

**THE UNIVERSITY OF TENNESSEE
COLLEGE OF SOCIAL WORK**

SW-543 - Financial Management and Resource Development

Course Outline

Fall 2007

Social Work 543, Section 003
Tuesdays, 9:05 --12:05
Room: Henson 206
FAX: (865) 974-4803

Mary Rogge, Ph.D.

Phone: 974 - 7500 (w)

522 - 9325 (h)

email: mrogge@utk.edu

Room 225

Office hours: Monday: 1:00 – 3:00 p.m.

Tuesday: 1:00 – 3:00 p.m.

(others by appt.)

COURSE OUTLINE

1. Introduction: financial resource development and management; objectives and major themes; application of social work ethics, values, attention to diversity and vulnerable populations, and accountability
2. Internal and external environments of organizations (public, non-profit, profit)
3. Basics of financial resource development procurement and stewardship, in organizations, in context of ethics, diversity, and justice frameworks (elaborated in 4 - 9)
4. Fund-raising/development, marketing, and contracting
5. Contracts, grants, and program development
6. Financial control and accounting
7. Financial planning and budgeting
8. Computerized applications
9. Strategic program/business plan development, best practices

COURSE REQUIREMENTS AND EVALUATION PLAN

The class format will include primarily lectures by the instructor and guest lecturers and in-class exercises and participation. Participants are expected to read assigned readings in advance and be prepared to discuss them during weekly class sessions, attend all classes on time, participate constructively in class activity, and enjoy some of the learning at least some of the time.

Assigned readings may change occasionally to reflect current issues. Written materials are to be word-processed. Late papers will be marked down. Requests for exceptions must be discussed with the instructor at least a half day before the assignment is due. NO exceptions will be made for assignments that are late because of technological problems (e.g., printer or computer problems).

Assignments

Grant proposal (40%). The major assignment for the class will be the development and presentation of a grant proposal. If possible, students should base the grant proposal on existing needs of their field agencies or another social change or social service organization. (During the

semesters this course has been offered, at least 2 grant proposals developed through the course have been funded each semester).

The proposal will be developed over the semester, using the structure described in the Kiritz article. The assignment includes a search for appropriate potential funding sources for the proposal. Sections of the proposal will include a summary of the proposal, an introduction, a problem statement or needs assessment, objectives, methods, evaluation, plans for future funding, a budget with narrative, and other sections pertinent to the specific proposal of each student. The final product for this assignment will include a separate 3-4 page critical assessment of how your proposal and proposal writing process accounted for issues of diversity, at-risk populations (i.e., people of color; people who are poor; children; women; gay, lesbian, and transgendered persons; immigrants; elderly people; people with disabilities; people who are otherwise oppressed or discriminated against; other vulnerable groups), economic justice, and social work ethics.

The Grant Program Narrative is graded on a 100 pt scale and is worth 25% of the course grade. The Grant Budget is graded on a 100 pt scale and is worth 15% of the course grade. Grant Proposal grading points for the program narrative and budget are distributed as follows:

Program Narrative	Pts	Budget	Pts.
Summary	7	Summary	10
I. Introduction	7	Budget Detail	
		Comprehensiveness,	
		Accuracy, Organization	45
II. Problem/Needs	22	Formulas	35
III. Program Objectives	15	Budget Narrative	10
IV. Methods	15	Total	100
V. Evaluation	10		
VI. Future Funding	5		
Grammar/organization	8		
Time Line	2		
Supplementals	1		
Ethics/ Diversity/ Discrimination	8		
Assessment			
Total	100		

A word-processed, one page, double spaced prospectus outlining the grant is due at the beginning of Week 3, September 11. The prospectus is not graded. The prospectus should identify 1) the agency for which you are seeking funds; 2) the problem or need you intend to address; 3) the activities for which you are seeking funding; 4) an estimate of funds to be requested; 5) potential funder(s) for the grant if known; 6) whether the agency plans to submit the grant, and, if so, the time frame for submission; and 7) any particular factors that may hinder or streamline completing the grant proposal by December 8.

