

UNIVERSITY OF TENNESSEE

COLLEGE OF SOCIAL WORK

SW 543 Financial Management and Resource Development

(3 credit hours)

Fall 2008

Social Work 543, Section 001
Tuesdays, 9:05 --12:05
Room: Henson 306
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Office hours: Monday: 1:00 – 3:00 p.m.
Tuesday: 1:00 – 3:00 p.m.
(others by appt.)

Prerequisite(s): 510, 512, 513, 517, 519, 520, 522, 537, 538, 539.

Required Texts

Grobman, G.M. (2005). *The Nonprofit Handbook: Everything You Need to Know to Start and Run Your Nnprofit Organization*. 5th Ed. White Hat Communications, Harrisburg, PA.

Kiritz, N.J. (1980-2007). Program planning & proposal writing. Expanded version & evaluation checklist. Los Angeles: The Grantmanship Center, Los Angeles, CA, 90014.

COURSE REQUIREMENTS AND EVALUATION PLAN

Additional Readings and Resources

Other **required** course readings are listed in the syllabus and are available on-line through the UTK Hodges Library Course Reserves site.

Additional reading materials may be distributed during class sessions. Some required readings may be changed over the course of the semester.

Please also familiarize yourself with these University of Tennessee resources:

The University of Tennessee Libraries. (2008). Reference Shelf – Style Manuals. Retrieved August 6, 2008 from <http://www.lib.utk.edu/refs/style.html> (for APA style).

The University of Tennessee Libraries. (2008). Understanding Plagiarism. Retrieved August 6, 2008 from <http://www.lib.utk.edu/instruction/plagiarism/students.html>

The University of Tennessee Libraries. (2008). Diversity Committee's Diversity Resource Guides. Retrieved August 6, 2008 from http://www.lib.utk.edu/diversity/resources/diversity_resource_guides.html

Course Requirements

Graduate level work includes an ability to synthesize one's experience and knowledge into an explanation that illuminates theory and an understanding of the course material. The writing of papers is expected to be organized, succinct in conceptualization and syntax and grammatically correct. Even if you use a word processing program with spell check, proof read your work. The use of the Publication Manual of the American Psychological Association (5th ed.) format including the use of headings/subheadings, reference list, and title page is expected to be used as a guide for writing and citing sources. The following criteria will be used for all graded assignments:

- Quality and clarity of writing and organization;
- Comprehensiveness;
- The extent to which course concepts, discussion and readings are reflected in the writing; and
- Submission of assignments on the dates specified within the guidelines provided.

1. Assigned Readings, Activities, and Attendance

Students are expected to complete all readings assigned by the instructor before attending class; participate in all on-line and in class discussions; and demonstrate respect for all beliefs and experiences of others in all course activities and interactions with fellow students. Students are also encouraged as they read and as they work in the field to bring their reactions and questions to class for discussion. The format for activities carried out in class or via Blackboard will be related to course readings, lectures, small group exercises, and other venues.

Regular attendance is essential. Students are expected to be on time, attend all class sessions, and stay until the completion of class sessions. In the case of a medical or personal emergency, students should make reasonable effort to contact the instructor in advance via e-mail or voice mail. Students will only be excused for documented emergencies. Unexcused absences from the course and chronic lateness will result in reduction of the final grade by one grade level.

All class assignments are expected to be submitted on their specific due date. Any assignment **NOT submitted** on the specified due date is subject to a **penalty of two (2) points per day** until the assignment is turned in. **Any assignment that is more than 7 days overdue will not be accepted.**

Assignments

Grant proposal (40%). The major assignment for the class will be the development and presentation of a grant proposal. Students should base the grant proposal on existing needs of their field agencies or another social change or social service organization. If this is not feasible, the student should contact the instructor immediately so that the student can be linked to a field organization. (During the semesters this course has been offered, at least 2 grant proposals

developed through the course have been funded each semester). Creating a feasible and well-scaled program, and accurately assigning realistic costs for carrying out the program, requires an evidence-based understanding of the organization's mission, goals, and objectives and an evidence-based assessment of the organization and target population/community's needs. This major course assignment requires that each student demonstrate, therefore, the application of this core course competency, of evidence-based evaluation skills with regard to evaluating financial decision-making processes in the organizational and community setting used with regard to this grant proposal.

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 must 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. Include in this critical assessment a discussion of the relationships among resource development and issues of diversity, economic justice, and issues with regard to tolerating ambiguity in resolving ethical conflicts.

