodations related to a disability or other condition is required to register with the Student Accessibility Center (SAC). Professors will receive an accommodation notification from SAC, preferably within the first two weeks of class. Students are encouraged to meet with their professors individually in order to discuss their accommodations. All information will remain confidential. Please note that in this class, the software may be used to audio record class lectures in order to provide equal access to students with disabilities.  Students approved for this accommodation use recordings for their personal study only and recordings may not be shared with other people or used in any way against the faculty member, other lecturers, or students whose classroom comments are recorded as part of the class activity.  Recordings are deleted at the end of the semester.  For more information about registering with SAC or questions about accommodations, please contact SAC at 773-508-3700 or SAC@luc.edu.

**Respect for Diversity**

Guided by the NASW Code of Ethics and the mission of the University, the School of Social Work is committed to the recognition and respect for variations in racial, ethnic, and cultural backgrounds and with regard to class, gender, age, physical and mental ability/disability, religion, sexual orientation, gender identity, and gender expression. The school values ethnically sensitive and culturally competent social work education and practice. Students must uphold the ethical standards set forth by the profession and the Jesuit ideals of the university. (See: [Respect for Diversity](https://www.luc.edu/socialwork/aboutus/) for more information).

**Gender Pronouns and Name on Roster**

Addressing one another at all times by using appropriate names and gender pronouns honors and affirms individuals of all gender identities and gender expressions. Misgendering and heteronormative language exclude the experiences of individuals whose identities may not fit the gender binary, and/or who may not identify with the sex they were assigned at birth. Explicit identification of pronouns is increasingly used in professional identification (e.g., conference nametags, Twitter handles, etc.).

As part of our professionalization and in the spirit of our professional values, during our first class as we introduce ourselves, you may choose to share your name and gender pronouns (e.g., Hello, my name is Sam and my gender pronouns are she/her/hers or Hello, my name is Lou, and my gender pronouns are they/them/theirs). If you would only like to introduce yourself by name, without pronouns, that is also completely fine. If you do not wish to be called by the name listed on the roster, please inform the class. You may also choose to add your pronouns to your zoom account profile (e.g., Sam Smith (they/them) so they always appear on the screen. Note that if you choose to do so, you must change your profile name from the main login on your Zoom account (e.g., add the pronouns after your last name) or you will have to add the pronouns manually during each and every zoom session. The goal is to create an affirming environment for all students with regard to their names and gender pronouns.

**Brave and Safe Space**

A safe space is ideally one where the expression of identity and experience can exist and be affirmed without fear of repercussion and without the pressure to educate. While learning may occur in these spaces, the ultimate goal is to provide support. A brave space encourages dialogue. Recognizing differences and holding each person accountable to do the work of sharing experiences and coming to new understandings - a feat that’s often hard, and typically uncomfortable.

The School of Social Work values creating a brave and safe space within classrooms for all students. Our instructors welcome all course-related comments and concerns from students. If you have a concern about whether your classroom is a supportive, brave, and safe space, or any other concerns, you are welcome to speak with your instructor or any other faculty or staff member that you trust. That person will help you talk through a pathway to address your concerns and bring them to the Associate Dean with you or on your behalf if you so desire. You should be reassured that expressing your concerns will not result in any penalty to you.

**Title IX Disclosure and Rights**

Under Title IX federal law, "no person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity receiving federal financial assistance" (Title IX of the Education Amendments of 1972). It is important for you to know the professor has a mandatory obligation to notify designated University personnel of incidents of gender-based misconduct (sexual assault, dating/domestic violence, stalking, sexual harassment, etc.) that are shared in private or during class discussions. The reason for this is to keep all members of the Loyola community safe, also to ensure you are connected to the resources and reporting options available. Hypothetical scenarios that are discussed do not require any action. Please visit the [Title IX at Loyola University Chicago Page](https://www.luc.edu/equity/titleixequitylaws/titleix/) for more information regarding the University’s response to notifications of gender-based misconduct. The following link contains information if you wish to [speak or contact a confidential resource on campus](https://www.luc.edu/equity/about/contacttheoecteam/).

**Student Code of Conduct**

Respecting the rights and opinions of others is an important aspect of a Jesuit education. Please respect others by allowing others to express their opinion, avoiding the use of vulgar language and/or offensive or discriminatory comments (racial, ethnic, etc.). It’s the student’s responsibility to read and adhere to the[Loyola University Code of Conduct](https://www.luc.edu/media/lucedu/law/fyi/pdfs/Code_of_Conduct.pdf).

**Privacy Policy – FERPA**

FERPA (Family Educational Rights and Privacy Act) is a federal law that protects the privacy of students and educational records. To learn more about students’ privacy rights visit the [FERPA Actat Loyola University](https://www.luc.edu/regrec/aboutus/ferpa/) website or the [U.S Dept. of Education website](https://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html). Loyola University, e-mail, and Learning Management System meet FERPA requirements.

**Third-Party and FERPA**

Some assignments may require the use of public online websites, applications, social media, and/or blogs among others. If a course requires students to participate in these types of activities the students can choose not to participate. In this case, the students should contact the instructor as soon as possible and let them know of their decision. Please avoid sharing the private information of others.

