

SOCW 6363-001: Budgeting and Financial Management Spring 2014

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Faculty Profile:

Class meets: on-line

Office Hours: By appointment only

## **EPAS STATEMENT**

### 4.5 Social Work Practice

Social work practice content is anchored in the purposes of the social work profession and focuses on strengths, capacities, and resources of client systems in relation to their broader environments. Students learn practice content that encompasses knowledge and skills to work with individuals, families, groups, organizations, and communities. This content includes engaging clients in an appropriate working relationship, identifying issues, problems, needs, resources, and assets; collecting and assessing information; and planning for service delivery. It includes using communication skills, supervision, and consultation. Practice content also includes identifying, analyzing, and implementing empirically based interventions designed to achieve client goals; applying empirical knowledge and technological advances; evaluating program outcomes and practice effectiveness; developing, analyzing, advocating, and providing leadership for policies and services; and promoting social and economic justice.

## **DESCRIPTION OF COURSE CONTENT**

### *From the Graduate Catalog*

Basic overview of financial management applied specifically to human service agencies; emphasizes on basic concepts and skill building in budgeting and fund raising; accounting principles, financial statements, and computerized financial information systems also covered. Prerequisite: SOCW 6371 or concurrent enrollment.

### *Additional Description*

This course examines the procedures and skills essential for the procurement, allocation and management of fiscal resources in human service organizations. Understanding these matters are important for operating in an organizational context, even if students do not intend to move directly into staff positions concerned with fiscal matters. We will look at many different ways of fundraising except that we will not cover material on grantwriting, which has been introduced in other CAP courses and has a complete CAP elective devoted to it.

## **STUDENT LEARNING OUTCOMES AND EDUCATIONAL OBJECTIVES**

**SOCW 6363 addresses the following MSSW CAP educational objectives (numbers refer to Concentration Objectives):**

- i. By graduation, students specializing in Community and Administrative Practice will achieve the foundation objectives and the following advanced concentration objectives:**
  - a. (1) Build on generalist skills in community assessment to design an intervention strategy Including mission, goals, objectives, budget, logic model, and evaluation.

- b. (2) Identify, critically evaluate, and apply appropriate, evidence-informed intervention at the agency or community level.
- c. (4) Demonstrate skills in ethical and empowerment-based social work practice, taking into account the impact of race, gender, sexual orientation, ability, culture, religion, national origin and other client characteristics in organizations, and communities.
- d. (5) Design practice evaluation activities to improve human service interventions in organizations and communities.
- e. (7) Prepare to engage in life-long learning and activities to update and improve professional knowledge and skills.

**This course relates to and advances the program objectives by requiring students to demonstrate advanced skill in budgeting, financial management, and the application of an analytical framework to understand an organization's current and possible future budgetary and financial situation.**

### **COURSE OBJECTIVES**

By the end of the course, students will:

1. Define the role of budgeting as it relates to program mission, goals, objectives and evaluation;
2. Develop understandings of the varieties and sources of revenues and the means for procuring funds for program support;
3. Acquire knowledge and competence in basic budgeting;
4. Describe management procedures used in the control of and accountability for fiscal resources;
5. Analyze linkages of fiscal procedures with other areas of agency practice and administration;
6. Demonstrate skills in ethical and empowerment-based social work practice, taking into account the impact of race, gender, sexual orientation, ability, culture, religion, national origin and other client characteristics in budgeting in organizations and communities.

### **LIBERAL ARTS FOUNDATION FOR THE COURSE**

This course builds upon the liberal arts foundation of a bachelor's degree in any field, including social work. Students are assumed to have a working knowledge of the American human services sector. Students are also expected to be competent (written and oral) communicators in English. Basic computer skills in word processing are assumed. This course also builds upon a liberal arts undergraduate degree by expecting basic competency in math and critical thinking.

