University of Wisconsin – Madison School of Social Work

Social Work 840, Advanced Macro Practice
Fall 2017 – Syllabus
Thursday, 3:30-5:25 (002); Social Work 114

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Office Hours: Thursday 1:00-3:00 at Social Work

Additional instructor: Dan Meyer
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Office Hours: Tuesday 3:30-5:00 at Social Work and by appointment

I. Catalogue Description

This course explores multiple approaches social workers use to influence groups, organizations, communities and systems. Concepts, theories and models of macro level practice and advance practice skills for addressing complex practice and organizational situations are examined.

II. Course Overview

Regardless of your chosen level of intervention – direct practice, community or group, organizational or policy – your future work as a professional social worker will regularly involve experiences that span the micro-macro spectrum, and thus require your ability to draw upon skills across that spectrum. This advanced course is designed to further develop your competencies in macro social work in the area of working effectively within, advocating for, and helping to develop and change human service organizations.

Beyond being a core component of social work, organizational management practice can be a particularly powerful promoter of social justice: it is often through managing organizations and social systems that formerly marginalized individuals and groups experience (re)enfranchisement, inclusion – and where social problems are addressed on a large scale. These skills and perspectives are the foundation for considering advocacy and issues of justice outside agencies as well.

This course will teach you about leading within human service organizations, from effectively interacting with and supporting people within the agency to managing current programs and developing and implementing new ones. It will provide you with more refined insights about how to be an effective member of such an organization. Finally, it will help you see the relationship between these skills inside agencies and how they can be used to support social justice at a broader level.

This course is required for all students in the advanced Generalist Specialization.
The class operates as an interactive seminar: you will learn about these skills by reading and writing about them, discussing them with the class, and engaging in in-class exercises.

The Tuesday 1:20 and Thursday 3:30 sections are paired. As detailed below, some content of this course will be taught by Professor Meyer, other content will be taught by Professor Dresser. This has the distinct advantage of a student being able to capitalize on two instructors with different expertise. Assignments will be graded by the faculty member responsible for that content, as noted; final responsibility for grades for this section of the course will be determined by Professor Meyer.

III. Course Competency, Description, and Dimensions

Social Work Education is framed by a competency based approach to curriculum design. At the conclusion of their education, social work students are expected to be competent in 9 core areas. Competency is achieved through mastery of course content as measured through course activities, readings and assignment and behaviors learned in field experiences, and which are derived from social work knowledge, values skills, and cognitive and affective processes. The competencies addressed in this course can be found in Appendix A.

IV. Course Content

Week 1: September 7: Introduction to Course (Meyer/Dresser)

Week 2: September 14: Social Work Macropractice, Ethics, and Social Justice (Dresser)

- Janet Finn (2016). *Just Practice*, Chapter 3: Ethics, Values, and Visions (pp. 94-138)
- Jabril Faraj (Dec 14, 2016) Nonprofits must alter focus to become force for social change, expert says. Milwaukee Neighborhood News Service. (http://milwaukeenews.org/2016/12/14/nonprofits-must-alter-focus-to-become-force-for-social-change-expert-says/?mc_cid=04adba524c&mc_eid=05aacc5f09)

*Lecture and pair discussion of ethical choices and tensions in ethics.*

*Lecture and class discussion of macropractice and systems thinking in social work.*

*In class group exercise that focuses on different codes of ethics, how they shape response to social problems, and how they relate to practice.*

Week 3: September 21: Strategic Planning/Organizational Assessment (Dresser and ~2 students)

- Brody & Nair, Chapter 2

*Lecture and class discussion on strategic planning and analyses to support it.*
Class discussion of assessment processes at the organizational and system level, with special attention to whether assessment and engagement processes reflect diverse perspectives and diverse groups of stakeholders.

Group SWOT exercise.

