

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

Course Number: SOWO 799-001

Course Title: Interventions with Organizations and Communities, Spring 2016

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Office Hours: Tuesdays 12-1pm, other times by appointment

COURSE DESCRIPTION: This course builds upon SOWO 570 to equip students with the skills and knowledge to influence and implement organizational and community change.

COURSE OBJECTIVES

This section of Interventions with Organizations and Communities will focus on developing new programs to meet the needs of underserved communities. The course will offer students the opportunity to build on projects they began in *Social Work Practice with Organizations and Communities* (SOWO 570) by researching best practices, evidence based practices, and promising practices necessary to achieve the outcomes students propose for a target population. Students will then create a program development plan in which they identify staffing needs, create job descriptions, delineate a budget, and recommend funding sources. Students will deliver the finished program development plan to their field placement or another organization with the capacity to assess practical considerations for implementation.

REQUIRED TEXTS

American Psychological Association. (2009). *Publication manual of the American Psychological Association, 6th Edition*. Washington, D.C.: American Psychological Association.

ADDITIONAL READINGS & RESOURCES

Additional required readings are listed below in the weekly class schedule and are available on the class Sakai site. All course lectures, syllabus, assignment information, and external links to useful web sites are or will be available on Sakai, at <https://sakai.unc.edu/portal>

TEACHING METHODS

My goal is to make course content as practical as is possible in a classroom setting. We will use case examples, guest speakers, multimedia, problem-solving exercises and discuss students' field placements, class projects and prior professional experiences. Students' active participation is critical.

CLASS ASSIGNMENTS

Student performance will be evaluated based on the following assignments. All assignment descriptions are listed at the end of the syllabus.

Requirement	Due Date	Percent
Class Participation & Attendance	Ongoing	15
Job Description, Hiring & Supervision Plan	Class #4	15

Full Cost Recovery Budget	Class #5	15
Resource Development Plan	Class #7	15
Final Presentation	Class #7	20
Completed Program Plan	Due one week after the last day of class	20

Class Participation & Attendance

It is expected that students will be active members of the class. Therefore, participation will be judged by attendance and the degree to which students are prepared for class and participate in class discussions, exercises, role plays and other learning activities. Full credit will only be awarded to students who arrive to all class sessions on time, stay for the entire duration of the class, and demonstrate that they have completed assigned tasks.

EXPECTATIONS FOR WRITTEN ASSIGNMENTS

All written assignments should be submitted electronically through the dropbox on the Sakai site for this course.

Students are expected to use good academic English; grades will be lowered for poor grammar, syntax, or spelling. Those who have difficulty writing are STRONGLY encouraged to use online resources of the campus Writing Center (<http://www.unc.edu/depts/wcweb/>) and/or seek assistance from Diane Wyant or Susan White in the School of Social Work.

The School of Social Work faculty has adopted APA style as the preferred format for papers and publications. **All written assignments for this course should be submitted in APA style.** Exceptions to this requirement are that students are expected to format and present their written work based on 1) assignment instructions and 2) single spacing and any format the student desires for presenting bulleted and numbered lists, tables, charts and other in-text objects that results in a professional and attractive presentation expected by human service organizations.

Information concerning APA style and writing resources are listed below:

- ❑ <http://www.apastyle.org/eleceref.html> (APA Style for material in electronic formats)
- ❑ http://owl.english.purdue.edu/handouts/research/r_apa.html (general information about documentation using APA style)
- ❑ <http://www.bartleby.com/141/> (electronic version of Strunk's *The Elements of Style* which was originally published in 1918)
- ❑ <http://www.fas.harvard.edu/~wricntr/resources.html> (The Writing Center, links to on-line reference material and many other useful sites for authors)
- ❑ <http://www.unc.edu/depts/wcweb/> (The UNC writing center—on-line and tutorial help at Phillips Annex 962-7710)

GRADING SYSTEM

The School of Social Work operates on an evaluation system of Honors (H), Pass (P), Low Pass (L), and Fail (F). The numerical values of these grades are:

H: 94-100

P: 80-93

L: 70-79

F: 69 and lower

A grade of P is considered entirely satisfactory. The grade of Honors (“H”) — which only a limited number of students attain — signifies that the work is clearly excellent in all respects.