**Resources for Writing**

The Writing Center, Loyola University Chicago, is available to help writers develop and clarify ideas and work on specific issues such as punctuation, grammar, documentation, and sentence structure. Students are encouraged to visit the [Writing Center Website](https://www.luc.edu/writing/index.shtml) for additional information. Services are available at both WTC & LSC. Resources for APA may be found here: <http://owl.english.purdue.edu/owl/resource/560/01/>

**Help with Technology – Help Desk**

The ITS Service Desk provides the University with a single point of access for support with technology. They are committed to providing excellent, professional customer service in tracking and resolving support requests. To request assistance, please contact the ITS Service Desk at 773.508.4ITS or via email at ITS Service Desk ITSServiceDesk@luc.edu. Help Desk [Support Hours](https://www.luc.edu/its/service/support_hours.shtml).

**Important Contact Information**

IT Help Desk: 773-508-4487, [IT Help Desk Website](http://www.luc.edu/its/service/)

Wellness Center: 773- 494-3810,  [Wellness Center Website](https://www.luc.edu/wellness/)
Writing Center: 312-915-6089, [Writing Center Website](https://www.luc.edu/writing/index.shtml)
Tutoring – Academic Excellence: 773-508-7708, [Tutoring Website](https://www.luc.edu/tutoring/index.shtml)
Ethics Hotline: 1-855-603-6988, [Ethics Hotline Website](https://www.luc.edu/hr/ethics/)
Military Veteran Student Services: 773-508-7765, [Veteran Student Services Website](https://www.luc.edu/veterans/)
Library: 312-915-6622, [Library Website](http://libraries.luc.edu/)

Students Accessibility Center: 773-508-3700, [Students Accessibility Center Website](https://www.luc.edu/sac/)

**ACADEMIC INTEGRITY, GRADING & ASSIGNMENTS**

**Academic Integrity and Plagiarism**

Academic integrity is essential to a student’s professional development, their ability to serve others, and to the university’s mission. Therefore, students are expected to conduct all academic work within the letter and the spirit of the Statement on Academic Honesty of Loyola University Chicago, which is characterized by any action whereby a student misrepresents the ownership of academic work submitted in their name. Students who plagiarize risk receiving a failing grade at the instructor’s discretion. All students who plagiarize will be referred to the Committee of Student Affairs (CSA) for judicial review. Knowledge of what plagiarism is will help you from inadvertently committing it in your papers. Additional [information on plagiarism](https://www.plagiarism.org/).

Plagiarism is a serious ethical violation, the consequences of which can be a failure of a specific class and/or expulsion from the school**.** Responsibilities of Academic Honesty are detailed in [the LUC BSW & MSW Student Handbooks](https://www.luc.edu/socialwork/student-support/forms/). Please read the Graduate Catalog stating the university policy on plagiarism. The definition of plagiarism is: “In an instructional setting, plagiarism occurs when a writer deliberately (or unintentionally) uses someone else’s language, ideas, or other original (not common-knowledge) material without acknowledging its source." Source: WPA (n.d.). Defining and Avoiding Plagiarism: The [WPA Statement on Best Practices](http://wpacouncil.org/files/wpa-plagiarism-statement.pdf).

This commitment ensures that a student in the School of Social Work will neither knowingly give nor receive any inappropriate assistance in academic work, thereby, affirming personal and professional honor and integrity. Students may not use the same assignment content to fulfill different course requirements. If a paper is submitted to a course that is closely related to a paper submitted for another course, it is suggested that the student cite the paper. (Example: paper submitted for SOWK 000, Instructor: Wayne Williams, Semester: Spring 2020)

**Turn-It-In**

By taking this course you agree that all required papers may be subject to submission review to Turnitin.com (within Sakai or otherwise) to detect plagiarism. Any and all written material submitted as course work may be subject to detection of plagiarism using the Turn-it-in database. To learn about their usage policy, visit the [Turn-It-In](https://www.turnitin.com/) website.

**Academic Warnings**

Students are responsible for tracking their progress through each class. As a result, students should identify and resolve any academic difficulty as early as possible. In the event that a student is experiencing academic difficulty, the student will be notified by the instructor in writing (via e-mail) no later than the deadline for early alert according to the LUC Academic calendar at mid-term. See the [LUC SSW BSW & MSW Student Handbooks](https://www.luc.edu/socialwork/student-support/forms/) for additional information regarding academic concerns.

**Grading Criteria**

Grades are based on the following criteria:

**A** = Exceptional. This grade will be assigned to assignments that show extensive use of literature as well as broad use of concrete concepts and examples of practice, paying special attention to the use of professional language, grammar, and sentence structure in all written materials.

**B** = Fully meets graduate-level standards. This grade will be assigned to tasks and assignments in which all the steps have been satisfactorily completed showing a combination of the appropriate use of theories, principles, and precise descriptions of practice.

**C** = Performance, in general, is not satisfactory and is below the graduate level standard, all the requirements of the task or assignment have been completed.