** Organizational Equity Assessment Assignment due September 26, 11:59pm

Week 4: September 28: Leadership, Inclusive Organizations, Teams and Boards (Meyer and ~2 students)
- Brody & Nair, Chapter 1, 9, 11, and 12

Lecture and class discussion on leadership approaches and leadership strategies for engagement.
Pair share on experiences of leadership in placements and organizations.
Class discussion of organizational board and advisory committees and their diversity.
Readings and class discussion of inter-professional teams and their role in the assessment and intervention processes.

Week 5: October 5: Evaluating Programs and Agencies/Logic Models (Meyer and ~2 students)
- Brody & Nair, Chapter 3

Lecture and discussion of approaches to program development, assessment and evaluation, including the role of research in evaluation.
Group work on building new programs and bringing evidence and research to support this type of intervention.

*Logic Model Assignment due October 10, 11:59pm (Meyer)*

Week 6: October 12: Community Needs Assessment/Collective Impact Response (Dresser and ~2 students)
● KU Community Tool Box Chapter 3: Assessing Community Needs and Resources. Read Sections 1-5, Section 8, and Section 9. All sections available here: http://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources


Lecture and discussion on assessment at the community level with focus on securing input from diverse voices/stakeholders and strategies for community engagement.

Group exercise on community needs assessment.

Discussion of ways in which assessment is linked to intervention and evaluation approaches

Discussion of collective impact strategies and the “equity” approach securing diverse input and reducing racial and ethnic disparity through them.

Week 7: October 19: Budgeting and Financial Management (Meyer and ~2 students)

● Brody & Nair, Chapter 13


Lecture and discussion on financial statements and budgets, with a focus on budgets as an intervention to improve organizational performance.

Lecture and discussion on financial statements, with discussion of how evaluating financial health is related to evaluating overall organizational performance

In class small group discussion/analysis of financial statements and organizational budgets.

Week 8: October 26: Resource Development (Meyer and ~2 students)

● Brody & Nair, Chapters 14-16


Lecture and discussion on resource development, with focus on resource development as an intervention to improve organizational performance and importance of evaluating resource development strategies.

Reflection on resource strategies in placements.

Small group work in class responding to RFPs.

*Financial Statement Assignment due October 31, 11:59pm (Meyer)*

Week 9: November 2: Legislative Advocacy (Dresser and ~2 students)

● KU Community Tool Box on Lobbying Decision Makers, Legislative Advocacy, and Developing and Maintaining Relationships with Legislators and their aides. (Chapter 33, section 7, 10, and 11):
Lecture and discussion on legislative advocacy and conceptualizing advocacy as an intervention at the system level.
In class small group work on legislative issues relating to social work at the state and federal level.

Week 10: November 9: Community Organizing for Advocacy (Dresser and ~2 students)
- KU Community Tool Box Overview on Conducting Advocacy Research (Chapter 31, Section 1 and read at least one of Sections 2-11): [http://ctb.ku.edu/en/table-of-contents/advocacy/advocacy-research/overview/main](http://ctb.ku.edu/en/table-of-contents/advocacy/advocacy-research/overview/main)

Lecture and discussion of community organizing, with attention to this macro approach to each stage of generalist practice: engagement, assessment, intervention, and evaluation.
In class small exercise on traditional v movement building approaches to social justice advocacy with questions on diverse populations and power issues within community level engagement.

*Advocacy Strategies Paper due November 14, 11:59 pm (Dresser)*

Week 11: November 16: Managing and Supervising Employees (Meyer and ~2 students)
- Brody & Nair, Chapters 5-7

Lecture and discussion of key aspects of management and supervision, with a focus on management and supervision as an intervention to improve organizational performance.
Discussion of experience inside placement of positive and negative management and supervision strategies.
Discussion of extent to which management and supervision strategies are inclusive of diverse groups

Week 12: November 30: Problem Solving Case Study/Role Play (Dresser)
B. Retrieved from e-PARCC Collaborative Governance Initiative, Syracuse University Maxwell School.
Part A is here: https://www.maxwell.syr.edu/uploadedFiles/parcc/eparcc/cases/KUJI%20Part%20A.pdf
Part B is here: https://www.maxwell.syr.edu/uploadedFiles/parcc/eparcc/cases/KUJI%20Part%20B.pdf

Class will be assigned roles in order to carefully consider perspectives in problems solving, community outreach in government programs, levels of operation and coordination, and incorporation of disadvantaged communities into the planning for, operation and evaluation of public programs.

