



# SWK-S 662 Fiscal Management, Marketing and Resource Development (3 cr.)

## Course Information

**Semester Year:** Spring 2017  
**Section Number:** XXXXX  
**Location:** XXXXX  
**Day:** XXXXX  
**Time:** XXXXX

**Instructor:** XXXXX XXXXXXXXXXXX  
**Office:** XXXX  
**Email:** XXXX  
**Phone:** XXXXX  
**Office Hours:** XXXXXXXXXXXX

## Course Description

This course focuses on knowledge and skills essential for developing core skills in fiscal management (which will include issues of budgeting, understanding balance sheets, audits, and theories of accounting) and resource development (including fund raising, grant writing and personnel policies) for social work leaders.

## Course Competencies

Council on Social Work Education (CWSE) 2015 EPAS Competencies addressed by this course.

### Primary

- 6, 7, 8, 9: Engage, assess, intervene, and evaluate with organizations.

## Course Objectives

- S662-01** Demonstrate and recognize basic principles and theories of accounting (including cash vs. accrual accounting; assets & liabilities management, balance sheet structure and function, depreciation, auditing, etc.) in social service agencies.
- S662-02** Formulate and construct a comprehensive budget composed of multiple funding sources and multiple programs and demonstrate the ability to manage budget cuts as well as program expansion ensuring continuity of mission.
- S662-03** Design a comprehensive resource development plan for supporting comprehensive budget.
- S662-04** Analyze and apply the duties of executive directors, boards, and others as it relates to the fiscal aspects of agency management in an equitable and efficient manner.
- S662-05** Analyze and evaluate fiscal data in accordance with the values and ethics of social service practice.
- S662-06** Acquire and access the necessary technological skills to effectively and efficiently manage social service delivery.

## Required Texts

Miner, J. T., & Miner, L. E. (2013). *Proposal Planning & Writing*. Santa Barbara, CA: Greenwood.

Weikart, L., Chen, G., & Sermier, E. (2013). *Budgeting & Financial Management for Nonprofit Organizations*. Los Angeles, CA: Sage.



## Required Readings: posted on Canvas or in S664 required texts

- Akingbola, K. (2015). *Managing Human Resources for Nonprofits*. (pp. 193-217) Florence, US: Routledge.
- Boyd, W. L., & Carmedelle Frey, J. (2012). *Guidebook for Directors of Nonprofit Corporations*. (pp. 257-276) Chicago, IL: American Bar Association.
- Brinckerhoff, P. (2004). Financial Stewardship. *Nonprofit Stewardship, A Better Way to Lead Your Mission-Based Organization*. (pp. 139-172) Saint Paul, MN: Wilder Publishing Center.
- Glasby, J. (2001). Money talks: the role of finance in social work education and practice. *Social Work Education*, 20, 4, 494-498.
- Martin, L.L. (2001). Setting Fees. In K. Hansen, *Financial management for human service administrators*. (pp. 149-160) Boston, MA: Allyn & Bacon.
- Martin, L.L. (2001). Government Contracts and Grants. In K. Hansen, *Financial management for human service administrators*. (pp. 161-173) Boston, MA: Allyn & Bacon.
- Mayers, R. S. (2004). Marketing and Fundraising. *Financial Management For Nonprofit Human Service Organizations*. (pp. 97-124) Springfield, IL: Charles C Thomas.
- Miller, C. (2005). The Looking-Glass World of Nonprofit Money: Managing in For-Profits' Shadow Universe. *The Nonprofit Quarterly*, 12, 1.
- Pynes, J. P. (2009). *Human Resources Management for Public and Nonprofit Organizations*. (pp. 251-283) San Francisco, CA: John Wiley & Sons, Inc.
- Pynes, J. P. (2009). *Human Resources Management for Public and Nonprofit Organizations*. (pp. 284-307) San Francisco, CA: John Wiley & Sons, Inc.
- Reamer, F. G. (2007). Conducting an Ethics Audit. *Social Work Today*, 7, 1.
- Renz, D. O. (2010). *The Jossey-Bass Handbook of Nonprofit Leadership and Management*. (pp. 301-328) San Francisco, CA: Jossey-Bass.
- Renz, D. O. (2010). *The Jossey-Bass Handbook of Nonprofit Leadership and Management*. (pp. 329-346) San Francisco, CA: Jossey-Bass.
- Renz, D. O. (2010). *The Jossey-Bass Handbook of Nonprofit Leadership and Management*. (pp. 461-481) San Francisco, CA: Jossey-Bass.
- Renz, D. O. (2010). *The Jossey-Bass Handbook of Nonprofit Leadership and Management*. (pp. 642-666) San Francisco, CA: Jossey-Bass.
- Schwartz, T. & McCarthy, C. (2007). Manage Your Energy, Not Your Time. *Harvard Business Review*.
- Worth, M. J. (2016). Corporate Support. *Fundraising, Principles and Practice*. (pp. 247-272) Thousand Oaks, CA: Sage Publications.
- Worth, M. J. (2016). Foundation Support. *Fundraising, Principles and Practice*. (pp. 273-298) Thousand Oaks, CA: Sage Publications.

