

**University of North Carolina at Chapel Hill
School of Social Work**

COURSE NUMBER: Social Work 249
COURSE TITLE: Management and Community Practice
INSTRUCTOR: Richard L. Edwards, Ph.D., ACSW
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OFFICE HOURS: Mondays, 1-2 PM and/or by appointment
SEMESTER: Fall, 2002

COURSE DESCRIPTION: Examines social work leadership in management and community practice within complex political and economic environments, emphasizing social work values and intervention methods.

COURSE OBJECTIVES: Upon completion of the course the student will be able to demonstrate:

- Familiarity with current contextual trends and professional issues that shape and influence planning and managing human services at the organizational and community levels;
- Knowledge of and ability to appropriately use management and community practice “tools” and their applications in the management of programs, organizational units, and community development endeavors;
- Knowledge of and ability to use a framework for applying management strategies and decision making processes so that organizations can support family needs and build upon community needs and assets;
- Ability to articulate and apply social work values and ethics and professional practice principles as these relate to human services management and community practice;
- Understanding of and ability to participate in and lead self-directed project teams;
- Appreciation for and comfort with the competing demands that multiple stakeholders place on human services organizations;
- Understanding of what it takes to build a culturally competent organization including the ability to recruit and manage a diverse workforce and develop an organizational culture that appreciates the strengths of oppressed populations.

REQUIRED TEXTS:

Edwards, R.L., Yankey, J.A. and Alpeter, M.A. (Eds.). (1998) *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press.

Edwards, R.L. (Ed.-in-chief). (1995). *Encyclopedia of social work--19th edition*. Washington, DC: NASW Press.

Fauri, D.P., Wernet, S.P. and Netting, F. E. (2000). *Cases in macro social work practice*. Needham Heights: Allyn & Bacon.

RELATED TEXTS:

These are not required. However, students may find them helpful in supplementing their knowledge in specific areas.

Kahn, S. (1991). *Organizing: A guide for grassroots leaders* (rev. ed.). Washington, DC: NASW Press.

Kahn, S. (1994). *How people get power* (rev. ed.). Washington, DC: NASW Press.

Quinn, R.E., Faerman, S.R., Thompson, M.P., & McGrath, M.R. (1990). *Becoming a master manager*. New York, NY: John Wiley & Sons.

Rivera, F. and Erlich. (1995). *Community organizing in a diverse society*. Needham Heights: Allyn & Bacon.

Tropman, John E. (1997). *Successful community leadership*. Washington, DC: NASW Press.

The following websites may be helpful:

1. <http://www.npr.gov/library/siteindex.html> (Gov. “reengineering”)
2. <http://pages.nyu.edu/socialwork/wwwrsw.htm> (social work reference library)
3. <http://www.bolder.com/res02.htm> (redefining “work”)
4. <http://www.ssa.uchicago.edu/links.html> (more social work references)
5. <http://www.not-for-profit.org/> (reference index)

6. <http://unitedway.org/outcomes> (outcomes)
7. <http://www.nonprofit.gov> (reference index)

TEACHING METHODS:

This course is designed as a seminar in which participants explore issues, approaches, and options related to human services management and community practice skills. This course will use a variety of teaching and learning methods, including lectures, small and large group discussions, and student group projects. Selected community practitioners and School of Social Work or other University faculty will serve as course resources on specific topics.

Students are expected to actively participate, drawing from assignments, readings, field placements, and their other previous or current work experiences. The instructor will be available during office hours or by appointment, and by telephone and Email to address questions that may arise between class sessions.

The development of a supportive learning environment, reflecting the values of the social work profession, is essential for the success of this class. The contributions of students to making this a safe and respectful class for learning and growth will be noted and appreciated.

CLASS ASSIGNMENTS:

Several methods will be used to determine students' progress in the class and achievement of the course objectives. The assignments are described below and will be discussed more thoroughly in class sessions. All written assignments should use references following APA style and be typed or word processed using correct grammar, punctuation and spelling.

