RUTGERS, THE STATE UNIVERSITY OF NEW JERSEY
SCHOOL OF SOCIAL WORK
SYLLABUS

19:910:536 OTG
PROGRAM DEVELOPMENT AND STRATEGIC PLANNING

Term:
Instructor:
Email:
Phone:
Office hours:

I.   Catalog Course Description

Processes and techniques of strategic planning & program development in human service organizations from issue analysis and problem formulation through program design, resource mobilization, and implementation. Special attention to designing programs and meeting needs of populations at risk.

II.   Course Overview

Students develop the analytical and interpersonal skills necessary for program and strategic planning and management, and gain understanding of the politics of planning in an organizational, inter-organizational, and community context.

As students read through this syllabus, they should also remember to closely **review the School-Wide Syllabus** in Canvas or the Student Handbook to find information on the School of Social Work mission statement and learning goals, school-wide policies (including academic integrity policies and the standardized attendance policy), and student resources and supports.

III.   Place of Course in Program

This is the second of 2 required advanced practice courses in the Management and Policy (MAP) concentration. The prerequisite is satisfactory completion of the professional foundation courses.

IV.   Council on Social Work Education's Social Work Competencies

The MSW Program at Rutgers is accredited by the Council on Social Work Education (CSWE). CSWE's accreditation standards can be reviewed at www.cswe.org.

In keeping with CSWE standards, the Rutgers School of Social Work has integrated the 2022 CSWE competencies within its curriculum. The competencies assessed in this course include:

Competency 6: Engage with Individuals, Families, Groups, Organizations, and Communities

Social work practitioners engaged in management and policy practice often work in leadership roles in

organizations that deliver social welfare, healthcare, education, and human services or promote policy innovations in these areas. They understand the nature, process, and value of community engagement in order to tailor the services provided to meet the needs and aspirations of the various communities served; to make those services culturally competent and accessible for community members; to promote democratic processes; and to foster a sense of partnership between the organizations and the communities served. They can identify the structure, composition and general membership characteristics of the client, geographic, political, and professional communities in which they operate and engage with these communities. Social workers engaged in management and policy practice reflect on the reasons why they could and could not engage effectively with individuals, families, groups, organizations, and communities and document the lessons learned to ensure successful provisions of services in their future endeavors.

Practitioners of Social Work in Management and Policy:
- Observe, support, and/or participate with organizational leadership in efforts to establish a dialogue with members of the relevant communities and constituencies being served with the ongoing intention of promoting democratic process and community empowerment;
- Promote an organizational culture that values and rewards community engagement and service by its staff; and
- Identify and promote organizational practices that affirm the meaningful inclusion of community members across organizational levels, including those of governance, management, staff, and volunteers.

Competency 7: Assess Individuals, Families, Groups, Organizations, and Communities

Social work practitioners engaged in management and policy practice have developed the capacity to organize, manage, and support efforts relative to assessing the needs of diverse individuals, families, groups, organizations, and communities. They have the skills to develop and implement organizational, program, and policy evaluations and to create program and strategic plans to meet the current and future needs of the populations served by organizations, the organizations themselves, and the communities that are impacted, given the rapid and ongoing changes in organizational environmental forces.

Practitioners of Social Work in Management and Policy:
- Observe and/or contribute to organizations' efforts to assess their relationships to their environments, including the emerging internal and external forces affecting the organizations (i.e., through conducting community needs assessments, resource inventories, environmental scans, etc.);
- Engage in self-reflection to identify and counter one's own prejudices and stereotypes in the assessment process;
- Critically examine existing assessment processes to identify and change operations that perpetuate injustices;
- Contribute and add value to the development and implementation of program, organization, and community-wide planning processes designed to position the organization for efficacy in realizing program and organizational missions and goals; and
- Incorporate ongoing organizational and program evaluation and assessment in the analysis and management of program and planning processes.

Competency 8: Intervene with Individuals, Families, Groups, Organizations, and Communities

Social work practitioners engaged in management and policy practice design and manage the delivery of services and interventions targeted to individuals, families, groups, organizations, and communities. This may involve recruiting and retaining an adequate workforce; securing and managing the necessary funds and resources to support the interventions; partnering and collaborating with outside organizations; applying appropriate applications of information technology to support clients, staff and management; assuring services are inclusive and culturally competent; and exercising the initiative and leadership to build or strengthen an organizational culture that recognizes and rewards professionalism along with policies and programs that further social justice.