Additional articles will be posted on Canvas.



## Course Content

This course provides students with a foundation for fiscal management, marketing, and resource development in social service organizations. It examines the development of budgets-revenue and expenses, marketing of an organization for resource development, grant writing, and ethical and risk management concerns. It also cultivates an understanding of how an organization manages its finances in order to be sustainable.

As part of this course, students will learn how the unique nature of leader's financial management practices serves to sustain organizations to affect change in them and in their communities. Diversity, social justice, values, ethical issues, and risk management are presented throughout the content of the course as they relate to fiscal management, marketing and resource development. A variety of teaching and learning activities will be used during class sessions. These include but are not limited to the following: lectures, class discussions and exercises, homework, videos, and small group work.

The major evaluation of students' progress in accomplishing the learning objectives of this course is through the development of a budget, a grant proposal, and the final exam which encompasses all components of the fiscal management, marketing and resource development for an organization. Students will work individually to present their organization and its budget as well as a grant proposal to fund it. The students' mastery of understanding the fiscal management, marketing, and resource development of an organization will be demonstrated through a final exam. Students' will have the opportunity to choose whether to work individually or in a small group to analyze an organization's budget and fiscal policies or a topic related to fiscal management that impacts the field of Social Work. Students' professionalism and participation are also evaluated through a self-assessment rubric.

**Be mindful that academic and experiential content in social work courses may trigger an emotional response, especially in individuals who have prior trauma history. As social workers, it is our responsibility to be present for clients who have experienced trauma; therefore, it is necessary to cultivate compassionate self-awareness and address our personal histories in a timely manner for competent social work practice. If you are triggered in the classroom, your priority is self-care as well as continuing to gain knowledge for practice. You may need to seek consultation from faculty as to your readiness for practice and/or how to better prepare for social work practice.**

## Resources

- Canvas email will be used a way to communicate between instructor and students. You are expected to check the course announcements on Canvas before each class.
- Additional readings will be assigned throughout the semester and be posted on Canvas (Resource tab).

## Course Outline- See Modules on Canvas Site

## Assignments and Grading

More specific instructions for each assignment will be posted on Canvas. Instructor also will discuss details or answer any questions related to assignment during the class and office hours.

All assignments should be double spaced, with one-inch margins on all sides, carefully edited and proofed, using no smaller than a 12 point font, and conforming to APA style (6th ed.)



## Assignments

1. Budget A
  - a. DUE: .....September 28, 2017
  - b. Points: 15
2. Budget B
  - a. DUE: .....October 19, 2017
  - b. Points: ..... 15
3. Budget C
  - a. DUE: .....November 2, 2017
  - b. Points: .....15
4. Analysis Paper (individual or groups of 2-3)
  - a. DUE: .....November 9, 2017
  - b. Points: ..... 40
5. Grant Presentation and Proposal
  - a. DUE: .....November 16, 2017
  - b. Points: ..... 60
6. Grant Presentations Review and Comments
  - a. DUE: .....December 7, 2017
  - b. Points: .....10
7. Fiscal Management, Budgeting, and Resource Development Quiz
  - a. DUE: .....December 7, 2017
  - b. Points: ..... 35
8. Professional Participation
  - a. DUE: .....December 7, 2017
  - b. Points: .....10

## Grading Standards

Papers are graded on the quality of the final product not on the effort you extended completing them. The grade of A is reserved for truly outstanding work that goes beyond basic requirements.