### **HOW THIS COURSE BUILDS UPON THE FOUNDATION SOCIAL WORK MASTERS CURRICULUM**

This course is part of the Community and Administrative Practice sequence. It builds on material you have learned in the Foundation CAP courses. At the same time, important knowledge and skills from direct practice, research and human behavior courses are also used.

This course assumes knowledge of social policy history, and the mission and philosophy of the social work profession, including the past and current extent of individual and collective social justice and institutionalized forms of oppression. Students are also expected to be familiar with social work values and ethics as well as the importance of social policy for proper social work practice.

This course also builds upon the skills of listening, reflecting and other “direct practice” skills that are necessary when understanding views that may differ from one’s own. Knowledge of human behavior, including information on race, ethnicity and gender, is very useful when planning fundraising efforts. Research skills are vital in understanding what is happening and what can be done to improve the situations that need to be changed.

While it may not be obvious, a course on budgeting is a course on applied values. At least two sections of the NASW Code of Ethics have particular relevance to this course. Section 3.07(a) indicates that “Social work administrators should advocate within and outside their agencies for adequate resources to meet clients’ needs.” Section 3.07(b) states: “Social workers should advocate for resource allocation procedures that are open and fair. When not all clients’ needs can be met, an allocation procedure should be developed that is nondiscriminatory and based on appropriate and consistently applied principles.”

The expression, “Put your money where your mouth is” applies to a great extent. If we, as social workers, say that we believe in diversity and that we believe in social and economic justice, we must be willing to apply our organization’s financial resources to back up these words. This class provides you with information on how to apply resources to run programs in a responsible way. Without skillful application of such knowledge, an agency will not exist long.

### **Required Competency in Excel**

*This course presumes a basic knowledge of Microsoft Excel. If you do not already have a basic knowledge, then you MUST acquire it on your own. The actual skills needed are listed later in this syllabus.*

***YOU CANNOT DO WELL IN THIS COURSE WITHOUT THESE EXCEL SKILLS. YOU WILL NEED THEM DURING THE FIRST PART OF THE COURSE.***

### **Required Texts and Other Materials**

Martin, L. (2001). *Financial management for human service administrators*. Boston: Allyn & Bacon.

Lindahl, W. (2010). *Principles of fundraising*. New York: Jones and Bartlett.

There will also be other readings, videos and websites on that you must access via the internet.

## Course Outline/ Topics and Readings

### Note on Timelines and Due Dates

- All weeks begin on **Monday**; thus
- All weeks end on **Sunday**.
- All assignments, unless otherwise noted, are due **by midnight Sunday** of that week — the day before the next week begins.

SOCW 6363 Course Outline and Spring 2014 Weekly Schedule					
Week	Dates	Lesson	Topics	Information	Assignments
1	Jan. 13-19	1	Introduction to Budgeting	<p>Martin, Ch. 1</p> <p><i>Budgeting for those Who Would Rather Not</i>  <a href="http://www.youtube.com/watch?v=jctviefQACk">http://www.youtube.com/watch?v=jctviefQACk</a>            (10 mins.)</p> <p>YouTube Video:  <i>Business Planning: Identifying your nonprofit's niche</i> (6 mins.)  <a href="http://www.youtube.com/watch?v=wP5pSJkunks">http://www.youtube.com/watch?v=wP5pSJkunks</a></p>	Post a self-introduction to the discussion board before midnight Jan. 19 (5 pts.)
2	Jan 20-26	2	<p>Principles of Fundraising: Theory and Practice</p> <p>History of Fundraising</p> <p>Theories of Fundraising</p>	<p>Lindahl, Chs. 1, 4 &amp; 5  <i>Are You a Fundraiser?</i>  <a href="http://www.youtube.com/watch?v=JnptquUZgPc&amp;list=PL32C2F9AF55AD0FE3">http://www.youtube.com/watch?v=JnptquUZgPc&amp;list=PL32C2F9AF55AD0FE3</a> (2 mins.)</p> <p><i>Exponential Fundraising</i>  <a href="http://www.youtube.com/watch?v=LFq14_FZINU&amp;list=PL32C2F9AF55AD0FE3">http://www.youtube.com/watch?v=LFq14_FZINU&amp;list=PL32C2F9AF55AD0FE3</a>            (7 mins.)</p>	Watch “Are you a fundraiser” and then post in discussion area answer to “How I am a fundraiser”. (5 points)