**D** = Performance, in general, is not adequate. The student must re-take the course.

**F** = Failure. The performance and quality of work are not satisfactory, or some parts of the tasks or assignments have not been completed.

**I** = At the discretion of the section Instructor a temporary grade of **Incomplete** may be assigned to a student who, for a reason beyond the student’s control, has been unable to complete the required work in a course on time. The request signed by the student and the faculty member must be approved and on file with the BSW or MSW Program Director when grades are submitted.

### **Grading Scale**

|  |  |
| --- | --- |
| **Grade** | **Percentage (%)** |
| **A** | 96 – 100 |
| **A-** | 92 – 95 |
| **B +** | 88 – 91 |
| **B** | 84 – 87 |
| **B-** | 80 – 83 |
| **C+** | 76 – 79 |
| **C** | 72 – 75 |
| **C-** | 68 – 71 |
| **D+** | 64 – 67 |
| **D** | 60 – 63 |
| **F** | Below 60 |

**Grade of “Incomplete”**

The temporary grade of “Incomplete” will be considered for those students who, for reasons beyond their control, have not been able to complete the requirements and tasks of the course on time, within the time stipulated in the academic calendar. It is the student's responsibility to request an “Incomplete” grade. This request must be approved and signed by the instructor and the student with the final approval of the program director. If the student fails to complete the request or receive appropriate approval, the final grade will be F.

**Use of Rubrics as an Evaluation Tool**

Rubrics will be used as assessment tools for course activities and assignments. All tasks and assignments will be evaluated following the criteria outlined in the specific rubric. The grade of each activity will be based on the combination of points assigned to each evaluation criteria listed in the rubric for that assignment. Unless an obvious error can be established and documented in the rubric, the points and/or grade awarded by the instructor will be considered final for that activity or assignment.

**Facilitator Feedback to Learners**

The instructor will provide individual feedback to each student for each assignment submitted. These comments will be offered to complement the grade obtained and will include comments about student progress, knowledge, skills, and participation. Instructors will post constructive feedback no later than 7 days after assignment submission.

**DESCRIPTION OF ASSIGNMENTS**

**Assignment 1: Comparing Codes of Ethics** (3-4 pages, 10 points)

Examine the code of ethics for your discipline and compare and contrast it to two of the other codes mentioned in the chapter. Discuss the similarities and differences in the codes of ethics between the disciplines. APA style, 3-4 pages NOT including title page or references. Do NOT include abstract.

**Assignment 2: Logic Model**

Your paper should be approximately 5-7 pages in length, APA style, and format.

Create a logic model that describes a program need or effort to solve a community problem at your field placement. You should seek input and guidance from your supervisor or other agency staff about the need.

Please note that you will take this program/community need and create a logic model and an evaluation plan in assignment 2; and a budget and budget justification for the program in assignment 3. Be sure to choose a program and need that is relevant and of interest to you. Note that we are not doing the needs assessment as part of the required content for this class.

**For example**: The **problem** is youth homelessness. The **program** includes evening and weekend housing and recreation. The **logic model and evaluation** will include how to measure the components of assessing and maintaining stabilized housing, job readiness programming, socialization programs, etc. The **budget** showsthe proposed program costs and justifications for the costs.

Please note that utilizing any materials, narrative or other course content may be considered plagiarism and may result in failure for this course. Please speak to your instructor about using other course materials (i.e., a budget format, logic model format, etc.) and be sure to cite appropriately using APA format at all times.

**Outline**

1. Introduction
	1. What is a logic model?
	2. Why relevant? Useful? Necessary?
	3. What are key limitations for logic models?
2. What population, program or organization will you create a logic model for?
3. How did you seek consultation and guidance?
4. Develop a logic model as outlined in class: Inputs, Activities, Outputs, and Outcomes.
* **Inputs** - List variables to be used under the headings of clients, staff, material resources, facilities, and equipment. On a separate sheet of paper give a narrative explanation as to why you chose your inputs as it relates to best practices.
* **Activities** - Identify all services to be provided and include a one-sentence service definition for each. List the relevant service tasks and methods of intervention for each service.
* **Outputs** - List and define units of service for each service to be provided.
* **Intermediate Outcomes** - List the intermediate outcomes for each service being provided.
* **Final Outcomes** - List final outcomes
* **Logic Model Narrative**: Explain why you chose activities and how they logically lead to outcomes.
1. How will the logic model assist with program and evaluation design?
2. Concluding thoughts about logic modeling and the impact on your program, agency, and community being served.

**Assignment 3 – Program Evaluation & Budget** (6-8 pages, 20 points)

**Section 1 Program Evaluation Plan**

Section 1 should be approximately 5-6 pages.