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 10% 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
	22	Formulas	35
II. Problem/Needs			
III. Program Objectives	15	Budget Narrative	10
IV. Methods	15		100
		Total	
V. Evaluation	10		
VI. Future Funding	5		
Grammar/organization	8		
Time Line	2		
Supplementals	1		
Ethics/ Diversity/ Discrimination	8		
Assessment			
	100		
Total			

A word-processed, one page, double spaced prospectus outlining the grant is due at the beginning of Week 3, September 9. 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 4.

*You **may** choose to submit a DRAFT of the proposal narrative for instructor feedback at the beginning of class Week 9, October 21. It is to your advantage to do so; this is the only point in the semester at which you may submit a written draft for a thorough critique and written, ungraded feedback.*

The final grant proposal is due in the instructor's office by noon Thursday December 4.

In-Class Examination (30%). During *Week 6*, Sept. 30, an in-class exam will be completed during the first half of class. The exam will cover required readings and materials discussed in classes 1-5. Content covered in the exam will include but not be limited to the following topics: 1) changing internal and external environments of governments and social welfare organizations; 2) social and economic trends such as globalization that produce challenges for social welfare organizations' fiscal resource procurement efforts; 3) principles, issues, challenges, and conflict with regard to ethical financial resource procurement and stewardship in social welfare organizations; 4) traditional methods of diversifying and managing funding in public/private, not-for-profit and for-profit organizations, and in communities; and 5) social marketing, social entrepreneurial, micro-enterprise, and asset building programs as fiscal resource opportunities for client/system empowerment.

Budgeting Exercise (25%). 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 multi-page spreadsheet basic budget category, line item, and formulary structure created for the exercise will be used as a budget "template" for the final grant assignment budget. Students will receive the budget exercise on October 21. We will work in the Henson Hall computer lab on the budget exercise on October 28 and Nov. 4. The *budget exercise is due to the instructor by Friday Nov. 7, at 5:00 p.m.*

Class participation (10%). Attendance, evidence of preparation of materials prior to class, and constructive discussion and participation in class.

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

In-class exam	30%
Budgeting exercise	25%
Grant proposal	
program narrative (Kiritz: summary and sections I - VI)	25%
budget, budget narrative, spreadsheet (Kiritz section VII)	10%
Class preparedness and participation:	10%

Grading Scale

The following grading scale will be used for final course grade.

- | | |
|--------------|--|
| A (95-100) | Outstanding/Superior – Exceptional performance. Consistently exceeds expectations. |
| B+ (90-94) | Very Good – Student consistently meets and occasionally exceeds normal expectations for the course. |
| B (85-89) | Good – Student consistently meets normal expectations for the course. |
| C+ (80-84) | Average – There is unevenness in grasping course content. Student is inconsistent in meeting the normal expectations for the course. |
| C (70-79) | Poor - There is a lack of understanding of course content. Student does not meet course expectations. |
| F (69-Below) | Very Poor – There is a lack of attendance or incomplete assignments. Course expectations are not met. |

COURSE SCHEDULE

*Readings with an * are required and are to be read before you come to class. There may be additional or substituted document, which will be posted on Blackboard, for some class sessions.*

Week 1 Aug. 26 Intro to core evidence-based financial resource concepts, competencies.

Review of syllabus, discussion of assignments, in-class activities, and library resources and reserve information. Processes for translating organizational mission to program outcomes; documenting and tracking social and economic trends and resource challenges affecting client/client systems, social welfare organizations, and the “independent sector”, including globalization; linking in to critical thinkers’ networks.

*Independent Sector/Urban Inst. data: Not-for-profit/501(c)s in U.S./TN/Knox Co. and international (*Retrieve from Blackboard under Course Materials and bring to class*).

**Subscribe, before Week 2, to the Nonprofit Organizations, Voluntary Action and Philanthropy listserv (ARNOVA-L) at <http://www.arnova.org/listserv.php> (you will track and we will discuss in class various threads from this active listserv over the course of the semester)*

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

Week 2 Sept. 2 Internal and external environments of social welfare organizations

(Public, non-profit, profit). We examine legal criteria and research data on the organizational dimensions and dynamics of the “independent sector”. We discuss international NGOs but focus on not-for-profit (aka non-profit) social welfare organizations in the US. Ethical principles and issues emerge as we explore differences and similarities between not-for-profit and for-profit corporations, social welfare organizations’ components and special responsibility to client/client systems and the public as stakeholders.

- *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; 83-90; Ch 26, Nonprofits and Small Business Competition, 271-276; Ch. 33, Defining and Describing the Nonprofit Sector, 315-330; Ch 33, A Brief History of the Nonprofit Sector, 331-342.
- *Rapp & Poertner (1992), Ch. 1, Client-Centered Management, 1-28.
- *Checklists on: Program Outcomes/Accountability, Fiscal Accountability, Forming a Not-for-profit Organization (*Retrieve from Blackboard under Course Materials and bring to class*).