3	Jan. 27-Feb. 2	3	Program Structures Performance Measures and Evaluation	Martin, Chs. 2 & 6 <i>Measuring Impact and Mission for Nonprofits</i> <a href="http://www.youtube.com/watch?v=x8om4Q_i1vE">http://www.youtube.com/watch?v=x8om4Q_i1vE</a> (56 mins.)	Martin, Exercise 2.1 (20 pts.) See grading explanation below.
4	Feb. 3-9	4	Budgeting and Budgeting Systems Cost-Analysis	Martin, Chs. 7 and 8 <i>Budget Basics</i> <a href="http://www.youtube.com/watch?v=WvdvKHgn1hc">http://www.youtube.com/watch?v=WvdvKHgn1hc</a> (14 mins.)	Martin, Exercise 8.1 (10 pts.) Upload the excel spreadsheet and narrative that explains and justifies your answer separately
5	Feb. 10-16	5	Understanding Financial Statements Financial Analysis Ratios	Martin, Ch. 3 & 5 <i>Nonprofit Accounting 101</i> <a href="http://www.youtube.com/watch?v=2D6BOhg0gIU">http://www.youtube.com/watch?v=2D6BOhg0gIU</a> (64 mins.)	Find a copy of a statement of financial position (often found in annual reports) online or at your agency. Post it or provide a link and describe what the statement tells you in the discussion area of BlackBoard. (5 pts.)  In Martin, Exercise 5.1 (10 pts.)
6	Feb. 17-23	6	Basics of Accounting	Martin, Ch. 4 <b>NOTE: This is a challenging chapter and assignment. It will take more time than most of the exercises.</b>	In Martin, Exercises 4.4 (20 pts.)
7	Feb. 24-Mar. 2	7	Forecasting Differential Cost Accounting	Martin, Chs. 9 and 10	In Martin, Exercises 9.3 (20 pts.) and 10.1 (10 pts.). Create and upload these as separate documents.
8	Mar. 3-9	8	Setting Fees	Martin, Chapter 11	In Martin, Exercise 11.1 (10 pts.)
	Mar. 10-16		SPRING BREAK		

9	Mar. 17-23	9	Individual Donor Motivations The Fundraising Process	Lindahl, Chs. 2 & 7	YouTube video summaries and assessments, Part 1 due March 23.
10	Mar. 24-30	10	Internet fundraising	<p>Hoefer, R. (2012). From website visitor to online contributor: Three internet marketing strategies for nonprofits. <i>Social Work</i>, 57(4), 361-365.</p> <p><i>19 ways non-profits can use social media to connect with donors</i> <a href="http://www.youtube.com/watch?v=I0qhxej2wdA">http://www.youtube.com/ watch?v=I0qhxej2wdA</a> (52 Mins.)</p> <p><i>History in the Making, Part V: Fundraising with Indiegogo</i> <a href="http://www.youtube.com/watch?v=UT-BDeKRidk">http://www.youtube.com/ watch?v=UT-BDeKRidk</a></p>	
11	Mar. 31-Apr. 6		Government Regulations of Fundraising  Boards and Fundraising	<p>Lindahl, Chs. 6, &amp; 8</p> <p><i>Fundraising Responsibilities of Nonprofit Boards</i> <a href="http://www.youtube.com/watch?v=rzpo3eXEG_k">http://www.youtube.com/ watch?v=rzpo3eXEG_k</a></p>	
12	Apr. 7- 13		Fundraising Among Diverse Populations  Ethics in Fundraising	<p>Lindahl, Chs. 10 &amp; 11</p> <p>Harris, N. (2008). Fundraising in diverse populations. <a href="http://www.causeplanet.org/articles/article.php?id=129">http://www.causeplanet.o rg/articles/article.php?id =129</a></p> <p>Peck, K. (n.d.) Diversity essay: Native American fundraising <a href="http://www.afpnet.org/ResourceCenter/ArticleDetail.cfm?ItemNumber=3336">http://www.afpnet.org/Re sourceCenter/ArticleDeta il.cfm?ItemNumber=333 6</a></p>	