Practitioners of Social Work in Management and Policy:
- Observe, identify, lead, and/or support core management functions such as strategic management, human resource management, budget and finance, and information technology in an organizational context;
- Identify and /or apply the concepts, practices, and styles of organizational and community leadership and can assess their own strengths and limitations in these regards;
- Critically examine existing interventions to identify and change those that perpetuate injustices;
- Observe, communicate, and work with organizational and/or community governance and advisory structures;
- Contribute positively as a member of a team conducting marketing and fundraising activities, including grant writing, creating a culture of philanthropy within an organization or community, and serving as stewards of donated resources; and
- Identify how leadership may be used to anchor the mission, vision, and values within an organization; and motivate board members, volunteers, and employees to fulfill their roles in accordance with organizational missions and goals.

Competency 10: Develop Liberatory Consciousness

Social workers engaged in management and policy practice recognize their roles as liberation workers who are "committed to changing systems and institutions characterized by oppression to create greater equity and social justice." (Love, p. 470, 1980). They also understand and identify how racism and other forms of stigma, prejudice, discrimination, and oppression intersect to impact groups, organizations, and communities within which they work and live. They recognize their own power as well as systems of power and oppression in the organizations in which they work. Through advocacy, they challenge unjust systems of power and oppression. Such social workers understand and actively engage with the four elements of developing a liberatory consciousness (awareness, analysis, action, and accountability/allyship) to challenge stigma, discrimination, and oppression and promote social, racial, and economic justice with groups, organizations, communities, and society-as-a-whole. MAP-educated social workers will:

- Practice Awareness through continually examining their own power and privilege and that of the organizations with which they work to acknowledge systems of oppression in the structures and institutions where they work.
- Analyze how all systems of oppression impact groups, organizations, and communities within which they work and live.
- Act with intention to intervene when they encounter institutional racism and other forms of stigma, prejudice, discrimination, and oppression in groups, organizations, communities, structures, and/or institutions.
- Hold themselves Accountable and practice Allyship by consistently being aware of and evaluating how their actions and practices affect others and whether their actions are challenging oppression.

Explore the entire set of 2022 CSWE competencies.

V. **Course Learning Goals**
- To understand the process and techniques of social welfare planning, with a focus on strategic planning and program development & planning in social work and social welfare settings.
- To acquire an overview & critical understanding of the historical and theoretical development of planning in social work and social welfare, and conceptual frameworks guiding intervention.
- To demonstrate the influence of social work values and ethics in planning for programs and services that are responsive to the problems and issues of populations at-risk, including women, people of color, those with disabilities, and people of various sexual orientations.
- To understand how research evidence is used to inform planning practice, and how practitioners apply research evidence in an effectiveness-based planning approach.
- To appreciate and integrate multiple sources of knowledge including theory, empirical evidence, and practice wisdom to gain planning and administrative technical skills, and demonstrate their use in developing program and strategic plans.
- To demonstrate competence in planning as an intervention by understanding and practicing the steps of program and strategic planning including assessment of intra- and inter-organizational social, economic, political, and demographic environments and trends; operationalization of objectives and plan formulation; implementation design; and evaluation.
- To develop an understanding of the group processes involved in planning including work with task groups, and to practice techniques of structured group processes.
- To acquire knowledge about the effects of power, politics, and leadership on strategic and program planning and implementation and about the ways in which social workers can enhance democratic and inclusive processes and community participation.

VI. **Required Texts and Readings**
Texts used in this course are:

- Kettner, Peter M., Moroney, Robert, & Martin, Lawrence L. (2020). *Designing and managing programs: An effectiveness-based approach* (6th Ed.). Newbury Park, CA: Sage.

- Bryson, John M. (2018). *Strategic planning for public and non-profit organizations: A guide to*

strengthening and sustaining organizational achievement (6th Ed.). Hoboken, NJ: John Wiley & Sons.

Other required readings (separate from textbook) are available through the Rutgers University Library "Reading List" that is integrated into your Canvas course. To find your readings: Click on the "Reading List" tab in the Canvas navigation bar to the left hand side of the course. Please note: this list contains links to articles and other required readings separate from the textbook (if applicable). Please follow the syllabus and/or Canvas Readings and Resources page in each module for more specific required readings and resources for each week (including textbook/media).

For further instructions please click here for a video tutorial.

VII.   Course Attendance and Participation Policies

Attendance
Please refer to the school-wide syllabus for the standard attendance policy for classes in on-the-ground (traditional) program, intensive weekend program (IWP), and asynchronous online program. ***For this course in particular***, XX.

Late Assignments
Late assignments will <u>not</u> be accepted, unless the student has made arrangements prior to the assignment due date. The instructor reserves the right to reduce the letter grade for late assignments.