A draft of the proposal narrative is due at the beginning of class Week 8, October 16. The final grant proposal is due in the instructor's office by 5:00 p.m, Friday December 7.

In-Class Examination (25%). During *Week 5*, an in-class exam will be completed at the beginning of class. The exam will cover required readings and materials discussed through classes 1-4.

Budgeting Exercise (30%). Using scenarios with hypothetical agency program and financial information, students will use Microsoft Excel (Microsoft Office) spreadsheets to construct and modify a program budget. The *budgeting exercise is due at the beginning of class Week 12, November 13.*

Class participation (5%). Attendance, evidence of preparation of materials prior to class, and constructive discussion in class.

The final evaluation of each student's work will be based on the following weighting system:

In-class exam	25%
Budgeting exercise	30%
Grant proposal	
program narrative (Kiritz: summary and sections I - VI)	25%
budget, budget narrative, spreadsheet (Kiritz section VII)	15%
Class preparedness and participation:	5%

The grading scale used for the course is:

99 - 100.0	A+
94 - 98.0	A
90 - 93.9	B+
83 - 89.9	B
79 - 82.9	C+
73 - 78.9	C
67 - 72.9	D
< 67.9	F

TEXTS

Required:

Grobman, G.M. (2005). *The Nonprofit Handbook: Everything You Need to Know to Start and Run Your Nnprofit Organization*. 4th Ed. White Hat Communications, Harrisburg, PA.

Kiritz, N.J. (1980-2004). Program planning & proposal writing. Expanded version & evaluation checklist. Los Angeles: The Grantmanship Center, Los Angeles, CA, 90014.

Rapp, C.A. & Poertner, J. (1992). Social administration: A client-centered approach. New York, Longman.

Recommended:

Lauffer, A. (1997). Grants, etc. (2nd Ed.). Thousand Oaks, CA: Sage.

Other Assigned Course Readings are in Hodges Library Reserve as photocopies, texts, are online, or will be available to you through Blackboard.

Please also familiarize yourself with these University of Tennessee resources:

The University of Tennessee Libraries. (2007-2008). Reference Shelf – Style Manuals. Retrieved December 14, 2004 from <http://www.lib.utk.edu/refs/style.html> (for APA style).

The University of Tennessee Libraries. (2004). Understanding Plagiarism. Retrieved December 14, 2004 from <http://www.lib.utk.edu/instruction/plagiarism/students.html>

The University of Tennessee Libraries. (2004). Diversity Committee's Diversity Resource Guides. http://www.lib.utk.edu/diversity/resources/diversity_resource_guides.html

The University of Tennessee Department of English (2004). The Department of English Writing Center. Retrieved December 14, 2004 from <http://web.utk.edu/%7Eenglish/writing.php>

COURSE SCHEDULE

*Readings with an * are required and are to be read before you come to class. There will be additional or substituted handouts/documents on Blackboard and Internet-based readings for a number of class sessions.*

Week 1 Aug. 28 Syllabus and semester process review, objectives and major themes, application of social work ethics, values, attention to diversity, discrimination and oppression, justice, and accountability.

From vision to outcome: Social change and social service organizations in the 21st century
The nitty gritty of resource development, client-centered management, ethical and accountable financial practice in humane, responsive organizations
Scheduling, assignments, introduction to computer-based tools: spreadsheets, Internet resources.

*Handout: Independent Sector/Urban Inst. data: Not-for-profit/501(c)s in U.S./TN/Knox Co.

*Subscribe, before Week 2, to the Nonprofit Organizations, Voluntary Action and Philanthropy listserv (ARNOVA-L) at <http://www.arnova.org/listserv.php>

* Browse the Internet Nonprofit Center at <http://www.nonprofits.org/>

Week 2 Sept. 4 Internal and external environments of non-profit organizations (not-for-profit, public, and for-profit entities; social, community, and organizational trends; the role of social work macro practitioners in advancing individual worth and dignity through focus on mission, client-centered management, commitment to ethical conduct and life-long learning).