				<p>Appleton, C. (n.d.). Connecting with diverse communities.  <a href="http://carolynmappleton.wordpress.com/posts/ad-council-connecting-with-the-hispanic-market/">http://carolynmappleton.wordpress.com/posts/ad-council-connecting-with-the-hispanic-market/</a></p> <p>Association of Fundraising Professionals: Ethics  <a href="http://www.afpnet.org/ethics/">http://www.afpnet.org/ethics/</a></p> <p><i>Fundraising Ethics</i>  <a href="http://www.youtube.com/watch?v=ZFv8cI230Zc">http://www.youtube.com/watch?v=ZFv8cI230Zc</a></p>	
13	Apr. 14-20		Social Enterprise	<p><i>What is Social Entrepreneurship?</i>  <a href="http://www.youtube.com/watch?v=CnZP0mFlhkU">http://www.youtube.com/watch?v=CnZP0mFlhkU</a>  (2 mins.)</p> <p>The Coming Wave of Social Entrepreneurship  <a href="http://www.youtube.com/watch?v=tyayCoYMCEY">http://www.youtube.com/watch?v=tyayCoYMCEY</a> (20 mins.)</p> <p><i>Introduction to Social Entrepreneurship</i>  <a href="http://www.youtube.com/watch?v=f6233bQk5A0">http://www.youtube.com/watch?v=f6233bQk5A0</a>  (10 mins.)</p>	Final Paper due to instructor (300 pts.)
14	Apr. 21-27		Special Events	<p><i>Turning your special events participants into year-round donors</i>  <a href="http://www.youtube.com/watch?v=kik6PGThsGE&amp;list=PL14F7747C3C5C7A7E">http://www.youtube.com/watch?v=kik6PGThsGE&amp;list=PL14F7747C3C5C7A7E</a> (13 mins.)</p> <p><i>Special Events: Is this the right strategy for your nonprofit?</i>  <a href="http://www.grantspace.org/Multimedia/Video/Special-Events-Is-this-the-Right-Strategy-for-Your-Nonprofit">http://www.grantspace.org/Multimedia/Video/Special-Events-Is-this-the-Right-Strategy-for-Your-Nonprofit</a> (105 Mins.)</p>	

15	Apr. 28-May 4		Why you must do this work and do it well	Stigma, Choice and Change <a href="http://www.youtube.com/watch?v=pfat9BHB81o">http://www.youtube.com/watch?v=pfat9BHB81o</a> (9 mins.)	YouTube Video summaries and assessments, Part 2 (50 pts)
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## ASSIGNMENTS

In order to complete the assignments for the class, you will need contact with an agency that will provide you information about their budget and their internal workings.

### Required Discussion and On-line Participation Topics List

- **Introduce Yourself** (5 points).
  - After you read through the syllabus, please post a self introduction. This should include, but is not limited to, your name, past social work experience, what you most want to get from class, and what you perceive to be the most challenging aspect of the course. Try to provide a way for people to get to know you, even though we will all be on-line.
- Explain how you are a fundraiser and where your strengths are. What areas do you see needing strengthening? (5 points)
- **Financial Statements Examples: What Do They Mean?** (5 points) Due before midnight.
  - Post an example or more from your agency or elsewhere to the discussions area, and talk about what it or they mean.