Seminar Participation (15% of final grade)

This course is structured as a graduate seminar requiring the active participation of members. This means that participants will be called on to use the following skills: actively listening to the ideas and views of others; being able to understand and appreciate a point of view which is different from your own; articulating clearly your point of view; linking experience to readings and assignments; sharing personal ideas and constructs; clarification and testing of presumed communications; providing effective and appropriate feedback; openly receiving feedback; collaboratively pursuing questions and ideas; and constructing conceptual frameworks and paradigms in a co-production process. An effective seminar enables participants to examine new ideas, demonstrate new skills and abilities, and to have them validated by peers in a risk free environment.

Assignment # 1-- Personal Assessment of Managerial Skills (15% of final grade)

Complete the Competing Values Managerial Practices Survey (p.18 of primary text). Score the assessment using the scoring protocol (p. 19) and transfer your scores to the Competing Values Skills Assessment Leadership Profile (p. 20). Then answer discussion questions 1. and 2. on p. 19. Your answers should be no more than a total of four typed, double-spaced pages, plus a copy of your profile. **Due Date: September 9**

Assignment # 2 – Three Case Analyses (30% of final grade—10% each)

Throughout the semester students will work in teams to review and discuss cases in management and community practice. Individually, class members will independently review three of the assigned cases from the Fauri, Wernet, and Netting text and respond in writing to the questions at the end of the case. The written assignment for each case should not exceed four typed, double-spaced pages.

Assignment #3—Group Presentation (10% of final grade)

Each team will be responsible for making a class presentation and leading class discussion on one of the cases. “Preparation by class members of each case prior to discussion is essential for good learning outcomes, as is willingness to constantly fuse the best of individual contributions and group discussion (Fauri, D., Wernet, S.P., and Netting, E. p. xxii).

Case presentations should include the following elements:

- Identification of the setting – time and place;
- The situation – major events and plot line;
- Exposition – things to be aware of that took place prior to the beginning of the case;
- Listing of the key roles – characters in the case;
- Related theories, concepts and skills;
- Recommendations – summary of discussion.

Assignment #4 –Two Written Assignments (30% of final grade, 15% each)

Drawing upon assigned readings, information presented in classes, and other reading you may do, complete two assignments from the following list. The first assignment will be due on Oct. 21 and the second will be due on November 25. Some of the exercises have been selected from the primary course text, *Skills for Effective Management of Nonprofit Organizations*.

- Leadership and change management– Describe the overall experience of your organization, of an organization with which you are familiar, or of your own personal experience, in leading and managing innovation. What change initiatives or planned innovations have been implemented? What change

initiatives have fallen by the wayside? What do you think accounts for the success or failure of these change initiatives?

- Managing Human Resources – (select either a. or b.)
 - a. Skills Application Exercise – Chapter 10, pg. 214. Complete the scale on pg. 215. Think about how these results could be used in your organization. Can the results be used to stimulate discussion? Is there a basis here for further study, problem-solving, or planned action to improve the work environment? What kinds of mechanisms and forums can be established in your organization to address the results?
 - b. Obtain the performance evaluation instrument from your field agency or job site and interview the individuals responsible for overseeing performance evaluation (most likely the director of human resource management or the chief executive officer). Learn all you can about the organization’s performance evaluation system and process. Using the characteristics of the ideal performance evaluation system detailed in Chapter 11, assess the organization’s performance evaluation system in terms of its strengths and weaknesses. If you were a consultant to this organization, what steps would you take to bring it in more in line with the “ideal system”?
- Computing and Information Technology – Assess the current state of information technology in your field practicum and then develop a proposed three-year budget for upgrading computers and computing skills.
- Mergers and Consolidations – Using your field agency, employment site, or another organization with which you have had experience, complete the Skills Application Exercise in Chapter 23, pg. 502.
- Fundraising –Drawing upon material in Chapter 4 of the primary text, analyze the culture of giving in your organization or another nonprofit with which you are familiar. Assess the organization’s readiness for a fundraising campaign in accordance with the questions at the bottom of p. 73. Indicate how would you create or enhance the organization’s culture of giving?
- Strengthening Board Performance – Complete the Skills Application Exercise, Chapter 20, pp. 446-447.
- Managing Strategically – Scan the external and internal environments of your field practicum, employment site, or another organization with which you are familiar. Identify major trends and conditions and assess the organization’s resources and its strengths and weaknesses. On the basis of this scan, identify some strategic issues that this organization may need to address and evaluate

the potential costs (direct or in lost benefits) of not addressing each issue. Select one of the most critical issues and identify possible initiatives to address that issue, including what you view as the costs in terms of time, money, political capital, etc.