This section is a program evaluation plan for the program that was illustrated in the logic model. Your evaluation plan will serve to provide data for the following (hypothetical) purposes:

* To determine whether program targets are realistic
* To assess program outcomes
* To provide data to report to funders
* To provide data for organizational decision making

The following outline represents the content to be covered:

* Introduce the importance of program evaluation with a narrative that speaks to the usefulness of monitoring activities, participation, programming, and outcomes and be sure to use citations to back up your narrative when appropriate.
* Next take each of your activities and build them out in the following format (one by one):
	+ **Activity**: Name and number of each activity (e.g., Activity 1: Mental health counseling to address depression and self-esteem among multi-ethnic youth between the ages of 13-17 in five schools located on the south side of Chicago).
	+ **Participation**: List out participation for the activity above: X number of clients will attend X number of counseling sessions over X time. (e.g., 50 youth (10 from each of the 5 schools) will attend 45-minute individual counseling sessions for 10 weeks during the calendar year.
	+ **Outcomes**: List your short-, mid-, and long-term outcomes. Over what duration will they be accomplished (e.g., 3 months for short, 6 months for mid, 12 months for long)? Be sure to be explicit with writing and describing each outcome. (For example, Short Term Objective (1-3 months): 50% of youth will report decreased levels of depression and 50% of youth will report increased levels of self-esteem. Continue in the same fashion for the mid and long-term outcomes). Note: it is not required for you to list (# and %) changes for every outcome if it is not fitting for your activities and measurement.
	+ **Measurements**: When and how will you measure each outcome? Who will collect the data? Think about time and frequency here. (For example, Levels of depression and self-esteem among youth will be evaluated once monthly via mixed methods using paper and/or online surveys).
	+ **Benchmarks and Targets:** What is the process and outcome? When do you anticipate changes to occur? What are your targets for baseline, time point 1 (T1), and then at T2, T3, etc.? When are those targets or time points (e.g., once per quarter)?
	+ Evaluation Tools: What tools will you use to measure changes for this activity and among this population? Why did you choose this tool? Did you find this tool, or did you create it? Is this tool tested and rigorous? Will you use it with fidelity? If so, why is this relevant? If not, why not so?
	+ **Appendix**: List and include a copy of each tool at the end of the paper as Appendix A, B, C, and so on. Be sure to include proper citations for tools in your paper and in any appendix narrative.
* After you repeat the process for each of your activities using the above-listed format, please conclude your paper with a short reflection of how this process went for you. What was interesting and challenging about the program evaluation process? What lessons did you learn about your own skills, abilities, and limitations? Did the consultation with peers really matter? How will this process be mirrored when you are working within agency-based settings? Will you prefer to work alone or in teams or groups? What are your final reflections for assignment two?

***\*\*Please note that your logic model and evaluation plan will be reviewed for comments, questions and feedback in small group consultations with your classmates.***

**Section 2: Budget & Budget Justification**

This section should include a 1 paragraph introduction, a 1–2-page budget table, and a 1-3 page budget justification. For this section, you will create a budget for the program for which you wrote the logic model and evaluation plan. This budget will be a grant proposal budget. That is, you will create a budget in table format (you should use the Excel template on Sakai – edit and/or expand as necessary) and you will provide a budget justification (see example on Sakai). A budget justification is a narrative description that explains the costs for every single line in the budget (every line has its own description that should include what is being paid for, why, and cost if the line contains multiple items. For example, program supplies might include 10 different things – explain each of them and how much money each requires). Assume that your program is part of a larger organization so that your program will pay indirect costs for facilities etc.

Guidelines & Constraints

* You have a budget of $1,000,000 for one year
* State policy mandates that you must have at least one licensed social worker (LCSW) over the programs to provide clinical supervision and sign off on paperwork when necessary.
* You may need support staff to assist with answering phones, scheduling appointments, submitting bills, ordering supplies, and running the office.

**Assignment 4: Understanding Financial Reports**

Read the following memos sent to you. For each memo, draft a reply outlining your decision or the action you plan to take. Use the ABC Monthly Statement of Revenue and Expenses – All Departments in Table 8.2 of chapter 8 in our textbook as the basis for your answers.

**Memo 1**

Date: August 31, 20XX

To: You

From: Janice Williams, The Finance Committee Chair

Subject: Financial Report to the Board of Directors

I will be presenting the financial report to the full board at our next meeting. I have received the financial statements (the monthly statement of activities and the balance sheet), but I need your help in preparing my report. Please prepare a narrative report that explains the financial statements. I need an overall statement about the financial condition of the agency so far, this fiscal year, and how we are doing compared to last year. Also, please explain any variances in the budget in both income and expenses and give me your recommendations for any adjustments that will be needed for the remainder of the fiscal year. (2-3 pages as a report)

**Memo 2**

Date: August 31, 20XX

To: You

From: Carlos Gutierrez, The Board Chair

Subject: Budget for Next Fiscal Year

In reviewing the income statements for August, I noticed there are some rather large variances between the budget-to-date and the actual amounts. I know we will be starting the formal budgeting process next month, but it would be helpful if you could give me some advance information on our financial picture. Please look at the administration statement, the Department A statement, and the Department B statement and project what you think our income and expenses are likely to be next fiscal year. I don’t need a lot of detail. Just give me a one-page projected budget by using the actual income and expenses for the first eight months of this year and projecting next year’s 12-month budget.