VIII.   Assignments and Grading

Students complete 2 written assignments: a program plan and final take-home essay exam on strategic planning. All written assignments **<u>must</u>** follow APA format.

Assignments will be weighted in your course grade as follows:

Class Participation	10%
Program Plan	50%
Final Essay Exam	40%

Assignment Descriptions

PROGRAM PLAN (50% OF GRADE)
Your assignment is to develop a program plan. You will choose a social issue and design a program that addresses that problem. Sources for the paper should include the assigned readings, class lecture and discussion, and additional research. **Assignment instructions will be posted in Canvas.**

FINAL ESSAY EXAM (40% OF GRADE)
The 3-4 question short-essay take-home exam will focus on strategic planning. The exam will be distributed at least 2 weeks before its due date One question requires the analysis of an existing strategic

plan from a nonprofit organization

## IX.	Course Evaluation

Rutgers issues a survey to evaluate the course and the instructor. This survey is completed by students online mid- and end-of-semester, and all answers are confidential and anonymous.

## X.	Course Outline

All readings should be completed prior to the start of the class for which they are assigned.

### Module 1	Introduction: Overview and Definitions

- Overview: Program planning and program development; strategic planning

Inclusive, participatory, democratic processes
- Range of approaches: action plans; task plans; tactical, operational, and contingency planning

- Effectiveness-based planning
- Alignment with liberatory consciousness framework
- Why plan?
- Effects of planning on organization capacity and outcomes

### Module 2	Social Planning History, Theory, & Philosophy

- Brief history of planning in social welfare:
- Contributions of theory to planning
- Frameworks: incrementalism, comprehensive planning, rational-technical models, socio-political
  Participatory action and democratic planning

Readings:	**Text:** Kettner, Moroney, & Martin. Chs. 1-2.

History resources:

Lindblom, C. (1959). The science of muddling through. *Public Administration Review, 19 (Spring):*79-88.

Liberatory consciousness:

Rutgers School of Social Work. (N.D.) The 4 A's: How to develop a liberatory consciousness. https://socialwork.rutgers.edu/sites/default/files/2022-06/Liberatory%20Consciousness%204As%20Infographic%20%282%29.pdf

Forester, J. (2008). Policy analysis as critical listening. The Oxford handbook of public policy, Goodin, R., Moran, M., & Rein, M. (Eds,), Chapter 6, pp. 122-149.

Module 3:   Program Planning & Development: Issue / Problem Analysis; assessing resources, needs, and gaps in service

- Issue identification
- Resource / asset analysis; needs assessment
- Limitations of 'needs assessments'
- Program planning as problem solving

Readings: Text: Kettner, Moroney, & Martin. Chs. 3-5.

Community Tool Box, Ch. 3, Sec. 1, *Developing a Plan for Assessing Local Needs and Resources.* Retrieved at: https://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/develop-a-plan/main. AND Sec. 4: *Collecting Information About the Problem.* Retrieved at: https://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/collect-information/main.

Loukaitou-Sideris, A., Wachs, M., & Pinksi, M. (2019). Toward a richer picture of the mobility needs of older Americans. *Journal of the American Planning Association, 85*(4):482-500.

Module 4:   Program Design: Program Outcomes, Goals, & Strategies
- Aligning program design with organizational mission
- Generating a program hypothesis
- Setting goals
- Developing objectives
- Components of objectives: time frame; target of change; results; measurement criteria; responsibility

Readings: Text: Kettner, Moroney, & Martin. Chs. 7.

Community Tool Box, Ch. 7, Sec. 7, *Involving people most affected by the problem.* Available at: https://ctb.ku.edu/en/table-of-contents/participation/encouraging-involvement/involve-those-affected/main.

National Council of Nonprofits (n.d.). Why diversity, equity, and inclusion matter for nonprofits. https://www.councilofnonprofits.org/running-nonprofit/diversity-equity-and-inclusion/why-diversity-equity-and-inclusion-matter

Willingham, M. (May 2023).   How to set diversity goals: 8 examples of DEI goals for work. The Diversity Movement.   https://thediversitymovement.com/how-to-set-diversity-

goals-8-examples-of-dei-goals-for-work/

Module 5:   Program Design: Logic Models

- Elements of program design
- Design as a creative process
- Formulating a logic model

Readings: Text: Kettner, Moroney, & Martin. Chs. 8

Innovation Network (N.D.). *Logic Model Workbook*. Retrieved at: https://www.innonet.org/media/logic_model_workbook_0.pdf.