POLICY ON INCOMPLETES AND LATE ASSIGNMENTS

A paper is considered late if it is handed in any later than the start of class on the day it is due. The grade for late papers will be reduced 10% per day, including weekends. Therefore, a paper that would merit a grade of 100 on Friday will receive a grade of 70 if submitted on Monday. Similarly, a paper due at 2pm on Monday handed in at 3pm will be considered one day late.

A grade of “Incomplete” is given only in exceptional and rare circumstances, such as family crisis or serious illness. It is the student’s responsibility to request and explain the reasons for an incomplete. The instructor has no responsibility to give an incomplete without such a request.

POLICY ON RESUBMITTING WORK

Students have the option of resubmitting **one** assignment during the course of the semester. Students who wish to resubmit work must discuss this with the instructor, and they must turn in revised work within one week of receiving the original graded assignment. The highest grade possible on a resubmitted assignment is 80 out of 100 points.

POLICY ON ACADEMIC DISHONESTY

It is the responsibility of every student to obey and to support the enforcement of the Honor Code, which prohibits lying, cheating, or stealing in actions involving the academic processes of this class. Students will properly attribute sources used in preparing written work and will sign a pledge on all graded coursework certifying that no unauthorized assistance has been received or given in the completion of the work. **All written assignments should contain a signed pledge stating: “I have not given or received unauthorized aid in preparing this written work.”** Credit will not be awarded for unpledged work. Please refer to the *APA Style Guide*, *The SSW Manual*, and the *SSW Writing Guide* for information on attribution of quotes, plagiarism (including self-plagiarism, or submitting work that has been previously submitted in another course) and appropriate use of assistance in preparing assignments. In keeping with the UNC Honor Code, if reason exists to believe that academic dishonesty has occurred, a referral will be made to the Office of the Student Attorney General for investigation and further action as required.

POLICY ON ACCOMMODATIONS FOR STUDENTS WITH DISABILITIES

Students with disabilities that affect their participation in the course and who wish to have special accommodations should contact the University’s Disabilities Services (<http://disabilityservices.unc.edu>) and provide documentation of their disability. Disabilities Services will notify the instructor that the student has a documented disability and may require accommodations. Students should discuss the specific accommodations they require (e.g. changes in instructional format, examination format) directly with the instructor.

POLICIES ON THE USE OF ELECTRONIC DEVICES IN THE CLASSROOM

Use of all electronic devices is prohibited. Please set your cell phones to vibrate. Use of laptops is permitted as a tool for small group activities and in-class assignments or as an approved accommodation for students with disabilities (see above).

Class Schedule & Reading Assignments

Class 1 January 11	Introduction to the Course Planning Community and Organizational Interventions Revisiting the Logic Model
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Objectives

1. Introductions and project group formation
2. Course overview and syllabus review
3. Review of student projects from SOWO 570
4. Discuss EBP and its relationship to planning interventions
5. Assess the fit between an organization and the programs within it: Mission and mission drift
6. Critically analyze your proposed program or intervention's intended outcomes & theory of change
 - What needs are you intending to meet?
 - What level of change are you planning for?
 - Assess your logic model's effectiveness at explaining the proposed program to your organization

Bring to Class: A copy of your SOWO 570 logic model and a logic model from your organization

Readings

Martin, L.L. (2009). Program planning and management. In R.J. Patti (Ed.), *The handbook of human services management* (pp. 339-350). Thousand Oaks, CA: Sage.

Class 2 January 25	Recruiting & Hiring Staff
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Objectives

1. Understand how program structure and function affect the development of staffing plans
2. Identify methods to recruit a skilled and diverse staff appropriate for the program
3. Practice developing a job description that articulates the knowledge, skills and attitudes needed for a successful program
4. Compare with job descriptions already in the chosen agency
5. Assess how the current structure and culture of the agency will affect your program plans
6. Assess current agency diversity and address gaps in your hiring plan

Bring to Class:

- 1) A copy of your SOWO 570 organizational assessment and organizational chart
- 2) A copy of a job description from your organization

Readings

Bridgespan Group. (2008). Recruiting diverse talent.