Week 13: December 7: Life-long Learning, Celebration, Practice, and Possibility (Dresser)
- NOTE the reading for this session is tentative and will be confirmed by November 21

Class discussion of approaches to life-long learning, with a focus on further development of macro-practice skills and developing technologies.
Class discussion of celebration and sustained engagement with communities and social justice work, in placements, in future employment, and in society.

* Take Home Exam due December 10, 11:59pm

Week 14: December 12: Optional class
- Content to be announced

V. Texts and Reading Materials for the course

There is one required text for this course:

Other materials are available at Canvas. Students are also required to search out and read supplemental material pertinent to their specific assignments.

VI. Evaluation: Assignments, Grading and Methods

Assignments and Evaluation Methods: Six assignments contribute to the grade, with relative weights as follows: 20% Organizational Equity Assessment; 20% Financial Statement Assignment; 20% Logic Model Assignment; 20% Advocacy Strategies Paper; 10% Class Presentation Assignment; and 10% Take Home Exam. Not attending class can lower your grade; active participation can increase your grade if you are on the margin. Late papers will almost certainly be penalized and may not be accepted.

The instructor may (but need not) provide a possibility for extra credit. Details will be provided in class.
More details on all assignments are in the appendices.

Grading: Each assignment will be graded with a numerical score. The final grade will reflect the total points earned on all assignments. The assignment of letter grade to numerical score is based on the following general standard:

A  outstanding work, surpasses minimum expectations in most areas
AB  surpasses minimum expectations in some areas, but not in others
B  meets minimum expectations
BC  meets minimum expectations in some areas, but is below minimum expectations in others
C  below minimum expectations in most areas, not acceptable graduate-level work
D  clearly unacceptable in all areas
F  insufficient information for grading, multiple unexcused absences, or academic misconduct.

Some comments on grading:

● You may appeal a grade on a particular exam or assignment, but you must do so in writing, support your position with substantive arguments, and do so within one week of when the exam or assignment is posted.

● We expect written portions of all assignments to be typed, spell-checked, proofed for grammatical errors, and well-organized. Points will be deducted from your grade for sloppy work. If you need assistance with your writing, the Campus Writing Center is available as a free resource to all students.

VII. Course Policies

Code of Ethics, Professional Conduct & Plagiarism

Incoming MSW students read and signed electronic forms of the NASW Code of Ethics, the School of Social Work Plagiarism Policy and the Student Rights and Responsibilities. In doing so, they agreed that while in the MSW Program they would honor the NASW Code of Ethics and Student’s Rights and Responsibilities, as well as adhere to the Plagiarism Policy and that should they not do so, sanctions would be imposed. MSW students are expected to adhere to these policies in the classroom, in the field and in the preparation of course assignments.

Issues of academic misconduct affect all students and are considered extremely serious. Academic dishonesty, including cheating, plagiarism, and misrepresentation or fabrication of assignments, can result in course failure as well as disciplinary actions. It is your responsibility to ensure that all documents and material used to inform your assignments are appropriately cited. The Writing Center has a helpful guide to the difference between plagiarism and paraphrasing – see http://writing.wisc.edu/Handbook/QPA_paraphrase.html. The School’s plagiarism policy is posted on the web. This is extremely serious.