**Exercises in Martin Book: (100 Points total).** Each student is expected to complete the assignments posted on the syllabus and upload them by midnight on the due date. This work is to be completed on one's own, not in collaboration with anyone else. No late submissions will be accepted—this will be enforced by the University Computer. Once midnight comes, nothing more will be accepted. Do not get into the habit of waiting until the last minute.

### Notes on Required Exercises in Martin

You have a number of exercises that come from the Martin book. These are listed in an earlier part of the syllabus.

Here are some important points about these exercises. **Failure to abide by these requirements will result in points being deducted or the assignment being given a zero if it is not turned in on time.**

- They must be turned in on time, that is, BEFORE midnight of the date they are due.



- You must use formulas in Excel to calculate the numbers, EVEN WHEN numbers are in the book. For example, the book may provide a total of a column of figures for you, but you MUST use a formula to calculate it yourself. Think of this as a way to ensure that you understand how to create and use formulas in Excel. This should give you more confidence in your own work when it agrees with what is in the book.
- Another example: you MUST NOT calculate a number using your own math skills or calculator and then just insert the number in the Excel spreadsheet.
- When you save your file for uploading, be sure to use a file name something like this: YOURNAME\_EXERCISE4-2.xls

**YouTube Video and Outside Readings Summaries and Assessments, Part 1 (35 pts.) and Part 2 (50 pts.)**

There are a number of YouTube videos and outside readings that are assigned for you to watch and read. This assignment provides you an opportunity to critically assess each one in light of other information in the course. For each of the videos and outside readings, you must write a summary of the content, and critically assess it as it relates to other information (readings or other videos) from the course. You will turn this in in two parts: Part 1 covers the videos and outside readings assigned to be watched and read before Spring Break (due March 23). Part 2 covers videos and outside readings assigned between Spring Break and the end of the semester (due May 4).

**FINAL PAPER (300 points) (Maximum of 25 pages). (Must use APA latest style.) Analyzing an agency's finances and fundraising (300 points).** (Objectives 1-6). (due before midnight April 20.) This paper must be completed on your own. For this assignment, you need to use a **nonprofit** agency (not a government body) and look at its budgeting processes and sources of revenue. After you analyze all sources of revenue, you will make recommendations for improvements. In other words, think of yourself as a highly paid consultant brought in to help the agency understand better what it is doing well and what could be improved, particularly in light of the trends in funding for the arena within which that agency operates. Use APA style in writing this paper. **The outline for this paper must be followed and looks like this:**

- 1) **Executive Summary:** Provides a brief overview of the report and presents the key recommendations you are making.
- 2) **Introduction:** Tells the purpose of the paper and introduces the content of the report.
- 3) **Short Description of Agency:** Agency is described well enough that reader knows what problem(s) it is trying to solve, what it does, what its goals and objectives are, what the responsibility centers are, etc. An organizational chart is a required visual aid and explained. Include what at least one client outcome is, and define at least one unit of service that can be used for cost analysis purposes.
- 4) **What Agency is Currently Doing in Terms of Funding** (including trends for last 3-5 years) (Attach Form 990s from last 3 years)
  - a) *Describe the agency's "theory of fundraising" if any*

- b) *Summary of Agency's Current Financial Position* (using agency's financial statements and the financial ratios learned in class)
- c) *Summary of funding trends over at least past three years. Use financial ratios to show changes.*
- d) *Show minimum of 3-year trends in agency use of fees, government grants, foundation grants, donation, special events, social enterprise efforts and/or other ways of raising funds* (if applicable) and how much funding each provides.
- 5) **Analyze costs of achieving units of service and outcomes.** Use correct techniques in analyzing cost of units of service and outcomes and in forecasting at least two things that could be of use to the agency to know.
- 6) **Predictions of Funding Environment for Next Five Years for your agency:** Be sure to "personalize" your information
- 7) **Recommendations for Improving Current Practices.** (including Dealing with the Funding Environment for the Next Five Years, use of forecasts or information on setting fees, and so on. Be creative.)
- 8) **Conclusion**

**LATE WORK** (Other than for valid medical or other pre-approved reasons) WILL NOT BE ALLOWED

#### **INCOMPLETES/ MAKE UP WORK**

Incompletes will be given only for extreme situations that are discussed with the professor prior to the work being due (that is, not the day the work is supposed to be turned in). You must budget your time carefully.