*Grobman, Quick Start Guide to forming a Nonprofit Organization, 23-24; Ch. 1 The Decision to Incorporate, 25-30; Ch. 2, Steps to Incorporation, 31-36; Ch. 3, Bylaws, 37-40; Ch. 9, Section 501(c) 3 Tax-Exempt Status; Ch. 32, Defining and Describing the Nonprofit Sector, 273-286; Ch 33 A Brief History of the Nonprofit Sector, 287-298; Ch. 34;

*Rapp & Poertner, Ch. 1, Client-Centered Management, 1-28.

*Handouts: Checklists on: Program Outcomes/Accountability, Fiscal Accountability, Forming a Not-for-profit Organization

Inglehart, and Becerra, R.M. (1995). Perspectives on the ethnic agency. In Inglehart and Becerra (1995). Social Services and the Ethnic Community. (pp. 165 - 203). Boston: Allyn and Bacon.

Galambos, C. (1999). Resolving ethical conflicts in a managed care environment. Health and Social Work, 24(3): 191-197.

Grobman, Ch. 34, Theory of the Nonprofit Sector, 299-308.

Gross et. al. (2000): Ch. 29, Principal federal tax forms filed (pp. 595-640); Ch. 30 State compliance requirements (pp. 641-654).

Jayarathne, S., Croxton, T., and Mattison, D. (1997). Social Work Professional Standards: An Exploratory Study. Social Work, 42(2): 187-199.

Kapur, K., & Weisbrod, B.A., (2000). The roles of government and nonprofit suppliers in mixed industries. Public Finance Review, 28(4), 275-308.

Ogles, B.M., Trout, S.C., Gillespie, D.K., & Penkert, K.S. (1998). Managed care as a platform for cross-system integration. Journal of Behavioral Health Services & Research, 25(3), 353-268.

Penner, R.G. (1998). A brief history of state and local fiscal policy. Series A, No. A-27, October, 1998. Washington, DC: Urban Institute. Available at: <http://www.urban.org>.

Weeks 3-4 Sept. 12, 19 Basics of organizational resource development, diversification, procurement and stewardship in the context of ethics, diversity, discrimination and oppression, and justice frameworks

*Grobman, Ch. 8, Nonprofit Organizational Ethics, 73-84; Ch. 29, Mergers and Consolidation, 253-257; Ch. 30, Quality Issues, 257-260; Ch. 31, Change Management, 261-272.

*Firstenberg, Part II: Remaking the Organization, pp. 49 - 76.

*Rapp & Poertner, Ch. 5, Resource Management, pp. 197-243 (*skip 218-230* until Week 10).

*Handout: Overview model of restructuring approaches: from dissolution to merger, with attention to discriminatory and oppressive practices, diversity, at-risk populations (see at-risk populations identified in grant proposal assignment), justice, and ethics, for program participants, agency staff, community.

*Rodgers & Tartaglia, (1990). Constricting resources: A black self-help perspective. Administration in Social Work, 14(2). 125-137.

*Reifler, B.V., Cox, N.J., Jones, B.N., Rushing, J., & Yates, K. (1999). Service use and financial performance in a replication program on adult day centers. American Journal of Geriatric Psychiatry, 7(2), 98-107.

Datta, S., & Varalakshmi, V. (1999). Decentralization: An effective method of financial management at the grassroots (evidence from India). Sustainable Development, 7(3), 113-120.

La Piana, D. (1998). Beyond collaboration: Strategic restructuring of nonprofit organizations. San Francisco, CA: James Irvine Foundation and National Center for Nonprofit Boards.

Reamer, F.G. (2000). The social work ethics audit: A risk-management strategy. Social Work, 45(4): 355-366.