Accommodation for Students with a Disability

The University of Wisconsin-Madison supports the right of all enrolled students to a full and equal educational opportunity. The Americans with Disabilities Act (ADA), Wisconsin State Statute (36.12), and
UW-Madison policy (Faculty Document 1071) require that students with disabilities be reasonably accommodated in instruction and campus life. Reasonable accommodations for students with disabilities is a shared faculty and student responsibility. Students requiring accommodation, as approved by the McBurney Center, are expected to provide the instructor with a copy of their Verified Individualized Services and Accommodation (VISA) by the second week of the semester, or as soon as possible after a disability has been incurred or recognized. For more information, please contact the McBurney Center at mcburney@odos.wisc.edu; Phone at 608-263-2741; Text messaging at 608-225-7956; or by FAX at 608-265-2998, 711 (Via relay); Address is 702 W Johnson St #2104, Madison, WI 53706. Accommodations will not be made without a VISA. Faculty will work either directly with the student or in coordination with the McBurney Center to identify and provide reasonable instructional accommodations.

Disability information, including instructional accommodations as part of a student's educational record, is confidential and protected under FERPA.

Religious Observances

In accordance with University policy, accommodation will be made for students who are participating in a religious holiday or who have a conflict between religious observances and mandatory class requirements. To request accommodation, notify the instructor within the first two weeks of class of the specific days or dates on which a student requests relief.

Policies Regarding Expectations for Students

Students are expected to:

- Attend class each session, actively participating in the in-class exercises and discussions. If you cannot attend class, you are responsible for informing the instructor in advance, knowing what occurred and for getting any materials distributed during class.
- Read critically (and think about) all required assignments before coming to class. Most students find it useful to take notes.
- Complete all assignments by the due dates and times (thus you are expected to plan your life so that you can make the required deadlines in the course).
- Conduct themselves ethically and professionally. This requires careful consideration of and attention to issues of confidentiality with regard to clients and placement agencies. We will be talking about agencies in class and in assignments but care should be taken regarding private information. (If in doubt, please check with instructors.)
- Be respectful of the instructor and other class members--a diversity of views and opinions may be articulated during discussions. Respect includes cell phones being turned off and laptops being used in class only for taking notes.
- Provide respectful feedback to the instructor about parts of the course that are (or are not) facilitating their learning.

Policies Regarding Expectations for the Instructor

The instructor is expected to:
● Co-create a classroom environment that facilitates learning.
● Assure that course objectives are being met.
● Be available for in-person consultations, either through regular office hours or by appointment.
● Be available to address student questions through emailed correspondence.
● Give reasonable guidance on preparing for the assignments.
● Provide prompt feedback on evaluation materials for the course.
## Appendix A

NOTE: Descriptions of competencies include some material in parentheses that is covered in other courses and not necessarily covered in this course.