(Hint: remember the year-to-date actual and the current budget are only for the first eight months of the year. Your task is to examine the eight months’ actual income and actual expenses and project what next year’s budget might look like.)

**Class Participation & Attendance**

The course is heavily experiential, and therefore participation is required. Participation is defined as on-time attendance for complete class sessions, attentive non-verbal behavior, offering comments relevant to discussions, appropriate use of technology in the classroom, and active participation in class exercises. Your participation in each session will be graded; this will include in-class, participatory activities.

**Graded Assignments**

| **Assignment** | **Points** | **Due Date** |
| --- | --- | --- |
| Class Participation and Attendance | 14 | Ongoing |
| Assignment 1: Comparing Codes of Ethics | 10 | Week 3 |
| Assignment 2: Logic Model | 20 | Week 10 |
| Assignment 3: Budget, Budget Justification, & Evaluation Plan | 36 | Week 12 |
| Assignment 4: Understanding Financial Reports | 20 | Week 14 |
| **TOTAL**  | **100** |  |

**REQUIRED TEXT(S)**

* Hoefer, R. & Watson, L. (2020). Essentials of social work Management and Leadership: A competency-based approach. Cognella.

ISBN-13: 978-1516598748

ISBN-10: 1516598741

**RECOMMENDED TEXT(S)**

* *Please note that weekly Recommended Content is not required.*

**RUBRICS**

**COURSE SCHEDULE**

**Module 1 – History and Function of Nonprofit Organizations**

**Date**

**Description**

In this module, we look at the emergence of nonprofit organizations and their present-day characteristics.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Identify and describe the historical factors that gave rise to nonprofit organizations
2. Describe the size and other characteristics of the nonprofit field
3. Explain the legal and tax policies tied to nonprofit organizations

**Required Resources**

* Golensky, M., & Hager, M. (2020). *Strategic Leadership and Management in Nonprofit Organizations: Theory and Practice* (2nd edition). Oxford University Press. Chapter 2, Historical Moments in the U.S. Nonprofit Sector (pp. 13-27).
* Worth, M. J. (2014). *Nonprofit Management: Principles and Practice*. SAGE. Chapter 2, Overview of the Nonprofit Sector (pp. 18-47).

**Recommended Resources**

* Furman, R., Gibelman, M., & Winnett, R. (2020). *Navigating Human Service Organizations: Essential Information for Thriving and Surviving in Agencies* (4th edition). Oxford University Press. Chapter 2, Distinguishing Features of Organizations (pp. 25-54).
* Casey, J. (2016). Comparing Nonprofit Sectors Around the World: What Do We Know and How Do We Know It? *Journal of Nonprofit Education and Leadership*, *6*(3). <https://doi.org/10.18666/JNEL-2016-V6-I3-7583>
* Strachwitz, R. G. (2021). What is Civil Society? A Primer. (Opuscula, 160). Berlin: Maecenata Institut für Philanthropie und Zivilgesellschaft. [https://nbn-resolving.org/urn:nbn:de:0168-ssoar-76607-1](https://nbn-resolving.org/urn%3Anbn%3Ade%3A0168-ssoar-76607-1)

**Module 2 – Context, Values, & Ethics in Administration**

**Date**

**Description**

In this module, we will explore the context of social work administration and explore theories of ethics, codes of ethics, and a model of ethical decision-making for administrators.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Discuss the context of administration in social service organizations and some important areas of concern for leaders
2. Analyze and compare codes of ethics for various disciplines that work as leaders in organizations
3. Practice using the model of ethical decision-making to resolve an ethical dilemma

**Required Resources**

* Hoefer and Watson Textbook: Chapter 1 The Context of Social Work Leadership & Administration
* Hoefer and Watson Textbook: Chapter 2 Values & Ethics in Administration
* Cohen, S. (2018, September 10). Bringing Environmental Sustainability into Organizational Management. *State of the Planet*. <https://news.climate.columbia.edu/2018/09/10/bringing-environmental-sustainability-organizational-management/>
* Pallotta, Dan. (2013, March 11). *The Way We Think About Charity Is Dead Wrong* [Video 19 min]. <https://www.youtube.com/watch?v=bfAzi6D5FpM>

**Recommended Resources**

* Wathen, M. V., & Allard, S. W. (2014). Local nonprofit welfare provision: The United States and Russia. *Public Administration Issues*, *5*(Special Issue), 7–28. <http://dx.doi.org/10.17323/1999-5431-2014-0-5-7-28>

**Module 3 – Policy & Nonprofits: External and Internal**

**Date**

**Description**

This module looks at external and internal policies that affect nonprofit functioning.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Identify federal and state laws that impact nonprofit social service agencies
2. Articulate how changes in various areas of social policy might impact organizations
3. Explain how internal organizational policies (both their existence and lack thereof) could impact an organization