#### **GRADING POLICY**

Points will be given for each assignment, with a total of 450 points possible. Your final grade will be determined very strictly according to the following scale:

Grading Scale Used to Determine Your Final Grade		
Final Grade	Percent	Points
A	90.0% and up	450 — 500 points
B	80.0% to 89.99%	400 — 449 points
C	70.0% to 79.99%	350— 399 points
D	60.0% to 69.99%	300— 349 points
F	less than 60.0%	299 or fewer points

Note: The process of grading involves the application of both subjective and objective components. Quality is an issue that involves the professor's professional judgment regarding how well the assignment has been completed. It is not a matter that can, in and of itself, be appealed.

**Drop Policy:** Students may drop or swap (adding and dropping a class concurrently) classes through self-service in MyMav from the beginning of the registration period through the late registration period. After the late registration period, students must see their academic advisor to drop a class or withdraw. Undeclared students must see an advisor in the University Advising Center. Drops can continue through a point two-thirds of the way through the term or session. It is the student's responsibility to officially withdraw if they do not plan to attend after registering. **Students will not be**

**automatically dropped for non-attendance.** Repayment of certain types of financial aid administered through the University may be required as the result of dropping classes or withdrawing. For more information, contact the Office of Financial Aid and Scholarships (<http://www.uta.edu/aao/fao/>).

**Americans with Disabilities Act:** The University of Texas at Arlington is on record as being committed to both the spirit and letter of all federal equal opportunity legislation, including the *Americans with Disabilities Act (ADA)*. All instructors at UT Arlington are required by law to provide "reasonable accommodations" to students with disabilities, so as not to discriminate on the basis of that disability. Any student requiring an accommodation for this course must provide the instructor with official documentation in the form of a letter certified by the staff in the Office for Students with Disabilities, University Hall 102. Only those students who have officially documented a need for an accommodation will have their request honored. Information regarding diagnostic criteria and policies for obtaining disability-based academic accommodations can be found at [www.uta.edu/disability](http://www.uta.edu/disability) or by calling the Office for Students with Disabilities at (817) 272-3364.

**Academic Integrity:** Students enrolled in this course are expected to adhere to the UT Arlington Honor Code:

*I pledge, on my honor, to uphold UT Arlington's tradition of academic integrity, a tradition that values hard work and honest effort in the pursuit of academic excellence.*

*I promise that I will submit only work that I personally create or contribute to group collaborations, and I will appropriately reference any work from other sources. I will follow the highest standards of integrity and uphold the spirit of the Honor Code.*

UT Arlington faculty members may employ the Honor Code as they see fit in their courses, including (but not limited to) having students acknowledge the honor code as part of an examination or requiring students to incorporate the honor code into any work submitted. Per UT System *Regents' Rule* 50101, §2.2, suspected violations of university's standards for academic integrity (including the Honor Code) will be referred to the Office of Student Conduct. Violators will be disciplined in accordance with University policy, which may result in the student's suspension or expulsion from the University.

**Student Support Services:** UT Arlington provides a variety of resources and programs designed to help students develop academic skills, deal with personal situations, and better understand concepts and information related to their courses. Resources include tutoring, major-based learning centers, developmental education, advising and mentoring, personal counseling, and federally funded programs. For individualized referrals, students may visit the reception desk at University College (Ransom Hall), call the Maverick Resource Hotline at 817-272-6107, send a message to [resources@uta.edu](mailto:resources@uta.edu), or view the information at [www.uta.edu/resources](http://www.uta.edu/resources).