Week 3: One page prospectus of grant proposal topic due

Week 4: Prospectus returned with comments

Week 5 Sept. 26 Fund-raising/development, marketing, and contracting; ethical practice; accounting for diversity, discrimination, oppression, and justice.

*Grobman, Ch. 15, Charitable Solicitation Registration, 131-134; Ch. 16, Fundraising, 135-142; Ch. 22, Fundraising on the Internet, 189-208; Ch. 23, Nonprofit E-Commerce, 209-220; Ch. 26, Nonprofits and Small Business Competition, 237-242; Ch. 27, State and Local Tax Exemptions, 243-246.

*Laufer (1997), Ch. 3 The Bucks Start Here, 39-69, Ch 4, Putting out a Contract, 70-94.

*Browse McNamara, C. (1999). Basic Guide to Nonprofit Program Design and Marketing. St. Paul, MN: The Management Assistance Program for Nonprofits. Available at: http://www.managementhelp.org/prog_mng/np_progs.htm

*Handout packet:

- Grantsmanship Center. (1999/2000). Grantmaker affinity groups: Where funders go to share (. Grantsmanship Center Magazine, 21- 26. [Focus is on addressing discriminatory practices, diversity, at-risk populations (see at risk-populations identified in grant proposal assignment), justice, and ethics]
- Better Business Bureau's Philanthropic Advisory Service (ethical complaints; standards for charitable contributions)
- A Donor Bill of Rights (Independent Sector)
- Kaeck, E.B. (Fall, 1996). It was not luck. National Society of Fund Raising Executives. (Booker T. Washington's fund-raising strategies for an historically African-American, under funded educational institution)

Barnett, J. & Hammond, S., (1999). Representing disability in charity promotions. Journal of Community and Applied Social Psychology, 9(4), 309-314.

Marx, J.D. (2000). Women and human service giving. Social Work, 45(1), 27-38.

Chaves, M. (1999). Congregations' Social Service Activities. Washington, DC: Urban Institute. Available at: [<http://www.urban.org>].

Cheung, C.K., & Chan, C.M. (2000). Social-cognitive factors of donating money to charity, with special attention to an international relief organization. Evaluation and Program Planning, 23(2), 241-253.

Johnston, J.M., & Romzek, B.S. (1999). Contracting and accountability in state Medicaid reform: Rhetoric, theories, and reality. Public Administrative Review, 59(5), 383-399.

Vinson, E. (1999). Performance Contracting in Six State Human Service Agencies. Governing-for-Results and Accountability Series, September, 1999. Washington, DC: Urban Institute. Available at: [<http://www.urban.org>]

Zahra, S.A., Ireland, R.D., Gutierrez, I., & Hitt, M.A. (2000). Privatization and entrepreneurial transformation: Emerging issues and a future research agenda. Academy of Management Review, 25(3), 509-524.

In-class exam over weeks 1-4 required readings, handouts, lectures

Week 6 Oct. 2 Grant proposal components. During weeks 6-8, we address client-centered/participatory program development; attending to client/staff/community diversity in program development; using intra and interorganizational team building and collaboration for program and proposal development; the role of grants in different organizational types (e.g., grassroots, bureaucratic); the program elements of a grant, including organizational, community and political needs assessment, with a focus on vulnerable and diverse populations; work on individual grant proposals, and initiate proposal review teams.

*Grobman, Ch. 5, Mission and Vision Statements, 49-54; Ch. 24, Forming and Running a Coalition, 221-226.

*Rapp & Poertner: Ch 2, Social Program Design; Ch 3, Managing Information, pp. 29-144.

*Kiritz: Program planning and proposal writing, Sections I - VI.

Exam returned

Week 7 Oct. 9 Grant proposal components (continued)

* Grobman, Ch. 17, Writing Effective Grant Proposals, 143-150.

*Handout: Rogge, M.E. (2004). Blueprint for Grant-Writing.