**Required Resources**

* Furman, R., Gibelman, M., & Winnett, R. (2020). *Navigating Human Service Organizations: Essential Information for Thriving and Surviving in Agencies* (4th edition). Oxford University Press. Chapter 8 The Changing Environment of Organizations (pp. 168-186).
* Young, D. R., Steinberg, R., Emanuele, R., & Simmons, W. O. (2019). *Economics for Nonprofit Managers and Social Entrepreneurs*. Edward Elgar Publishing. Chapter 3: Policy and Management Issues (pp. 58-81).
* Saul, J., & Audage, N. C. (2007). *Preventing Child Sexual Abuse Within Youth-serving Organizations: Getting Started on Policies and Procedures* [Data set]. American Psychological Association. <https://doi.org/10.1037/e587062010-001>
* University of California Television. (2017, December 4). *Mission-Driven Pathways: The Nonprofit Sector - San Diego Workforce Conference 2017* [Video 21 min]. <https://youtu.be/srMl0W2m2kA>

**Module 4 – Theories**

**Date**

**Description**

This module looks at theories of organizations and theories of change.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Describe and give examples of organizational theories and how these impact organizational decision making
2. Practice articulating theories of change
3. Identify and give examples of theories of change for specific program examples

**Required Resources**

* Hoefer and Watson Textbook: Chapter 3 Administrative & Organizational Theories
* Organizational Research Services. (2004). *Theory of change: A practical tool for action, results, and learning* (p. 49). Annie E. Casey Foundation. <https://assets.aecf.org/m/resourcedoc/aecf-theoryofchange-2004.pdf>
* Gooding, K., Makwinja, R., Nyirenda, D., Vincent, R., & Sambakunsi, R. (2018). Using theories of change to design monitoring and evaluation of community engagement in research: Experiences from a research institute in Malawi. *Wellcome Open Research*, *3*, 8. <https://doi.org/10.12688/wellcomeopenres.13790.1>

**Recommended Resources**

* Wathen, M. V. (2020a). Institutional logics and diverging organizational forms: An empirical study in Russia. *Journal of Public and Nonprofit Affairs*, *6*(2), 159–181.

**Module 5 – Strategic Planning**

**Date**

**Description**

This module explores the practice, usefulness, and potential pitfalls of strategic planning.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Explain how strategic planning is tied to an organization’s vision, mission, and values
2. Analyze a strategic plan
3. Identify models of strategic planning
4. Explain the uses of strategic planning
5. Articulate how stakeholders fit into strategic planning

**Required Resources**

* Hoefer and Watson Textbook: Chapter 6 Strategic Planning
* Golensky, M., & Hager, M. (2020). *Strategic Leadership and Management in Nonprofit Organizations: Theory and Practice* (2nd edition). Oxford University Press. Chapter 8, Strategic Planning (pp. 147-170).
* Center for Community Health and Development. (1994-2022). *Community Toolbox*, Chapter 8 Developing a Strategic plan. University of Kansas. (ALL SECTIONS IN CHAPTER 8) <https://ctb.ku.edu/en/table-of-contents/structure/strategic-planning>

**Module 6** **– Introduction to Design Thinking**

**Date**

**Description**

This module introduces design thinking and its application to social service organizations and to innovation.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Identify the key processes in design thinking
2. Practice design thinking
3. Apply design thinking to program development

**Required Resources**

* Liedtka, J., Salzman, R., & Azer, D. (2017). *Design thinking for the greater good: Innovation in the social sector*. Columbia Business School Publishing. Chapters 1 & 2. <https://luc.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma99213781510202506&context=L&vid=01LUC_INST:01LUC&search_scope=MyInst_and_CI&tab=Everything&lang=en>
* *What is Design Thinking?* (2016). University of Virgina Darden. 11:27 <https://luc.primo.exlibrisgroup.com/discovery/fulldisplay?docid=alma99213826987602506&context=L&vid=01LUC_INST:01LUC&search_scope=MyInst_and_CI&tab=Everything&lang=en>
* Hasso Plattner Institute of Design at Stanford. (n.d.). *An introduction to design thinking process guide*. <https://web.stanford.edu/~mshanks/MichaelShanks/files/509554.pdf>

**Recommended Resources**

* Liedtka, J., Salzman, R., & Azer, D. (2017). *Design thinking for the greater good: Innovation in the social sector*. Columbia Business School Publishing.

**Module 7 – Program Planning, Logic Models, and Program Evaluation – Week 1**

**Date**

**Description**

This module lays the foundation for understanding program planning, logic models, and program evaluation.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Explain the interrelationships of program planning, logic models, and program evaluation
2. Identify the steps necessary in program planning, logic models, and program evaluation
3. Practice extrapolating a logic model from a description of a program and identifying where evaluation could take place and what data would need to be collected

**Required Resources**

* Hoefer and Watson Textbook: Chapter 7 Program Planning, Logic Models, and Program Evaluation
* Centers for Disease Control and Prevention. (2022a, January 31). *Framework Step 1 Checklist | Program Evaluation*. <https://www.cdc.gov/evaluation/steps/step1/index.htm>
* Centers for Disease Control and Prevention. (2022b, January 31). *Framework Step 2 Checklist | Program Evaluation*. <https://www.cdc.gov/evaluation/steps/step2/index.htm>
* Centers for Disease Control and Prevention. (2022c, January 31). *Framework Step 3 Checklist | Program Evaluation*. <https://www.cdc.gov/evaluation/steps/step3/index.htm>

**Recommended Resources**

* Yampolskaya, S., Nesman, T. M., Hernandez, M., & Koch, D. (2004). Using concept mapping to develop a logic model and articulate a program theory: A case example. *American Journal of Evaluation*, *25*(2), 191–207.