**Electronic Communication:** UT Arlington has adopted MavMail as its official means to communicate with students about important deadlines and events, as well as to transact university-related business regarding financial aid, tuition, grades, graduation, etc. All students are assigned a MavMail account and are responsible for checking the inbox regularly. There is no additional charge to students for using this account, which remains active even after graduation. Information about activating and using MavMail is available at <http://www.uta.edu/oit/cs/email/mavmail.php>.

**Student Feedback Survey:** At the end of each term, students enrolled in classes categorized as “lecture,” “seminar,” or “laboratory” shall be directed to complete an online Student Feedback Survey (SFS). Instructions on how to access the SFS for this course will be sent directly to each student through MavMail approximately 10 days before the end of the term. Each student’s feedback enters the SFS database anonymously and is aggregated with that of other students enrolled in the course. UT Arlington’s effort to solicit, gather, tabulate, and publish student feedback is required by state law; students are strongly urged to participate. For more information, visit <http://www.uta.edu/sfs>.

**Final Review Week:** A period of five class days prior to the first day of final examinations in the long sessions shall be designated as Final Review Week. The purpose of this week is to allow students sufficient time to prepare for final examinations. During this week, there shall be no scheduled activities such as required field trips or performances; and no instructor shall assign any themes, research problems or exercises of similar scope that have a completion date during or following this week *unless specified in the class syllabus*. During Final Review Week, an instructor shall not give any examinations constituting 10% or more of the final grade, except makeup tests and laboratory examinations. In addition, no instructor shall give any portion of the final examination during Final Review Week. During this week, classes are held as scheduled. In addition, instructors are not required to limit content to topics that have been previously covered; they may introduce new concepts as appropriate.

**Emergency Exit Procedures:** Should we experience an emergency event that requires us to vacate the building, students should exit the room and move toward the nearest exit, [which is located outside of UTA since this is an on-line only course](#). When exiting the building during an emergency, one should never take an elevator but should use the stairwells. Faculty members and instructional staff will assist students in selecting the safest route for evacuation and will make arrangements to assist handicapped individuals. While it may seem silly to include this in the syllabus for an online course, inclusion of this verbiage as well as a brief discussion on the matter with your students at the beginning of the term is mandated by UT Arlington Procedure 7-6: Emergency/Fire Evacuation Procedures (<https://www.uta.edu/policy/procedure/7-6>).

**Librarian to Contact:** John Dillard is the Social Work Librarian. His office is on the first floor of the SSW building.

**E-Culture Policy:**

The University of Texas at Arlington has adopted the University email address as an official means of communication with students. Through the use of email, UT-Arlington is able to provide students with relevant and timely information, designed to facilitate student success. In particular, important information concerning registration, financial aid, payment of bills, and graduation may be sent to students through email.

All students are assigned an email account and information about activating and using it is available at [www.uta.edu/email](http://www.uta.edu/email). New students (first semester at UTA) are able to activate their email account 24 hours after registering for courses. There is no additional charge to students for using this account, and it remains active as long as a student is enrolled at UT-Arlington. Students are responsible for checking their email regularly.

**Make-up Exam Policy:** There is no make-up exam. It is offered during the 24 hours listed in the syllabus. Students are expected to complete the test during that time.

### **Bibliography**

- Dropkin, M. & LaTouche, B. (1998). *The budget-building book for nonprofits*. San Francisco: Jossey-Bass.
- Gross, M., Larkin, R., & McCarthy, J. (2000). *Financial and accounting guide for not-for-profit organizations* (6<sup>th</sup> ed.). New York: John Wiley & Sons.
- Maddux, D. (2006). *Budgeting for not-for-profit organizations*. New York: John Wiley & Sons.
- Mayers, R. (2004). *Financial management for nonprofit human service organizations* (2<sup>nd</sup> ed.). Springfield, IL: Charles C. Thomas.
- McLaughlin, T. (1995). *Streetsmart financial basics for nonprofit managers*. New York: John Wiley & Sons.
- Patterson, D. & Basham, R. (2006). *Data analysis with spreadsheets*. Boston: Allyn & Bacon.
- Peters, J. & Schaffer, E. (2005). *Financial leadership for nonprofit executives: Guiding your organization to long-term success*. Saint Paul, MN: CompassPoint-Wilder.