COURSE EVALUATION:

Seminar Participation	15%	
Managerial Skills Assessment		15%
Case Analyses (10% each)	30%	
Group Presentation	10%	
Portfolio Assignments (15% each)	<u>30%</u>	
	100%	

GRADING SYSTEM:

The scores for each assignment will be combined and converted to the following scale for final grading:

94-100	H
80-93	P
70-79	L
69 and below	F

POLICY ON INCOMPLETES AND LATE ASSIGNMENTS:

A grade of **Incomplete** will be given only in extenuating circumstances and in accordance with University policy. Assignments are due **IN CLASS** on the day noted in this course outline. Late assignments, meaning those not handed in on the day due, will be **reduced 5 points** for each day they are late. Please plan your schedule so that you will have assignments completed on time.

POLICY ON ACADEMIC DISHONESTY:

Please refer to the *APA Style Guide* and the *School of Social Work Manual* for information on attribution of quotes, plagiarism and appropriate uses of assistance in preparing assignments. All written assignments should contain a signed pledge from you stating that, “I have not given or received unauthorized aid in preparing this written work”.

In keeping with the UNC Honor Code, if there is reason to believe that academic dishonesty has occurred, a referral will be made to the Office of the Student Attorney General for investigation and further actions as required.

READINGS AND COURSE OUTLINE

The format for this course is based on the assumption that students are prepared and active learners. Reading the assigned materials prior to the for which they are assigned is a prerequisite to getting the most out of class sessions and successfully meeting the course objectives.

Monday, August 26

- **Course Overview/Organization**
- **Establishing a Teaching/Learning Community**
- **Working Effectively in Teams**

Monday, September 2 – no class (Labor Day Holiday)

Monday, September 9 – Community and Organizational Leadership –

- **Competing Values Framework**
- **Critical Issues in Effective Leadership**

Readings:

Edwards, R.L., Austin, D.M. & Altpeter, M.A. (1998). Managing effectively in an environment of competing values. In Edwards, R. L., Yankey, J.A. & Altpeter, M.A. (Eds). Skills for effective management of nonprofit organizations. Washington, DC: NASW Press, **pp.5-21**.

Fauri, D.P., Wernet, S.P. and Netting, F. E. (2000). *Cases in macro social work practice*. Needham Heights: Allyn & Bacon, **Chapters 2 and 5**.

Assignment 1 due!

Monday, September 16 – Community and Organizational Leadership

**Guest Instructor: Dr. Marie Weil, Berg-Beach Professor
UNC-CH School of Social Work**

- **Models of Community Practice and Leadership**
- **Approaches to Problem-Solving and Decision-Making**

Readings:

Weil, M. O. and Gamble, D. N. (1995). Community practice models. In R. L. Edwards (Ed.-in-chief). *Encyclopedia of Social Work—19th Edition*. Washington,DC: NASW Press, **pp. 577-594**.

Fauri, D.P., Wernet, S.P. and Netting, F. E. (2000). *Cases in macro social work practice*. Needham Heights: Allyn & Bacon, **Chapters 9, 10 and 14**.

Monday, September 30—Boundary Spanning

- **Innovation and change**
- **Fundraising**
- **Media Relations and Marketing**
- **Public Policy Advocacy**

Readings:

Eadie, D. C. (1998). Building the capacity to lead innovation. In Edwards, R. L., Yankey, J.A. & Altpeter, M.A. (Eds). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, **pp. 27-44**.