<table>
<thead>
<tr>
<th>Competencies and Description</th>
<th>Course Content relevant to Dimensions that Comprise the Competency*</th>
<th>Location in Syllabus</th>
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<tr>
<td><strong>2.1.1: Demonstrate ethical and professional behavior</strong></td>
<td>Lecture, reading, and discussion on personal values, professional values, and ethics. (K, V, S, C&amp;A)</td>
<td>Week 2</td>
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<td>Advanced Generalist social workers demonstrate and employ in a focus area an understanding of the value base of the profession and its ethical standards, as well as relevant laws and regulations that may impact practice at the micro, mezzo and macro levels. (They understand and utilize frameworks of ethical decision-making and autonomously apply principles of critical thinking to those frameworks in practice, research, and policy arenas.) Advanced Generalist social workers demonstrate awareness of their personal values and an ability to distinguish them from professional values. They also possess and employ an understanding as to how their personal experiences and affective reactions influence their professional judgment and behavior. Advanced Generalist social workers understand the role of other professions and use this understanding to engage effectively in inter-professional teams. They have a commitment to life-long learning and continually update their skills to ensure they are relevant and effective. Advanced Generalist social workers also are knowledgeable about the emerging forms of technology and ethically use this technology in social work practice.</td>
<td>Group exercise on professional codes of ethics, how they shape response to social problems, and how they relate to practice. (K, V, S, C&amp;A)</td>
<td>Week 2</td>
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<td>Lecture, reading, and discussion of inter-professional teams and social work’s role.</td>
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<td>Discussion of life-long learning.</td>
<td>Week 13</td>
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<td>Discussion of leadership in organizations and styles of leadership.</td>
<td>Week 4</td>
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<td><strong>2.1.2 Engage Diversity and Difference in Practice</strong></td>
<td>Lecture, reading and discussion related to dimensions of diversity at the organizational level. (K, S, C &amp; A)</td>
<td>Weeks 3, 4, and 11</td>
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<td>Advanced practice social workers demonstrate in a focus area an advanced understanding of how diversity and difference characterize and shape the human experience and are critical to the</td>
<td>Assignment: organizational equity</td>
<td>Appendix B</td>
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<td>Course Content relevant to Dimensions that Comprise the Competency*</td>
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<td>formation of identity.</td>
<td>assessment with racial or LGBTQ focus (K, V, S, C&amp;A)</td>
<td>Weeks 6 and 10</td>
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<td>They demonstrate comprehension that dimensions of diversity are understood as the intersectionality of multiple factors including but not limited to age, class, color, culture, disability and ability, ethnicity, gender, gender identity and expression, immigration status, marital status, political ideology, race, religion/spirituality, sex, sexual orientation, and tribal sovereign status.</td>
<td>Lecture, readings and discussion on engaging diversity at the community and systems level. (K, S, C&amp;A)</td>
<td>Week 12</td>
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<td>Advanced practice social workers recognize that, as a consequence of difference, a person’s life experiences may include oppression, poverty, marginalization, and alienation, as well as privilege, power, and acclaim, and apply this recognition in their practice.</td>
<td>Problem Solving Role play with case study focused on African American community/public agency interaction (K, S, C&amp;A)</td>
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<td>They also demonstrate in practice their understanding of the forms and mechanisms of oppression and discrimination, and a recognition of the extent to which a culture’s structures and values, including social, economic, political, and cultural exclusions, may oppress, marginalize, alienate, or create privilege and power.</td>
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**2.1.4 Engage In Practice-informed Research and Research-informed Practice**

(Advanced Generalist social workers understand and apply quantitative and qualitative research methods to advance the science of social work and practice in the focus area.)

They know and apply the principles of logic, scientific inquiry and culturally informed and ethical approaches to building knowledge in the focus area.

Advanced Generalist social workers understand and demonstrate that evidence informed practice derives from multi-disciplinary sources and multiple ways of

Lecture, readings and discussions relating to program evaluation and logic model development. (K, C&A)

Logic Model Assignment (which must draw on research and apply it to program planning area of macro-practice) (K, S, C&A)

Student presentations on agency approaches to using research to evaluate programs