The Community Tool Box. (2011). Chapter 10: Hiring and Training Key Staff of Community Organizations.

Watson, M. (2007). How charities can recruit diverse employees. (Opinion Piece). *Chronicle of Philanthropy*, 19(6).

Pecora, P.J. (2009). Managing human resources: Administrative issues. In R.J. Patti (Ed.), *The handbook of human services management* (pp. 255-268). Thousand Oaks, CA: Sage.

Class 3 Supervising & Supporting Staff
February 1

Objectives

1. Understand how program structure and agency culture affect supervision and management
2. Assess the role and function of management in the chosen agency
3. Develop a plan for supporting and monitoring staff work in your program

Bring to Class: a performance evaluation form from your organization

Readings

Gibelman, M., & Furman, R. (2013). *Navigating human service organizations* (3rd Ed.). Chicago, IL: Lyceum Books, Inc.

Chapter 5 – Supervision within the organization setting (pp. 93-115)

Chapter 6 – The work environment (pp. 116-138)

Pecora, P.J. (2009). Managing human resources: Administrative issues. In R.J. Patti (Ed.), *The handbook of human services management* (pp. 268-281). Thousand Oaks, CA: Sage.

Additional Resources

Gloensky, M. (2011). Strategic leadership and management in nonprofit organizations: Theory and practice. Chicago, IL: Lyceum Books, Inc.

Chapter 14 – Human Resources Management (pp. 245-265)

Vaughan, S.K., & Arsneault, S. (2014). Managing nonprofit organizations in a policy world. Washington, DC: Sage.

Chapter 13 – Managing Human Resources: Volunteers and Staff (pp. 297-324)

Class 4 Understanding Organizational Budgets
February 8

Objectives

1. Identify the challenges human service organizations face in financing their operations
2. Understand how HSOs are shaped by the political economies of different fields of practice
3. Describe full cost budgeting/recovery principles and practices
4. Create a full cost budget and budget justification for your program

Bring to Class: a program budget from your organization

Readings

Gibelman, M., & Furman, R. (2013). *Navigating human service organizations* (3rd Ed.). Chicago, IL: Lyceum Books, Inc.

Chapter 3 – How organizations are financed (pp. 51-77)

Optional: Chapter 9 – The changing environment of organizations (pp. 172-190)

Despard, M. (2008). *Introduction to budgeting*. Chapel Hill, NC: University of North Carolina School of Social Work.

Souders, T.M. (2013). *How to prepare a human service program budget*.

Kettner, P.M., Moroney, R.M., & Martin, L.L. (2008). *Designing and managing programs: An effectiveness-based approach*. Los Angeles: Sage.

Chapter 10 – Budgeting for control, management, and planning (pp. 207-219)

Class 5 **Finding Money to Pay for Your Program or Intervention**
February 15

Objectives

1. Identify key sustainability principles for human service organizations, including revenue diversification and operating reserves
2. Understand the key differences between restricted and unrestricted sources of revenue and general application procedures for grants

Bring to Class: A grant application from your organization (if available)

Readings

Worth, M.J. (2012). *Nonprofit management: Principles and practice* (2nd Ed.). Thousand Oaks, CA: Sage.

Chapter 11 – Philanthropic Fund-Raising (pp. 266-297)

Chapter 12 – Earned Income Strategies (pp. 298-321)

North Carolina Coalition Against Domestic Violence. (n.d.). *Wise women's favorite fundraising strategies*.