**Module 8 – Program Planning, Logic Models, and Program Evaluation – Week 2**

**Date**

**Description**

This module continues to explore and practice program planning, logic models, and program evaluation.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Explain the interrelationships of program planning, logic models, and program evaluation
2. Identify the steps necessary in program planning, logic models, and program evaluation
3. Practice extrapolating a logic model from a description of a program and identifying where evaluation could take place and what data would need to be collected

**Required Resources**

* Boyce, K. (2017). Chapter 17 Assessment and Evaluation. In E. P. Congress, A. Luks, & F. Petit, (Eds.), *Nonprofit management: A social justice approach (pp. 257-270)*. Springer Publishing Company.
* Benjamin, L. M. (2012). Nonprofit Organizations and Outcome Measurement: From Tracking Program Activities to Focusing on Frontline Work. *American Journal of Evaluation*, *33*(3), 431–447. <https://doi.org/10.1177/1098214012440496>
* Hoefer, R. (2015, October 4). *Creating a Logic Model in Microsoft Word* [Video 14:56]. <https://www.youtube.com/watch?v=Ph2jtBaVKMM>

**Module 9 – Budgets & Finance – Week 1**

**Date**

**Description**

This module explores how organizations use budgeting and tracking of finances to inform their decision-making processes.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Explain the ways that nonprofit organizations keep track of and report financial information
2. Interpret various types of financial reports and information
3. Practice the budgeting process
4. Describe the use of cashflow management

**Required Resources**

* Hoefer and Watson Textbook: Chapter 8 Budgeting and Finance
* Werner, F. M., (2017). Chapter 7 Organizational Finance. In E. P. Congress, A. Luks, & F. Petit, (Eds.), *Nonprofit management: A social justice approach (pp. 257-270)*. Springer Publishing Company.
* Wallace Foundation. (2015, March 9). *5 Step Guide to Budget Development: Resources for Nonprofit Financial Management* [Video 28:43]. <https://www.youtube.com/watch?v=edC7v81Fmj8>
* Nonprofit Assistance Fund. (2016, May 18). *Build a better budget* [Webinar Video 55:22].

**Recommended Resources**

* Young, D. R., Steinberg, R., Emanuele, R., & Simmons, W. O. (2019). *Economics for Nonprofit Managers and Social Entrepreneurs*. Edward Elgar Publishing.
* Furman, R., Gibelman, M., & Winnett, R. (2020). *Navigating Human Service Organizations: Essential Information for Thriving and Surviving in Agencies* (4th edition). Oxford University Press. Chapter 3 How Organizations are Financed (pp. 55-78).

**Module 10 – Budgets & Finance – Week 2**

**Date**

**Description**

This module explores how organizations use budgeting and tracking of finances to inform their decision-making processes.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Explain the ways that nonprofit organizations keep track of and report financial information
2. Interpret various types of financial reports and information
3. Practice the budgeting process
4. Describe the use of cashflow management

**Required Resources**

* This week class consists of a workshop.

**Module 11 – Fund Development and Grant Writing – Week 1**

**Date**

**Description**

This module explores sources of funding, types of fundraising campaigns, and types of grants and contracts.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Identify the main funding sources for nonprofit social services
2. Identify the difference between government grants and government contracts
3. Describe various methods of fundraising
4. Explain and practice how organizational mission, vision, theories of change, logic models, and evaluation are integrated into grant proposals

**Required Resources**

* Hoefer and Watson Textbook: Chapter 9 Fund Development and Grant Writing
* TEDx. (2014, June 3). *Fundraising 101: Rueben Mayes at TEDxWSU 2014* [Video 16:33]. <https://youtu.be/GsvSWkEHNDk>

**Recommended Resources**

* Hoefer, R. (2014). *Funded! Successful Grantwriting for Your Nonprofit: Getting Started as a Grantwriter*. CAN-DO Books.

**Module 12 – Fund Development and Grant Writing – Week 2**

**Date**

**Description**

This module explores sources of funding, types of fundraising campaigns, and types of grants and contracts.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Identify the main funding sources for nonprofit social services
2. Identify the difference between government grants and government contracts
3. Describe various methods of fundraising
4. Explain and practice how organizational mission, vision, theories of change, logic models, and evaluation are integrated into grant proposals

**Required Resources**

* Hoefer, R. (2014). *Funded! Successful Grantwriting for Your Nonprofit: Getting Started as a Grantwriter*. CAN-DO Books. Chapter 10 Budgeting (pp. 142-154).

**Module 13 – Social Entrepreneurship and Social Enterprises**

**Date**

**Description**

This module explores new organizational forms and activity that seek to make a difference in social justice and inequity.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Identify new organizational forms that seek to make a difference in the social welfare of populations.
2. Explain and give examples of how traditional nonprofits have used innovation to survive and thrive.
3. Describe how for-profit groups are working to include social impact as part of their mission.
4. Analyze the strengths and drawbacks of the various models.