*Ch. 7, Four winners: Proposals that work. In Robinson, A. (1996). Grassroots grants: An activist's guide to proposal writing. Berkeley, CA: Chardon Press. (Critique and full text of proposals for 1) northwestern U.S. alliance-building, including women's projects, with Latino and Latina farm workers with Jewish communities; 2) inner city youth water issues education project, 3) southeastern, rural, coastal African-American community land-use planning; 4) Central Appalachian organizing and coalition-building for cultural and forest preservation.)

United Way of America. (1996). Measuring program outcomes: A practical approach. Alexandria, VA: United Way of America.

Week 8 Oct. 16 *FIELD TRIP!* Funding sources, computer-based grant searches.

*On-site orientation to Foundation Center materials, with Reference Librarian/Foundation Center Collection Manager Kathryn Moira at Lawson McGhee Library, 500 W. Church St. (*meet at Lawson McGhee Library 9:00 a.m.*)

*Review selected Internet sites:

<http://www.csw.utk.edu/swbookm2.htm> (Grant writing section)

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

<http://www.idealists.org>

*This trip to the local Foundation Center resource repository will include locating funding sources re: diversity, at-risk populations (i.e., people of color; people who are poor; children; women; gay, lesbian, and transgendered persons; immigrants; elderly people; people

with disabilities; people who are otherwise oppressed or discriminated against; other vulnerable groups), economic justice, and social work ethics.

draft of proposal (sections I - VI) due to instructor

Week 9-10 Oct. 23, Oct 30 Creating Proposal Budgets

(meet in computer lab, rm 226. We will work on the budget exercise in these two classes. It is very important that each student attend to complete the assignment.)

*Kiritz, Section VII, The Proposal Budget

*Review Microsoft Works spreadsheet help index in preparation for class.

Budgeting exercise handed out

Week 11 Nov. 6 Managing Funds: Budgeting

*Grobman, Ch. 11, Fiscal Issues, 99-104.

*Rapp & Poertner, Ch. 5, Resource Management, pp. 218 - 230.

*Handouts: Budget formats; budget ploys; Barrett, K., & Greene, R. (2000). The rise of cost accounting. *Governing*. March, 2000. Available at: <http://www.governing.com>

*Review the following websites on financial ethics:

Assoc. of Government Accountants Code of Ethics: http://www.agacgfm.org/cgfm/maintain/cgfm_code.aspx

Institute of Management Accountants Ethical Standards: <http://www.imanet.org/>

Arnold, V., Lampe, J.C., and Sutton, S.G. (1999). Understanding the Factors Underlying Ethical Organizations: Enabling Continuous Ethical Improvement. *Journal of Applied Business Research*, 15(3): 1-20.

Moyer, Liz. (2000). Financial Workers Report Widespread Breaches of Ethics. *American Banker*, 165(132): 2.

Plotnick, R.D., & Deppman, L. (1999). Using benefit-cost analysis to assess child abuse prevention and intervention programs. *Child Welfare*, 78(3), 381-407.

Rabeneck, L., Mencke, J., & Wray, N.P. (1999). How good are US studies of HIV costs of care? *Medical Care*, 37(8), 748-759.

Leadership Conference on Civil Rights and the Leadership Conference Education Fund. (2001). *From Digital Disconnect to Digital Empowerment*. Available at: http://www.civilrights.org/publications/digital_report/

Meier, R.L. (2000). Late-blooming societies can be stimulated by information technology. *Futures*, 32(2), 163-181.

Cohen, T. (2000). Donor Relationships nonprofit leaders wired for change. *The NonProfit Times*, August 1, 2000. Available at: <http://www.nptimes.com/index.html>

Draft proposal returned

Week 12 Nov. 13 Fiscal planning and management. Roles and responsibilities for ethical fiscal conduct; financial control and management; accounting concepts; internal and external audits and controls; scaling management to organizational size and complexity.