Grobman, Ch. 35, Theory of the Nonprofit Sector, 343-350.

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

Week 3 Sept. 9 Financial Resource Procurement & Stewardship: Traditional Resources

We discuss diversifying organizational financial resources through major traditional options of fund-raising/development, government appropriations, contracts, grants, and fees-for-service. We explore concepts related to organizational restructuring. Consider and bring your thoughts to class as you examine readings and internet materials: What implications exist with regard to traditional fiscal resources development and diversity, justice, discrimination, ethics?

- *Grobman, Ch. 15, Charitable Solicitation Registration, 141-144; Ch. 16, Fundraising, 145-156; Ch. 29, Mergers and Consolidation, 287-290; Ch. 30, Quality Issues, 291-294; Ch. 31, Change Management, 295-304.
- *Lauffer (1997), Ch. 3 The Bucks Start Here, 39-69, Ch 4, Putting out a Contract, 70-94.
- *Rapp & Poertner (1992), Ch. 5, Resource Management, pp. 197-243 (*skip 218-230*).
- *Overview model of organizational 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. (*You will be able to retrieve this from Blackboard under Course Materials after class is over this day*).

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 Sept. 16 Financial Resource Procurement & Stewardship: Emerging Resources

We will define and explore a range of social marketing, and social entrepreneurship opportunities to empower individuals, communities and organizations in a local to global context. First, we'll discuss creative and expanding uses of familiar resource development methods, such as fundraising, through new technological venues. Then, we'll define and explore social entrepreneurship, micro-enterprise, and asset building as three major approaches that have emerged to improve the fiscal wellbeing of often least-well economically resourced individuals, families, and communities across the world. Consider and bring your thoughts to class as you examine readings and internet materials: What implications exist with regard to emerging fiscal resources development and diversity, justice, discrimination, ethics?

*Grobman, Ch. 22, Fundraising on the Internet, 209-236; Ch. 23, Nonprofit E-Commerce, 237-254.

*Martin, R.L., & Osberg, S. (Spring, 2007). Social entrepreneurship: The case for definition. *Stanford Social Innovations Review*, 27-39. Retrieved August 15, 2008 from www.ssireview.org

*Ashoka International webpage, retrieved August 8, 2008 at <http://www.ashoka.org/>

*Social Enterprise (Social Entrepreneurship), retrieved August 8, 2008 at http://www.managementhelp.org/soc_entr/soc_entr.htm

*Center for Social Development website, at http://gwbweb.wustl.edu/csd/about/about_new.htm, (review site links re: asset building, civic service, GAP, SEED).

*Edgcomb, E.L., & Klein, J.A. (2005). *Opening Opportunities, Building Ownership: Fulfilling the Promise of Microenterprise in the United States*. USA: FIELD (The Microenterprise Fund for Innovation, Effectiveness, Learning and Dissemination) program of the Aspen Institute.

*USAID Microenterprise Development: How We Work with Our Partners: Retrieved August 15, 2008 from http://www.usaid.gov/our_work/economic_growth_and_trade/micro/how_we_work.htm

Week 4: Prospectus returned with comments

Week 5 Sept. 23 Continuing the discussion of traditional and emerging fiscal development methods, we will discuss marketing processes. Then, we will critique these methods in the context of ethical, diversity, and justice issues, dilemmas, and frameworks.

*Grobman, Ch. 8, Nonprofit Organizational Ethics, 71-82.

*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

*Packet (*Retrieve from Blackboard under Course Materials and bring to class*):

- 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)

*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.

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

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.

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

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.

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

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

Week 6 Sept 30 In Class Examination (30%) see description on syllabus p 5.

Weeks 7, 8 Oct. 7, 14 Grant Proposal Components. During these two weeks, we address how to translate client/system needs and organizational vision to program outcomes through conceptualizing and writing an actual grant proposal. Skills addressed in these sessions include developing a program, attaching a realistic budget, using client-centered/participatory planning processes; attending to client/staff/community diversity; building intra and interorganizational team collaboration, and learning about program elements of a grant. While having all of this fun, we maintain a focus on the most vulnerable and diverse client/systems served by the organization. And, we review a "blueprint" checklist tool for attending to the nitty gritty details of successful grant writing.

*Grobman, Ch. 5, Mission and Vision Statements, 49-52; Ch. 17, Writing Effective Grant Proposals, 157-164; Ch. 32, Organization and Program Evaluation, pp. 305-312.

*Rapp & Poertner (1992): Ch 2, Social Program Design; Ch 3, Managing Information, pp. 29-144.