Class 6 **Funding Workshop**
February 22

Objectives

1. Articulate a strategy for financing a full cost program budget based on various resource development strategies

Guest Speaker: Graduate Funding Information Center (**class will meet in a computer lab on campus**)

Bring to Class: A resource development plan or database from your organization (if available)

Readings

Review the following North Carolina foundation websites to identify:

1. Funding areas/priorities
2. Application procedures and guidelines
3. Types of organizations and programs that are getting funded

<http://www.mrbf.org/>

<http://www.zsr.org/>

<http://www.kbr.org/>

<http://www.fundforsouth.org/>

Class 7 **Student Presentations**
February 29

Objectives

Students will present their program proposals in class before a visiting community practitioner

Assignments

Assignment #1	Job Description, Hiring & Supervision Plan (15% of final grade)
Due Class #4	

New programs require additional staff or – at the very least – dedicated staff time in order to be successful. Simply adding new tasks to the workload of existing staff is not a viable solution, nor is it reasonable to assume that an entire program can be carried out by volunteers. In addition, who will be responsible for orienting and supervising the staff or volunteers who will carry out program activities? Who will be accountable for measuring outcomes and allocating resources? The purpose of this assignment is to develop a plan to ensure that the organization has the right people in place to implement your program, and that they receive the appropriate supervision.

Part A: First, describe the staffing requirements for the program. Cite literature on the proposed intervention that provides justification for staffing. For example, do EBPs require that all therapists carrying out the intervention be licensed or certified? Does the intervention require multiple roles (ie, psychiatrist, therapist, and case manager)?

Part B: Describe your hiring plan, including the organization’s internal processes for posting positions, selecting and interviewing candidates, and making employment offers. Explain how issues of diversity will impact the program (for example, is it important the new hire be a member of the target population?), and provide detailed steps for advertising the position(s) that will ensure a diverse, qualified candidate pool. Cite literature to support these hiring practices.

Part C: Develop a plan for supervision. Include information on orientation and training that will be necessary to prepare the new hire(s) for successful integration into the agency. For example, will the organization’s existing orientation for new employees be sufficient, or will your program require additional orientation activities to help the new hire(s) understand how their position fits into the organization’s overall functioning? Provide a detailed plan for clinical and/or management supervision. For example, is specialized supervision required for therapists carrying out your EBP (as in the case of provisionally licensed LCASs)? Can that supervisor also provide feedback on completion of tasks in the job description, or will require an additional supervisor? What supervision style is currently used in the organization? Include citations to support the supervision plan.

Part D: Finally, develop a job description that matches the format and relevant content of other job descriptions in the agency, and that adequately prepares the new hire with job clarity and opportunities for job enhancement and enlargement.

Products Due:

- Description of Program Staffing Requirements
- Hiring Plan
- Supervision Plan
- Job Description

Grading Criteria	Points
Student clearly describes the staffing requirements for the program, and cites literature on the proposed intervention that provides justification for staffing.	25
The hiring plan provides detailed steps for advertising the position(s) that will ensure a diverse, qualified candidate pool. Cites literature to support hiring practices.	25
The supervision plan includes information on training and orientation necessary to prepare the new hire(s) for successful integration into the agency, completion of all tasks in the job description, and a detailed plan for clinical and/or management supervision. Inc. citations.	25

A job description is included that matches format and relevant content of other job descriptions in the agency, and adequately prepares the new hire with job clarity and opportunities for job enhancement and enlargement.	25
TOTAL	100

Assignment #2 Full Cost Recovery Budget (15% of final grade)
Due Class #5

New programs require additional resources to carry out program activities, pay staff, and cover indirect costs to the organization. Unanticipated or “hidden” costs can result in the program’s failure and can have devastating consequences for the host organization.

The purpose of this assignment is to develop a budget that anticipates all costs – direct, indirect, and administrative – and makes sure that costs will be covered by potential funders.

Part A: First, complete a full cost recovery budget on the template provided. Clearly identify all full, expected and reasonable costs of the program in the budget.

Part B: Write a budget justification narrative. This is a document that describes all costs identified in the budget and explains why they are necessary. Include citations where necessary; for example, cite resources that justify the salary range for new hires (especially if they represent positions that do not currently exist in the organization), and sources that explain why other expenses are required for the program (such as travel, curricula, staff training, or specific materials for activities, etc.)