Guest Speaker: Rose Patrick, Chief Financial Officer, Catholic Charities of East Tennessee

*Gross et al. (2000). Key Financial Concepts, pp. 1-73; Financial Statement Presentation, pp. 211-236; Ch 21, The Importance of Budgeting, pp. 439-462, and Ch 22, Avoiding Bankruptcy, pp. 463-477.

*Kearns, K. (1994). The strategic management of accountability in nonprofits: An analytical framework. *Public Administration Review*, 54(2), 185-192.

*Review the Online Women's Business Center website: <http://www.onlinewbc.gov/>

*Handout: United Way of Minneapolis Area. (2000). Checklist to assess financial activities in nonprofit organizations. Available at: <http://www.mapnp.org/library/index.html>

Clifton, R.L. & Dahms, A.M. (1993). Grassroots Organizations, Appendix B, Financial management, pp. 181-210. Prospect Heights, IL: Waveland Press.

Gross et al. (2000). Ch. 31, Audits of Federally-Funded Programs, pp. 655-668; Part Six: Setting up and Keeping the Books, pp. 671-743.

Feit, M.D., & Li, P.K.W. (1998). Ch. 3, The fiscal subsystem, pp. 39-52, in Financial Management in Human Services.

Budgeting exercise due

Week 13 Nov. 20 Strategic program and business plan development

*Grobman, Ch. Ch. 6, Strategic Planning, 55-64.

*Klein, Section 5, Fundraising Management, pp. 273-304, and Section 7, Special Circumstances, pp. 323-339.

*Krug, K., Weinberg, C. (2004). Mission, money, and merit: Strategic decision making by nonprofit managers. *Nonprofit Management and Leadership*, 14(4), 325-342.

*Handout: Financial strategic planning data/reports

Bangs, D.H. (1995). The Business Planning Guide. 7th Ed. Chicago, IL: Upstart Publishing.

Budgeting exercise returned

Week 14-15 Nov. 27, Dec. 5. Final key concepts, integration and summing up

*Grobman, Ch. 4, Nonprofit Boards of Directors, 41-48; Ch. 7, Transforming Models for Nonprofit Board Leadership, 65-72; Ch. 10 Liability, Risk Management, and Insurance; Ch. 18, Lobbying, 151-158; Ch. 19, Political Activity by Nonprofits, 159-164; Ch. 20, Communications and Public Relations, 165-173; Ch. 35, The Future of the Nonprofit Sector, 309-324.

*Browse BoardSource: <http://www.boardsource.org/>

Final class session on Dec. 5 may include a practitioner panel on best practices in fund development and resource management.

In-class review and discussion of grant proposals

The final grant proposal is due in the instructor's office by 5:00 p.m, Friday December 7.

Internet Links

For Internet links to resources regarding not-for-profit, for-profit, and public sector management, and for grant writing, fund raising and other resource development links, see the UT College of Social Work Home Page Resource Links at: <http://www.csw.utk.edu/swbookm2.htm>

A Short Sampling of Journals Related to Financial Management

Administration in Mental Health	Management in Practice
Administration in Social Work	Management Research
Administrative Management	Management Review and Digest
Administrative Science Quarterly	Management Strategy
Black Business Digest	Management Today
Black Enterprises	Management World
Business and Society	Managerial Planning
Business Quarterly, The	Nonprofit Management and Leadership
Foundation News	NonProfit Times
Fundraising Management	Nonprofit and Voluntary Sector
Governing	Quarterly
Grantsmanship Center News, The	Omega
Harvard Business Review	Public Administration Review
Journal of Community Practice	Public Finance Review
Journal of Health Care Finance	Public Welfare