In the Indiana University School of Social Work MSW program, grades of B are the expected norm. Reflecting competency and proficiency, grades of B reflect good or high quality work typical of graduate students in professional schools. Indeed, professors typically evaluate students' work in such a way that B is the average grade. Grades in both the A and the C range are relatively uncommon and reflect work that is significantly superior to or significantly inferior, respectively, to the average, high quality, professional work conducted by most IU MSW students. Because of this approach to grading, students who routinely



earned A grades in their undergraduate studies may conclude that a B grade reflects a decrease in their academic performance. Such is not the case. Grades of B in the IU MSW program reflect the average, highly competent, proficient quality of our students. In a sense, a B grade in graduate school is analogous to an A grade in undergraduate studies. MSW students must work extremely hard to achieve a B grade. If you are fortunate enough receive a B, prize it as evidence of the professional quality of your work.

Grades of A reflect Excellence. Excellent scholarly products and academic or professional performances are substantially superior to the “good,” “the high quality,” “the competent,” or the “satisfactory.” They are unusual, exceptional, and extraordinary. Criteria for assignments are not only met, they are exceeded by a significant margin. Excellence is a rare phenomenon. As a result, relatively few MSW students earn A grades.

Grades of B signify good or high quality scholarly products and academic or professional performance. Grades in the B range reflect work expected of a conscientious graduate student in a professional program. Criteria for assignments are met in a competent, thoughtful, and professional manner. However, the criteria are not exceeded and the quality is not substantially superior to other good quality products or performances. There is a clear distinction between the good and the excellent. We expect that most MSW students will earn grades in the B range—reflecting the good or high quality work expected of competent future helping professionals.

Grades of C and C+ signify work that is marginal in nature. The scholarly products or professional performances meet many but not all of the expected criteria. The work approaches but does not quite meet the standards of quality expected of a graduate student in a professional school. Satisfactory in many respects, its quality is not consistently so and cannot be considered of good or high quality. We anticipate that a minority of MSW students will earn C and C+ grades.

Grades of C- and lower reflect work that is unsatisfactory. The products or performances do not meet several, many, or most of the criteria. The work fails to approach the standards of quality expected of a graduate student and a future MSW-level professional. We anticipate that a small percentage of MSW students will earn unsatisfactory grades of C-, D, and F.

### *Grading scale*

Grade minimums are as follows [Note: grades below C are Unsatisfactory in the MSW Program]:

A	93%	Excellent, Exceptional Quality
A-	90%	Superior Quality
B+	87%	Very Good, Slightly Higher Quality
B	83%	Good, High Quality (expected of most MSW students)
B-	80%	Satisfactory Quality
C+	77%	Marginal, Modestly Acceptable Quality
C	73%	Marginal, Minimally Acceptable Quality
C-	70%	Unsatisfactory Quality



## Course Policies

### Assignment

Students are expected to submit all assignments on time. If you need to extend a deadline you MUST speak to me in advance of the due date to get an approval and an agreement will be reached. Late submission (except by prior agreement) will be marked down 5% per day late. IU has a subscription with the Turnitin plagiarism detection service, and faculty members have the right to submit student papers to the service to check for originality. Turnitin.com service will be used for all student papers in this course.

### Attendance and participation

Students are expected to attend and participate in all class sessions. Students should complete readings and homework as assigned and come to class prepared for discussion and questions. Because of the nature of this course and assignments, regular attendance is required and extremely important. Class attendance and active participation in class activities are considered essential for the satisfactory completion of the course objectives. If you are absent, it is your responsibility to get notes from other students regarding materials covered during your absence. If you are absent on the day when an assignment is due, you need to submit your assignment before the beginning of the class. Missing more than 2 of the scheduled classes will result in a letter-grade deduction for the course. Late arrivals and early departures will also lead to course point deductions. It's up to instructor's discretion to decide the deduction points. If you miss five or more classes you will fail the course.