Products Due:

- Full Cost Recovery Budget
- Budget Justification Narrative

Grading Criteria	Points
Full Cost Recovery Budget is well formatted, easy to read and understand.	30
Budget clearly identifies all full, expected and reasonable costs of the program.	30
Narrative clearly explains and justifies all major costs. Includes citations.	40
TOTAL	100

Assignment #3 Resource Development Plan (15% of final grade)
Due Class #7

New programs require additional funding to cover their costs, and that means seeking new funding sources or revenue streams.

The purpose of this assignment is to develop a plan for requesting the funds or generating the revenue necessary to cover all program costs.

Part A: You will provide a detailed description of the organization’s current funding structure. You may be able to start by reviewing your Organizational Assessment assignment from SOWO 570, but this assignment will probably require more detail about specific grants awarded and other resource development programs like annual campaigns, special events, relationships with individual donors, etc. Begin by discussing how your program would fit with other programs in the organization, and describe the funding sources for those existing programs. Discuss how (or whether) your program might be funded by existing sources, and identify strategies to acquire additional funds through those sources, and/or identify gaps that indicate the need for additional funding sources.

Part B: Identify potential funders for your program, including foundations and grants. Create a table that lists the funders, their funding priorities, applicant requirements (ie, do they fund nonprofits only, or will they fund for-profit and public agencies? Do they only fund a particular kind of service organization?), typical range of the award, application deadlines, application requirements (online application form?)

Require letter of interest before application?), and contact information (web address, contact person, email address, etc.).

Part C: Discuss options for other philanthropic fund-raising strategies. Does the organization already have an annual campaign? Do they have an annual event for donors? Do they hold fundraisers like charity auctions, a 5K, etc.? How effective are these efforts at generating the necessary revenue? Are there opportunities for new or additional events?

Part D: Discuss options for earned income strategies. Does the organization already have business ventures? How effective are these ventures at generating the necessary revenue? Are there opportunities for new or additional partnerships with business? Do (or would) earned income strategies support the mission of the organization, or do/would they contribute to mission drift?

Part E: Finally, summarize your findings from the sections above, and outline the strategies you would adopt to raise monetary and non-monetary resources needed for your program or project (i.e. individual or corporation donations, special events, grants, contracts). Create a table showing how all proposed efforts would cover the total cost in the budget from assignment #3. Identify the person(s) in the organization who would be most appropriate to pursue these efforts.

Products Due:

- Description of Current Funding Structure
- Table of Grant Sources
- Philanthropic Fund-Raising Strategies
- Earned Income Strategies
- Table of Proposed Fundraising Efforts

Grading Criteria	Points
Description of Current Funding Structure indicates understanding of the funding streams of the standing agency.	20
Table of Grant Sources is clear, easy to read, and contains all required elements.	20
Philanthropic Fund-Raising Strategies adequately discuss existing efforts and possibilities for new ones (or rationale for not pursuing Philanthropic Fund-Raising Strategies).	20
Earned Income Strategies adequately discuss existing efforts and possibilities for new ones (or rationale for not pursuing Philanthropic Fund-Raising Strategies).	20
Resource development strategy is justified; Table of Proposed Fundraising Efforts is clear, easy to read, and contains all required elements.	20
TOTAL	100

**Assignment #4 Final Presentation (20% of final grade)
To be completed in Class #7**

Students will present their program proposals in class before a visiting community practitioner who will provide feedback from the perspective of a potential funder. Quality expected of presentations in a professional setting.

Grading Criteria	Points
Student is well prepared for the presentation; thorough rehearsal is evidenced by smooth, convincing delivery. If used, visual aids provide support but do not distract or overpower.	35
The presentation demonstrates that the proposed program or intervention is necessary, well-reasoned, and has supporting evidence. Presentation is effective in convincing the audience of the need for funding.	35
Student behaves professionally and confidently. Dress, speech and body language are appropriate to the audience. Students maintain appropriate eye contact, speak clearly, and are easy to understand.	30

TOTAL	100
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**Assignment #5 Completed Program Plan (20% of final grade)
Due one week after the last day of class**

The purpose of this assignment is to compile the relevant products from the preceding assignments into a professional program proposal that can be presented to the host organization. Students will deliver the finished product to the host organization at the same time that they turn it in to the instructor. The host organization will complete a feedback form and will send the form to the instructor; this feedback will be available to students.