BIBLIOGRAPHY

- Anonymous. (1999). Standards of ethical conduct for practitioners of management accounting and financial management. Strategic Finance Magazine, 80(10), 72.
- Bangs, D.H., Jr. (1995). The business planning guide: Creating a plan for success in your own business. (7th ed.). Chicago: IL: Upstart Publishing.
- Bartels, S.J., & Colenda, C.C. (1998). Mental health services for Alzheimer's disease-Current trends in reimbursement and public policy, and the future under managed care. American Journal of Geriatric Psychiatry, 6(2), S85-S100.
- Barrett, R. D. & Ware, M. E. (1997). Planned giving: A step by step guide to success. Maryland: Aspen.
- Bendick, M. & Egan, M.L. (1995). Worker ownership and participation enhances economic development in low-opportunity communities. Journal of Community Practice, 2 (1). 61 - 86.
- Bises, B. (2000). Exemption or taxation for profits of non-profits? An answer from a model incorporating managerial discretion. Public Finance Quarterly, 104(1-2), 19-39.
- Blank, R.M. (2000). When can public policy makers rely on private markets? The effective provision of social services. Economic Journal, 110(462), C34-C49.
- Chang, C.F., & Tuckman, H.P. (1996). The goods produced by nonprofit organizations. Public Choice, 24(1) 25-43.
- Darnell, R.C. (1995). Annual report on charitable fund raising. State of Tennessee, Office of the Secretary of State.
- Edwards, R.L., Benefield, E.A., Edwards, J.A. & Yankey, J.A. (1997). Building a strong foundation: Fundraising for nonprofits. Washington, DC: National Association of Social Workers.
- Fedor, F.P. (2000). Cost-effective compliance for the small provider. Healthcare Financial Management, 54(7), 56-60.
- Froelich, H.A., & Knoepfle, T.W. (1996). Internal Revenue Service 990 data: Fact or fiction? Nonprofit and Voluntary Sector Quarterly, 25(1), 40-52.
- Garner, J. E. (1990). Disaggregation is the key to successful cost reduction. Financial Managers' Statement, (12)3, 6-7, 45.
- Gantz, M. (1999). Who do you trust? Comparing data on skilled-nursing facilities from the internal revenue service and health care financing administration. Nonprofit and Voluntary Sector Quarterly, 28(4), 476-490.

- Giacobbe, R.W., & Segal, M.N. (2000). A comparative analysis of ethical perceptions in marketing research: USA vs. Canada. Journal of Business Ethics, 27(3), 229-245.
- Goldschmidt, Y. & Amiram, G. (1990). A managerial approach to allocating indirect fixed costs in health care organizations. Health Care Management Review, 15(2), 43-51.
- Goodeeris, J.H., & Weisbrod, B.A. (1998). Conversion from nonprofit to for-profit legal status: Why does it happen and should anyone care. Journal of Policy Analysis and Management, 17(2), 215-233.
- Gronbjerg, K.A., Chen, T.H., & Stagner, M.W. (1995). Child welfare contracting: market forces and leverage. Social Service Review, 69(4), 583-613.
- Gruen, T.W., Summers, J.O, & Acito, F. (2000). Relationship marketing activities, commitment, and membership behaviors in professional associations. Journal of Marketing, 64(3), 34-49.
- Hansmann, H. (2000). Nonprofit organization in perspective. Nonprofit and Voluntary Sector Quarterly, 29(1), 179-184.
- Hirth, R.A. (2000). Consumer information and competition between nonprofit and for-profit nursing homes. Journal of Health Economic, 18(2), 219-240.
- Hodgkin, D, Horgan, C.M., & Garnick, D.W. (1997). Make or buy: HMOs' contracting arrangements for mental health care. Administration and Policy in Mental Health 24(4), 359-370.
- Johnson, M.P, & Hurter, A.P (1999). Economic impact of subsidized housing relocation. Papers In Regional Science, 78(3), 265-295.
- Kelly, K.S. (1998). Effective fund-raising management. New Jersey: Lawrence Erlbaum Associates.
- Kettner, P.M. & Martin, L.L. (1996). The impact of declining resources and purchase of service contracting on private, nonprofit agencies. Administration in Social Work, 20(3), 21-38.
- Kettner, P.M, & Martin, L.L. (1995). Performance contracting in the human services: An initial assessment. Administration in Social Work, 19(2), 47-61.
- Khan, Z.A., Thornton, N., & Frazier, M. (2000). Experience of a financial reforms project in Bangladesh. Public Administration and Development, 20(1), 33-42.
- Kirby, S.L., & Richard, O.C. (2000). Impact of marketing work-place diversity on employee job involvement and organizational commitment. Journal of Social Psychology, 140(3), 367-377.
- Kirwin, P.M., and Kaye, L.W. (1993). A comparative cost analysis of alternative models of adult day care. Administration in Social Work, 17(2), 105-122.