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<td>Week 5</td>
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<td>Appendix C</td>
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<td>Week 5, Appendix F</td>
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<td>Competencies and Description</td>
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<td>knowing, demonstrate the processes for translating research findings into their focus area of practice.</td>
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<td><strong>Advanced Generalist social workers understand and demonstrate that engagement is an ongoing component of the dynamic and interactive process of social work practice in the focus area with, and on behalf of, diverse individuals, families, groups, organizations, and communities. They value the importance of human relationships.</strong></td>
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<td><strong>Advanced Generalist social workers understand and apply theories of human behavior and the social environment, and critically evaluate and apply this knowledge in the focus area to facilitate engagement with clients and constituencies, including individuals, families, groups, organizations, and communities. They understand and demonstrate an array of strategies to engage diverse clients and constituencies to advance practice effectiveness in the focus area.</strong></td>
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<td><strong>Advanced Generalist social workers demonstrate advanced understanding of how their personal experiences and affective reactions may impact their ability to effectively engage with diverse clients and constituencies in the focus area.</strong></td>
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<td><strong>They value and employ principles of relationship-building and inter-professional collaboration to facilitate engagement with clients, constituencies, and other professionals in the focus area.</strong></td>
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<td><strong>2.1.7 Assess Individuals, Families, Groups:</strong> Assess Groups, Organizations, and Communities</td>
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<td><strong>Advanced Generalist social workers independently engage and apply their understanding of theories of human behavior and the social environment in the ongoing assessment of diverse individuals, families, groups, organizations and communities in the focus area.</strong></td>
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<td><strong>2.1.8 Intervene with Individuals, Families, Groups: Intervene with Groups, Organizations, and Communities</strong></td>
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<td>implementing interventions in a focus area. They also engage in interdisciplinary, inter-professional, and inter-organizational collaboration as appropriate, in evaluating and implementing interventions.</td>
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<td><strong>2.1.9 Evaluate Practice with Individuals, Families, Groups: Evaluate Practice with Groups, Organizations, and Communities</strong> Advanced Generalist social workers recognize the importance of ongoing evaluation in the dynamic and interactive process of social work practice with, and on behalf of, diverse individuals, families, groups, organizations, and communities. They are knowledgeable about various methods of evaluating outcomes and practice effectiveness in a focus area and incorporate their knowledge of theories of human behavior and the social environment when evaluating outcomes. Advanced Generalist social workers employ qualitative and quantitative methods as appropriate for evaluating outcomes and practice effectiveness in a focus area.</td>
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*K=Knowledge; V=Values; S=Skills; C & AP=Cognitive and Affective Processes*
Appendix B: Organizational Equity Assessment

What is it?
In this assignment, students will assess organizational equity at their placement site. Drawing on Just Practice Chapter 6 (specifically on pp 269-76) students conduct an assessment of racial equity or LGBTQ equity in their organization. With prior approval of the professor, students may redesign the equity assessment grid for another vector of inclusion/exclusion such as ability status, age, etc. with

Just Practice refers to two tools from the Western States Center. These tools are available on-line and can be found here

The paper will be single spaced and 3-4 pages long. Assessment grids must be attached to the document. The papers and grids are due to be deposited at the Canvas assignments site by 11:59 pm on September 26, 2017.

What is the purpose?
The purpose of this assignment is to focus students on their placement sites as organizations, introduce one approach to organizational assessment, to have students engage with issues of equity and justice in that assessment, to encourage integration and synthesis across readings on organizational assessment, and to help students think about the organizations as sites of macro practice.

What are the details?
After filling out the grid, students will write papers with the following content.
1. Report on Assessment results:
   Be sure to cover: What did you assess and why? Summarize key findings from the assessment process. How is your organization doing on key issues in equity and inclusion?

2. Consider and describe organizational context:
   Be sure to cover: Do you think co-workers and leaders/managers at your organization would have come to similar conclusions considering these questions? Do you think others at the organization would embrace or resist an opportunity to engage in this process? Why?

3. Critical reflection:
   Reflect on the process of considering your organization through this equity lens. The following questions should help shape your reflection, but you need not answer every single question here; you may dig deeper into fewer answers or find other avenues, given your organization, the grid results, etc.: Have you learned anything new in this process? Have you gained insights about your organization or about how equity might be improved in it? Do you have thoughts on what the next steps for your organization might be, if it was considering an initiative in equity? Do you think the grid is asking the right kind of questions? Do you think something important has been left out?

How will it be graded?
The assignment is worth a total of 20 points. Points will be rewarded for the following:

- Grid and discussion of the grid results: 3 points
- Discussion of organizational context: 4 points
- Critical reflection: 6 points
- Integration of key themes from reading assignments: 3 points
- Overall clarity of writing, structure of paper: 4 points

Appendix C: Logic Model Assignment

What is it?
This is a 3-5 page single-spaced paper in which you present a Logic Model covering a program within your agency. The papers are required to be submitted to the canvas course site by 11:59pm on October 10, 2017.