The final plan should look like an actual business plan, and should minimally include the following components. If the organization requires a specific format or needs additional information or data, be sure to negotiate that with them before turning in the final product.

1. Title Page (package the finished proposal in an attractive format that is appropriate to the organizational setting)

2. **(10 points)** Executive Summary

This will be a **short** (1page) **summary** of the program proposed, with brief supporting documentation, staff needed, and bottom line of the budget anticipated. It is expected that much of the statement in the Executive Summary will be repeated in the longer version.

3. **(10 points)** Issue Overview

Summarize the **need for the program**. Also **describe the standing agency** you have chosen for your program. Explain why the issue is important and how it fits with the organization chosen to address it. The issue should be compelling and supported by citations of research into its effect on a particular population. It must fit within the organization's existing mission.

4. **(10 points)** Logic Model and Outcome Objectives

These will come from your SOWO 570 Intervention Strategy (Logic Model & Theory of Change) assignment. Using the SMART criteria, list the short and long term outcomes you hope to achieve.

5. **(20 points)** Description of Program or Intervention

Describe your proposed services and/or activities in detail. If you are proposing a new direct service program, indicate and justify the practice model using theory and/or evidence, identify and describe the target population (needs, characteristics), outreach, screening, intake and assessment procedures, and the frequency, duration and intensity of services you will provide. If it is a systems or community intervention, describe how different organizations, businesses and/or associations will participate. Cite research to support effectiveness of the intervention. Sources are not limited to academic journals and can include government and foundation reports and individual program or community intervention evaluations. If a funder were reviewing this plan, it would be very clear what the agency (and its partners, if applicable) will do to achieve intended outcomes. Again, much of this will come from your SOWO 570 Intervention Strategy (Logic Model & Theory of Change) assignment.

What are the particular **strengths and limitations** of your plan? What actions will the organization need to take in order to leverage these strengths or overcome these limitations?

6. **(20 points)** Human Resources, Supervision and Management

Include all parts of the **Job Description, Hiring & Supervision Plan (Assignment #1)**. In addition, this section should answer the following questions: How many staff members will you need to hire to

implement this program or intervention? What job titles from the agency seem to fit for these staff? Who will supervise them? What supervision style is required for the new position(s)? Who will be responsible for overall management of the program or intervention, such as monitoring implementation, evaluating results, solving problems and monitoring the budget?

Job descriptions for the program should be included in the appendix.

7. **(20 points)** Financial Management

Include all parts of the **Full Cost Recovery Budget (Assignment #2)**. Also include a resource development plan that *outlines* the strategies you would adopt to raise monetary and non-monetary resources needed for your program or project (i.e. individual or corporation donations, special events, grants, contracts, etc.), including identified prospective funding sources.

Full, expected and reasonable costs of the program should be clearly identified in the budget. The budget should be well formatted and easy to read and understand. Major costs should be well explained and justified. The resource development plan should contain reasonable assumptions about how the organization can fund the program or intervention with specific and well-reasoned ideas for funding sources.

The Full Cost Recovery Budget, Table of Proposed Fundraising Efforts, and (if applicable) the Table of Grant Sources for the program should be included in the appendix.

8. Appendix

This should contain clean, edited copies of your job description(s), budget, and resource development plans. Points for these items are contained in other sections.

9. **(10 points)** References

At a minimum, **eight sources** are necessary for this assignment. Some sources may be the US Census or other surveys, but the majority of sources chosen must be from recognized scholarly journals and books (WIKIPEDIA is not a scholarly source). Texts from the course may be used but **DO NOT** count toward the eight source minimum requirement. You must follow APA format for citations. This section also grades the writing quality of the paper. Remember that you will be submitting your final product to an actual organization; think about the quality that they would expect of an employee or contractor.

Product Due:

- A finished (10-14 page) program proposal describing the type of program and activities necessary to reach desired outcomes for a specific population. Included in the plan will be staffing and supervision needs, a budget, and resource development plan.

Grading Criteria	Points
See outline above.	100
TOTAL	100