- Klein, K. (1996). Fundraising for social change. (3rd ed.). Berkeley, CA: Chardon Press.
- Kotler, P. & Andreasen, A. (1996). Strategic marketing for nonprofit organizations. (5th ed.). Englewood Cliffs, NJ: Prentice Hall, Inc.
- Kramer, R. M. (1994). Voluntary agencies and the contract culture: Dream or nightmare? Social Service Review, 68(1), 33-60.
- Levy, B. R. & Marion, B. H. (1997). Successful special events: Planning, hosting, and evaluating. Aspen Publishers, Inc.
- Lieberman, A.A. & Turner, W.M. (1991). Assessing the effect of vendoring on fee setting for social workers: An empirical test. Social Work Research & Abstracts, 27(1), 28-33.
- Lovelock, C. & Weinberg, C. Public & nonprofit marketing: Cases and readings. (2nd ed.). Redwood City, CA: Scientific Press.
- Maister, D. H. (1993). Managing the professional service firm. New York: Free Press.
- Malhotra, N.K., Peterson, M., & Kleiser, S.B. (1999). Marketing research: A state-of-the-art review and directions for the twenty-first century. Journal of the Academy of Marketing Science, 27(2), 160-183.
- Martin, L. L. & Kettner, P. M. (1996). Measuring the performance of human service programs. Thousand Oaks, CA: SAGE Publications, Inc.
- Marx, J.D. (1997). Corporate strategic philanthropy: Implications for social work. Social Work, 43(1), 35-41.
- Moller-Tiger, D. (1999). Long-range strategic planning: A case study. Healthcare Financial Management, 53(5), 33-35.
- Nilson, T. H. (1992). Value-added marketing. New York: McGraw Hill.
- Powell, J. (1999). Contract management and community care: A negotiated process. British Journal of Social Work, 29(6), 861-875.
- Ponto, J.M., & Berg, W. (1992). Social work services in the emergency department: A cost-benefit analysis of an extended coverage program. Health in Social Work 17(1), 66-73.
- Ray, G.T, Lieu, T., Weinick, R.M., Cohen, J.W., Fireman, B., & Newacheck, P. (2000). Comparing the medical expenses of children with medicaid and commercial insurance in an HMO. American Journal of Managed Care, 6(7), 753-760.
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**SW 543 Financial Management and Resource Development
Fall, 2007
Course Timeline**

	Aug. 28 #1	Sep 4 #2	Sep 11 #3	Sep 18 #4	Sep 25 #5	Oct 2 #6	Oct 9 #7	Oct 16 #8	Oct 23 #9	Oct 30 #10	Nv 6 #11	Nv 13 #12	Nv 20 #13	Nv 27 #14	Dec 4 #15
Content	Resource base components and alternatives: govt/ for-profit/ nonprofit, fundraising, contracting, fee-for-service					Grant narrative development		Funding source searches (FIELD TRIP)	Fiscal management: Program-budget fit, accounting, budgeting, spreadsheet applications				Strategic & business plans	Key concepts wrap-up	
Assignments received				Prospectus returned		Exam returned			Budget exercise received			Draft narrative returned	Budget exercise returned		
Assignments due			One page prospectus due		In-class exam			Draft proposal narrative due				Budget exercise due			Final Proposal due by Friday 5 pm Dec 7