**Required Resources**

* Pirson, M. (2017). Chapter 16 Social Entrepreneurship. In E. P. Congress, A. Luks, & F. Petit, (Eds.), *Nonprofit management: A social justice approach (pp. 257-270)*. Springer Publishing Company.
* Worth, M. J. (2014). *Nonprofit Management: Principles and Practice*. SAGE. Chapter 16 Social Entrepreneurship and Innovation (pp. 410-426).
* Bergfeld, A., Plagmann, C., & Lutz, E. (2021). Know Your Counterparts: The Importance of Wording for Stakeholder Communication in Social Franchise Enterprises. *VOLUNTAS: International Journal of Voluntary and Nonprofit Organizations*, *32*(1), 104–119. <https://doi.org/10.1007/s11266-020-00289-4>

**Recommended Resources**

* Briar-Lawson, K., Miesing, P., and Ramos, B. M. (Eds.). (2021) *Social entrepreneurship and enterprises in economic and social development.* Oxford University Press. DOI: 10.1093/oso/9780197518298.003.0004.
* Stephan, U., Patterson, M., Kelly, C., & Mair, J. (2016). Organizations Driving Positive Social Change: A Review and an Integrative Framework of Change Processes. *Journal of Management*, *42*(5), 1250–1281. <https://doi.org/10.1177/0149206316633268>

**Module 14 – Management Information Systems and Technology**

**Date**

**Description**

This module explores the use of technology in collecting and presenting data, with an analysis of its impact on marginalized groups.

**Learning Objectives**

After successfully completing this module, students will be able to:

1. Discuss the benefits and use of management information systems (MIS)
2. Link organizational mission, goals, and objectives to MIS outcomes
3. Outline and discuss how to develop integrated information systems
4. Produce reports that improve organizational effectiveness
5. Critically analyze how data and its presentation can help or harm marginalized communities

**Required Resources**

* Rofuth, T., & Piepenbring, J. M. (2020). *Management and Leadership in Social Work*. Springer Publishing Company. Chapter 12, Management information systems and managing technology for social work environments (pp. 349-365).
* Techimpact Idealware. (2020). *Nonprofit technology policy workbook*. <https://f.hubspotusercontent20.net/hubfs/575821/TECH%20IMPACT%20IDEALWARE%20NP%20POLICY%20WORKBOOK%20081920.pdf>
* Mathiyazhagan, S., & Kleiner, S. (2021). *Work in data science: Tech policy gaps and addressing harm*. SAFELab, Columbia University. <https://safelab.socialwork.columbia.edu/sites/default/files/content/Tech%20Policy%20Brief_%20Social%20work%20in%20data%20science%20%281%29.pdf>
* Nonprofit Marketing Strategies. (2019, June 4). *How to Create a Social Media Strategy for Your Nonprofit* [Video 10:46]. <https://www.youtube.com/watch?v=pii1jqpsK9M>

**COURSE FEEDBACK & SYLLABUS REFERENCES**

**Course Feedback**

You will receive an email communication near the end of this semester with regard to your feedback for this course related to the content, assignments, instructor support, etc. Your feedback for each of your courses improves learning outcomes for students and the instruction process in the course. Your feedback is valuable and affects revisions to this course.

**Syllabus References**

* Macro Practice Journals
* Administration in Social Work
* City and Community
* Community Development
* Community Mental Health
* Critical and Radical Social Work
* Health and Social Care in the Community
* Human Service Organizations
* International Journal of Social Welfare
* Journal of Community Practice
* Journal of Community Psychology
* Journal of Progressive Human Services
* Journal of Social Policy
* Journal of Social Services Research
* Journal of Sociology and Social Welfare
* Journal of Urban Affairs
* Nonprofit Management and Leadership
* Nonprofit and Voluntary Sector Quarterly
* Social Policy and Administration
* Social Service Review
* Urban Affairs Review

**Professional Journals**

**Websites**

* Association for Community Organization and Social Administration. [www.acosa.org](http://www.acosa.org)
* Association for the Study and Development of Community. [www.senseofcommunity.com](http://www.senseofcommunity.com)
* Association for Research on Nonprofit Organizations and Voluntary Action. [www.arnova.org](http://www.arnova.org)
* Center for Social Development. <http://gwbweb.wustl.edu/csd>
* Comm-Org: The Online Conference on Community Organizing. <http://comm-org.wisc.edu>
* Community ToolBox. <http://ctb.ku.edu/en>
* Influencing Social Policy. <https://www.influencingsocialpolicy.org/>
* International Society for Third Sector Research <https://www.istr.org/>
* National Association for Community Leadership. <http://communityleadership.org>
* Neighborhood Funders Group. [www.nfg.org/](http://www.nfg.org/cotb)
* Network for Social Management <https://socialworkmanager.org/>
* Social Welfare Action Alliance. <http://socialwelfareactionalliance.org>

**Other**