What is the purpose?
Logic Models are often used in program development and planning and many funders encourage or require the use of logic models in grant applications to demonstrate the theory of change behind a program being proposed for funding. This exercise is designed to give you the opportunity to demonstrate that you can apply this tool to a program in your agency and to sharpen your assessment, planning, and evaluation skills. Moreover, this exercise will help to develop your capacity to identify and evaluate theories of change that undergird social service programming.

What are the details?
The assignment is a 3-5 page single-spaced paper that presents and explains a Logic Model that underlies a program or program expansion/enhancement that you select, but within your agency. You can select a new program or a program expansion or enhancement (but do not select an entire department or agency) for which you would like to seek funding. For this assignment, you will need to consult with at least one agency member as well as one or more archival documents (presumably some written description for the program/service on which you’re focusing). You may not use a program for which a formal logic model exists or a program that you have developed a logic model for as a part of another class.

The paper should have 4 parts: (a) Visual Representation of the Logic Model (this could be a figure or table). (b) Description of Program. This would be 1-2 paragraphs in which you describe the proposed program (or program expansion or enhancement) about which you provided the logic model; (c) Key Assumptions. In 1-2 paragraphs, outline the assumptions, including both explicit and implicit assumptions that the program designers made that will enable it to have its impact and achieve success. In other words, what does the program assume will occur, what conditions exist in the world, or what is the state of current research evidence that will allow the program to accomplish its planned outcomes? (d) Analysis of Assumptions. In 3-4 paragraphs, evaluate the validity (believability, plausibility) of each of the assumptions. Do they have a basis in data, experience or other sources of fact? Do they make sense? Do they seem reasonable? Provide evidence to support your analysis with the proper citations.

How will it be graded?
Logic Model Assignments are graded on a 20-point scale. The criteria I will use to evaluate them are: (a)
Visual logic model (6 points): You provide a visual representation of the model that is consistent with those in the readings and that balances being comprehensive/thorough/detailed with being neat and easy to follow. (b) Program and assumptions description (6 points): You clearly describe the program and the underlying assumptions on which it is based. (c) Assumptions analysis (6 points): You critically assess the validity of the program assumptions. (d) Following directions and the quality and organization of writing (2 points).

Appendix D: Financial Paper Assignment
What is it?
The assignment is a 2-5 page single-spaced paper that has two parts, one on budgeting and one on financial reports. Full instructions will be provided at least two weeks in advance.

What is the purpose?
Every organization budgets, though not always well, and nearly every organization has to face a budget cut at some point. Further, not-for-profit organizations generally must file financial statements. This exercise is designed to increase a student’s skill in understanding budgets and financial reports as these relate to improved agency performance.

What are the details?
The first part of the assignment provides an agency budget and asks students to describe how they would approach cutting the budget by a particular amount, what tradeoffs they view as most important, and their final recommendations. The second part provides financial statements of an agency and asks students to analyze the financial health of the agency based on these statements. As noted above, more details will be provided in class and posted on Canvas. The assignment will be due on October 31, 2017, 11:59pm.

How will it be graded?
Grading is on a 20-point scale (14 points for the budgeting questions and 6 points for the financial statements). Criteria include: (a) following the assignment; (b) demonstrating familiarity with financial concepts; (c) provision of evidence that supports conclusions; (d) reasonableness of assumptions; (e) arithmetic accuracy; (e) clarity of writing.

Appendix E: Advocacy Strategies Paper
What is it?
In this paper, students will propose and describe elements of an advocacy campaign relating to a key issue for clients and/or their organization. The papers will be 3-4 pages single spaced and are due to be submitted to the canvas course site by 11:59pm on November 14, 2017.

What is the purpose?
The purpose of this paper is to demonstrate student’s understanding of key advocacy and organizing concepts in relationship to the needs of client’s and/or organization at their placement site.
What are the details?
The assignment will answer questions from Toolkit 10: Advocating for Change (http://ctb.ku.edu/en/advocating-change). The key questions to be answered are identified below. Students will draw on information provided in the KU Community Tool Box, Chapters 30-33 in responding to the list of questions from the Toolkit.