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

*Rogge, M.E. (2006): Program Design – Vision-to-Measuring-Outcomes Blueprint (*Retrieve from Blackboard under Course Materials and bring to class*).

*Rogge, M.E. (2008). *Blueprint for Grant-Writing. (Retrieve from Blackboard under Course Materials and bring to class).*

Exam returned on Oct. 7.

Week 9 Oct. 21

FIELD TRIP! Lawson McGhee Library 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.)

This trip to the local Foundation Center resource repository will include a comprehensive orientation to using the Foundation Center resource repository, and to other technology- and library-based grant and funding resources. Included will be options for 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.

*Review selected Internet sites (*Retrieve from Blackboard under Course Materials and browse before class*)

Optional: DRAFT grant proposal narrative handed in for critique

Budgeting exercise handed out

Weeks 10, 11 Oct. 28, Nov. 4 Computer-based Technology to Design, Evaluate and Manage Organizational Finances

(Meet in computer lab, Henson Hall 226.

We will review a range of current and emerging computer-based technological uses with regard to organizational finances in not-for-profit, for-profit, and government social welfare organizations. Then, we will use the budget exercise to develop knowledge and skill in in these two classes. It is very important that each student attend these class sessions to complete the assignment.)

*Kiritz, Section VII, The Proposal Budget

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

Draft grant proposal returned by start of class Oct. 28

Budget Exercise due by Friday Nov. 7 5:00 p.m.

Weeks 12, 13 Nov. 11, 18 Financial Resource Procurement, Stewardship, and Decision-Making Processes. Roles and responsibilities for ethical fiscal conduct; financial control and management; accounting and budgeting concepts and processes; internal and external audits and controls; scaling management to organizational size and complexity; linking program and fiscal strategic planning processes.

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

(We may have more than one guest speaker during this two week period)

*Grobman, Ch. 10 Liability, Risk Management, and Insurance, 91-96; Ch. 11, Fiscal Issues, 97-114; Ch. 27, State and Local Tax Exemptions, 277-280.

*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.

*Financial planning data/reports. *(Retrieve from Blackboard under Course Materials and bring to class).*

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

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

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.

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>

Week 14 Nov. 25 Grant Writing Proposal Update and Review Review Session After completing course evaluations, each student will brief the class on his/her grant proposal and we'll use the session to address issues and questions specific to the completion of the grant proposal assignment.

Week 15 Dec. 2. Board Development and Leadership, Strategic Planning. For our final set of readings, we target aspects of leadership development, which has critical implications for so many of the course core competencies, including ethical procurement, management, and evaluation of fiscal resources; diversifying traditional and emerging resource options; enacting a local-to-global vision that is client-centered, diversity-promoting, and empowering for those who are least socially and economically resourced.

(We may have practitioners join us to speak on this week's topics this session)

*Grobman, Ch. 4, Nonprofit Boards of Directors, 41-48; Ch. 6, Strategic Planning, 53-70; Ch. 7, Transforming Models for Nonprofit Board Leadership, 63-70; Ch. 18, Lobbying, 165-172; Ch. 19, Political Activity by Nonprofits, 173-178; Ch. 20, Communications and Public Relations, 179-186; Ch. 35, The Future of the Nonprofit Sector, 351-370.

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

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

The final grant proposal is due in the instructor's office by 5 p.m. Thursday December 4.

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 Quarterly
Governing	Omega
Grantsmanship Center News, The	Public Administration Review
Harvard Business Review	Public Finance Review
Journal of Community Practice	Public Welfare
Journal of Health Care Finance	Social Research
Journal of Philanthropy, The	Social Science Quarterly
Management Accounting	Social Science Research

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.
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COURSE OUTLINE

- 1.
2. Internal and external environments of social welfare organizations (public, non-profit, profit) designed to promote the wellbeing of individuals, families, groups, client/systems, particularly those in disenfranchised sectors of the economy.
3. Critical assessments and applications of ethical, diversity, and justice frameworks with regard to financial resources in organizations
4. **Traditional and emerging methods and options for selecting and diversifying organizational financial resource procurement and stewardship** (from fund-raising/development, government appropriations, contracting, grants writing, fees-for-service to social entrepreneurship, micro-enterprise, and asset building).
5. Emerging methods and options for selecting and diversifying organizational financial resource procurement and stewardship, including social entrepreneurship, micro-enterprise, and asset building.
6. Application of evidence-based evaluation knowledge and skills to guide and evaluation financial decision making processes: financial control and accounting; planning and budgeting
7. Application of organizational financial resource procurement and management skills with organizational mission, goals, and program development skills: grantwriting.
8. Using computer-based technology for financial resources and service systems management.
9. Strategic program/business plan development, best practices