Henry, C. E. (1998). Effective proposal writing. In Edwards, R. L., Yankey, J.A. & Altpeter, M.A. (Eds). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, **pp. 45-58**.

Benefield, E. A. S. and Edwards, R. L. (1998). Fundraising. In Edwards, R. L., Yankey, J.A. & Altpeter, M.A. (Eds). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, **pp. 59-78**.

Cohen, T. (1998). Media relationships and marketing. In Edwards, R. L., Yankey, J.A. & Altpeter, M.A. (Eds). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, **pp. 98-114**.

Pelton, E. D. & Baznik, R. E. (1998). Managing public policy advocacy and government relations. In Edwards, R. L., Yankey, J.A. & Altpeter, M.A. (Eds). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, **pp. 115-152**.

Monday, October 7--Assessing Organizational and Community Culture/Managing Diversity

**Guest Instructor: Dr. Margaret Spearmon, Director of Field Education
UNC-CH School of Social Work**

- **Organizational Culture**
- **Organizational Issues Related to Diversity**
- **Managing Diverse Workforce**

Readings:

Bailey, D. (1995). Management: Diverse workplaces. In Edwards, R. L. (Ed-in-chief). *Encyclopedia of social work-19th ed.* Washington, DC: NASW Press, **pp. 1659-1663.**

Chernesky, R. H. (1998). Advancing women in the managerial ranks. In Edwards, R. L. (Ed-in-chief). *Encyclopedia of social work-19th ed.* Washington, DC: NASW Press, **pp. 200-218.**

Fauri, D.P., Wernet, S.P. and Netting, F. E. (2000). *Cases in macro social work practice.* Needham Heights: Allyn & Bacon. **Chapters 9 and 11.**

Gutierrez, L., Alvarez, A.R., Nemon, H. & Lewis, E.A. (1996). Multicultural Community Organizing: A Strategy for Change. *Social Work.* 41(5), **501-508.**

Nixon, R. & Spearmon, M. (1991). Building a pluralistic workplace. In R.L.Edwards & J.A. Yankey (Eds.). *Skills for effective human Services management.* Silver Spring, MD: NASW Press. **pp. 155-170.**

Monday, October 14--Computing and Information Technology

**Guest Lecturer: Dr. Laura Zimmerman, Director, SMART Agency
UNC-CH School of Social Work**

(Students will be divided into two groups, each of which will spend half the class period in the SSW Computer Lab.)

- **Role of Information Technology**
- **Managing the Technology Component**

Readings:

- Butterfield, W. H. (1995). Computer utilization. In Edwards, R. L. (Ed.-in-chief). *Encyclopedia of social work—19th edition*. Washington, DC: NASW Press, **pp. 594-613**.
- Fauri, D.P., Wernet, S.P. and Netting, F. E. (2000). *Cases in macro social work practice*. Needham Heights: Allyn & Bacon. **Chapter 3**.
- Zimmerman, L. I. & Broughton, A. (1998). Assessing, planning and managing information technology. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, **pp. 325- 342**.
- Schoech, D. (1995). Information systems. In Edwards, R. L. (Ed.-in-chief). *Encyclopedia of social work-19th edition*. Washington, DC: NASW Press, **pp. 1470-1478**.

Monday, October 21—Managing With Diminishing Resources/Organizational Change

**Guest Lecturer: Mr. Daniel Lebold, MSW, Assoc. Executive Director
Triangle Family Services
Raleigh, NC**

- **Managing With Less**
- **Dealing With Change**

Readings:

- Edwards, R. L., Lebold, D.A., & Yankey, J. A. (1998). Managing organizational decline. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, **pp. 279-300**.
- Fauri, D.P., Wernet, S.P. and Netting, F. E. (2000). *Cases in macro social work practice*. Needham Heights: Allyn & Bacon. **Chapter 7**

Monday, October 28—Managing Human Resources

**Guest Lecturer: Dr. Kim Strom-Gottfried, Associate Professor
UNC-CH School of Social Work**

- **Recruitment**
- **Hiring**
- **Evaluating**

- **Dismissing**

Readings:

- Pecora, P. J. (1998). Recruiting and selecting effective employees. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, **pp. 155-184.**
- Millar, K. I. (1998). Evaluating employee performance. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, **pp. 219-243.**
- Singer, T. L. (1995). Sexual harassment. In Edwards, R. L. (Ed-in-chief). *Encyclopedia of social work—19th edition*. Washington, DC: NASW Press, **pp. 2148-2156.**
- Rivas, R. F. (1998). Dismissing problem employees. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, **pp. 262-278.**

Monday, November 4—Fiscal Management/Ethical Issues In Organization and Community Practice

**Guest Lecturer: Ms. Amy S. D’Aprix, MSW, President
Amy D’Aprix and Associates, Inc.
Chapel Hill, NC**

- **Budgeting**
- **Financial Statements**
- **Audits**
- **Ethics and Risk Management**

Readings:

- Strachan, J. L. (1998). Understanding nonprofit financial management. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, **pp. 343-370.**
- Lohman, R. (1995). Financial management. In Edwards, R. L. (Ed-in-chief). *Encyclopedia of social work—19th edition*. Washington, DC: NASW Press, **pp. 1028-1036.**
- Reamer, F. G. (1995). Ethics and values. In Edwards, R. L. (Ed-in-chief). *Encyclopedia of social work-19th ed.* Washington, DC: NASW Press, **pp. 893-902.**

Kurzman, P. A. (1998). Managing risk in nonprofit settings. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, pp. 406-420.

Monday, November 11—Measuring Outcomes/Collaborative Ventures

**Guest Lecturer: Dr. Lynn Usher, Kuralt Professor of Public Policy
UNC-CH School of Social Work**

- **Political Context of Evaluation**
- **Evaluation Models**
- **Managing for Quality**
- **Mergers and Consolidations**

Readings:

Meier, A. & Usher, C. L. (1998). New approaches to program evaluation. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, pp. 371-405.

Keys, P. R. (1995). Quality management. In Edwards, R. L. (Ed-in-chief). *Encyclopedia of social work*. Washington, DC: NASW Press, pp. 2019-2025.

Yankey, J. A., Wester, B., & Campbell, D. (1998) Managing mergers and consolidations. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, pp. 492-503.

Monday, November 18—Faith Communities/Board Leadership

**Guest Lecturer: Rev. John Bush, Executive Director
Step-Up Ministry
Raleigh, NC**

- **Role of Faith Communities in Service Delivery**
- **Working With Boards**

Readings:

Fauri, D.P., Wernet, S.P. and Netting, F. E. (2000). *Cases in macro social work practice*. Needham Heights: Allyn & Bacon, **Chapter 11**

Gelman, S. R. (1995). Boards of directors. In Edwards, R. L. (Ed-in-chief). *Encyclopedia of social work—19th edition*. Washington, DC: NASW Press, pp. 305-312.

Holland, T. P. (1998). Strengthening board performance. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, pp. 425-452.

Monday, November 25—Managing Strategically/Using Consultants

- **The Planning Process**
- **Assessing Strengths, Weaknesses, and Opportunities**
- **Developing Strategy and Managing the Effort**
- **Using Consultants**

Readings:

Eadie, D. C. (1998). Planning and managing strategically. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, pp. 453-468.

Fauri, D.P., Wernet, S.P. and Netting, F. E. (2000). *Cases in macro social work practice*. Needham Heights: Allyn & Bacon, **Chapters 4, 9 and 10**.

Yankey, J. A. (1995). Strategic planning. In Edwards, R. L. (Ed-in-chief). *Encyclopedia of social work—19th edition*. Washington, DC: NASW Press, pp. 2321-2327.

Yankey, J. A. (1998) Selecting and using consultants. In Edwards, R. L., Yankey, J. A. & Altpeter, M. A. (Eds.). *Skills for effective management of nonprofit organizations*. Washington, DC: NASW Press, pp. 504-521.

Monday, December 2--LAST CLASS!!

- **Starting a nonprofit organization**
- **Course wrap-up**