The Advocacy Strategy Paper will include the following sections
1. Identifying the Advocacy Issue
   Why is this an essential advocacy issue for clients or your organization?
   This section should provide a clear statement of the issue and the reason(s) you selected it. Your writing should use questions Section 1 a and b in the tool (Research the Issue ...) but need not answer each question in order.
2. Advocacy Goals (Directly from toolkit): State the broad goals and specific objectives for the advocacy effort. Include:
   a. Broad advocacy goals (e.g., meet otherwise unmet needs; reverse or correct a situation; prevent the loss of a valued asset; change public opinion)?
   b. Specific objectives (how much of what by when) (e.g., “By 2020, increase by 50% the public investment in early childhood education.”)?
3. Tactics (Questions directly from Toolkit): Describe the advocacy tactics you will use focusing on research and direct action tactics. First, select either (1) conduct advocacy research OR (2) Direct action campaign. (This selection should relate to the advocacy goals.) If you chose research: discuss your plan for that (drawing on the description of advocacy research strategies, Chapter 31). If direct action: describe tactics in a direct action campaign that you will use (drawing on the list of 20 direct action campaign tactics from Chapter 33. Select no more than three of the 20 tactics). In this section be sure to motivate and defend the approach you are proposing. Be clear on how these tactics will help secure your advocacy goals.
4. Organizational Fit. Reflect on the toolkit Q4: “Review whether the selected advocacy tactics fit the group’s situation and goals (i.e., fits the group’s style, makes use of available resources and allies, minimizes opposition, is flexible, is likely to work).” Is your proposed advocacy approach in keeping with your organization’s situation and goals? Why or why not?

How will it be graded?
The paper is worth a total of 20 points. Points will be rewarded for the following:

| Description and Motivation of Advocacy Issue | 4 points |
| Statement of Advocacy Goals | 3 points |
| Selection and discussion of Tactics to achieve goals | 6 points |
| Discussion of Organizational Fit | 3 points |
| Overall clarity of writing, structure of paper, integration of related readings | 4 points |

Appendix F: Class Presentation Assignment
What is it? For 10 class sessions, students (typically 2) will be assigned to provide a 4 minute presentation on some aspect of how the topic for that class plays out in their agency. Presentations may be followed by discussion (beyond the 4 minute timeframe). For example, on September 26 we will be
discussing strategic planning; selected students will present information on whether their organization uses a strategic planning process, describe it, and very briefly assess how the process fits (or don’t fit) with the readings.

What is the purpose? These agency vignettes will help ground our discussion in real-world issues; they will ensure students learn more about an aspect of their agency and think about the extent to which their agency is following best practices. They will require engagement of the week’s readings in the context of practice. By having multiple presentations, we may also get a sense of the variety of approaches that exist.

What are the details?
- Each student will present once. Students will provide preferences for the topic/week in which they will present; the instructor will make assignments taking into account these preferences.
- In some cases, students will be reflecting on agency practice that they have experienced. In others, students will need to research their agency approaches to the topic.
- Students will be given more precise instructions one week in advance.
- Power point presentations are encouraged; slides need to be provided to the instructor 24 hours in advance.
- The four-minute deadline is real; I will give you a warning and then will stop you mid-sentence. It would be wise to practice.

How will it be graded?
- Criteria for grading include following the assignment (responding to the questions asked in the precise instructions for that week), the student’s analysis of the way agency practice fits the readings, and general delivery (volume/voice/visual aids, holding our interest, etc.)

Appendix G: Take Home Exam

What is it?
On December 4, an exam will be posted on Canvas. This brief exam (~2 pages) will cover class readings from the semester. The exam will be due December 10, 11:59pm

What is the purpose?
The exam is intended to help students integrate the variety of topics covered in the course and to provide incentives for critical thinking about the course material.

What are the details?
The precise questions to be addressed, the format for response, and the grading structure will be in the December 4 posting.