**Grading Explanation for Exercise 2.1 in Martin**

Think about the components of the Miami Cuban American Service Center. What makes the most sense to fit together under the title of “program”? Write a paper that answers all of the questions raised on p. 17 of Martin.

Paper Component	Possible Points
Executive summary: 1-2 pages, with overview and recommendations.	1
Narrative and inventory of agency’s services and activities	2
Program structure recommendations with full explanation	5
Responsibility center designation recommendations with full explanation	5
Conclusion	2
Writing, grammar, style, elements of written communication	5
Total possible	20

Student Name: \_\_\_\_\_

Grading for the Final Paper		
Aspect of the Paper	Possible Points	Your Points
<b>Executive Summary:</b> Provides a brief overview and presents the key recommendations you are making	10	
<b>Introduction</b> Tells the purpose of the paper and introduces the content of the report.	5	
<b>Short Description of Agency.</b> Agency is described well enough that reader knows what problem(s) it is trying to solve, what it does, what its goals and objectives are, what the responsibility centers are, etc. An organizational chart is present and explained. Include what at least one client outcome is, and define at least one unit of service that can be used for cost analysis purposes.	25	
<b>What Agency is Currently Doing in Terms of Funding</b> (including trends for last 3-5 years) (Form 990s are helpful here.) <i>Describe the agency's "theory of fundraising" if any; Summary of Agency's Current Financial Position</i> (using agency's financial statements and the financial ratios learned in class); <i>Summary of funding trends over at least past three years. Use financial ratios to show changes. Show minimum of 3-year trends in agency use of fees, government grants, foundation grants, donation, special events, social enterprise efforts and/or other ways of raising funds</i> (if applicable) and how much funding each provides.	120	
<b>Analyze costs of achieving units of service and outcomes. Forecast at least two things.</b> You use correct techniques in analyzing cost of units of service and outcomes and in forecasting at least two things that could be of use to the agency.	50	
<b>Predictions of Funding Environment for Next Five Years for your agency.</b> You predict what the funding trends are going to be for agencies like yours. General trends are "personalized" to this particular agency.	40	
<b>Recommendations for Improving Current Practices.</b> Your recommendations are reasonable and feasible.	10	
<b>Conclusion.</b> Your conclusion summarizes key points and brings the paper to a nice close.	10	
Details of writing, grammar, spelling, APA etc. are correct	30	
Total	<b>300</b>	



**SOCW 6363****Dr. Hoefer**

### Required Competencies in Microsoft Excel

If you do not already know how to perform these operations in Excel, you will be expected to learn on your own very quickly. Your exercises and take home test must be turned in having been completed, as much as possible, in Excel.

You should thus be able to:

- Define these terms:
  - Workbook
  - Worksheet
  - Cell
  - Cell address
  - Range
- Create a new workbook
- Create a new worksheet within a workbook
- Rename a worksheet
- Select a cell
- Select a range
- Enter and edit data
- Move, copy and delete cell content
- Enter and format dates
- Enter and format numbers
- Enter and format “strings” (words)
- Enter and copy simple formulas
- Enter and copy some functions (average, mean, median, sum)
- Formatting:
  - Adjust column width and row height
  - Insert rows and columns
  - Hide rows and columns
  - Unhide rows and columns
  - Wrap or shrink text
  - Create and modify borders and shading
  - Set headers and footers
- Charts
  - Create different types of charts (bar, line, pie, etc.)
  - Save charts within worksheet and as separate sheet
  - Copy chart to Word document