Twis, M., Petrovich, J., Cronley, C., Nordberg, A., & Woody, D., (2023). Trauma and powerlessness among people experiencing homelessness: Implications for administrative practice. Human Service Organizations: Management. Leadership, and Governance, 47(2), 137-147.

Module 6:   Program Design: Program Structure, Staffing, & Timelines
Readings: Kettner, Moroney, & Martin, Ch. 9.

Community Toolbox. Ch. 19, Sec. 1, Criteria for choosing promising practices and community interventions, available at: https://ctb.ku.edu/en/table-of-contents/analyze/choose-and-adapt-community-interventions/criteria-for-choosing/main;

Module 7:   Program Support: Budgeting & Resource generation
Readings: Kettner, Moroney, & Martin, Ch. 13.

Community Tool Box. Ch. 43, Sec. 1, *Planning and Writing an Annual Budget.* Retrieved at: https://ctb.ku.edu/en/table-of-contents/finances/managing-finances/annual-budget/main.

Mayer, D. (2023). Simmer down now! A study of revenue volatility and dissolution in nonprofit organizatons. *Nonprofit and Voluntary Sector Quarterly, 52*(5), 1413-1433

Budgeting resources:

National Council of Nonprofits (2018). *Budgeting for nonprofits*. Retrieved from https://www.councilofnonprofits.org/tools-resources/budgeting-nonprofits.

Lange, S. (2019). Budgeting for breakeven and other common fundraising mistakes. *Human Service Organizations: Management, Leadership, and Governance, 43*(2):68-73.

Toft (2017). *Employee compensation: Best practices for nonprofits.* Retrieved from https://www.missionbox.com/article/144/employee-compensation-best-practices-for-nonprofits.

The Wallace Foundation (2018). *Program-based budget builder (downloadable Excel spreadsheet for creating a single or multiple program budgets).* Retrieved from http://www.wallacefoundation.org/knowledge-center/resources-for-financial-management/pages/program-based-budget-template.aspx.

Grantwriting and fundraising resources:

National Council for Nonprofits (2018). Grant Research Tools. Retrieved at: rhttps://www.councilofnonprofits.org/tools-resources/grant-research-tools.

Entrepreneur (2014). 6 fundraising strategies for your nonprofit. Retrieved at*:* https://www.entrepreneur.com/article/233136.

Killoran, J. (2019). *The nonprofit grant writing guide: How to apply for funding.* https://snowballfundraising.com/nonprofit-grant-writing-guide/.

Module 8:   Evidence infused programming: Performance measurement, monitoring, and evaluation
- Implementing evidence-infused program planning
- Relation between effectiveness-based approaches and evaluation
- Performance measurement
- Program data collection
- Evaluation and monitoring
- Linking evaluation and measurement to written program objectives

Review components of program development
- Aligning all components of the program plan
- Program plan proposals and questions
- Review logic models; objectives; budgeting

Readings: Kettner, Moroney, & Martin, Ch. 10.

Divyadarhini, S. (February 2024). Building efficient nonprofits with MIS: A starter guide. Zoho. https://www.edzola.com/post/building-efficient-non-profits-with-mis-a-starter-guide

Iverson, M., Dentato, M., Perkins, N., & Wathen, M. (2023) The unintended influence and implace: Funder-mandated performance-metrics, service delivery, and social justice. Human Service Organizations: Management, Leadership, and Governance, 47(5), 385-403.

Hu, M., & Stoeker, R., (2024). Using participatory action research as a liberatory tool in nonprofit organizations. *Public Integrity, 26*(6), 662-273.

Module 9:   Program Plan Presentations

Module 10:   Initiating the Process
- Organizational strategic planning: definitions and purposes
- Overview of the 10 steps of strategic planning
- Constituent participation and inclusivity as essential elements
- Initiating the process: Champions; core planning group

Readings: TEXT: Bryson, Chapters. 1-3.

George, B., Walker, R., Monster, J. (2019). Does strategic planning improve organizational performance? A meta-analysis. *Public Administration Review, 79*(6), 810-819. **https://doi.org/10.1111/puar.13104**

Division of Equity and Inclusion, University of California, Berkeley (2015). *Strategic Planning for Equity, Inclusion, and Diversity: Toolkit.* https://diversity.berkeley.edu/sites/default/files/admin_strategic_planning_toolkit_final.pdf

Module 11:   Creating/Clarifying the Mission and Vision
- Strategic planning as mission-focused
- Difference between mission and vision
- The processes of creating or clarifying mission and vision
- Roles of consultants in the strategic planning process

Readings: TEXT: Bryson, Chs. 4 & 8.

Re: Charity. (June 2024). Nonprofit strategic planning: Should you hire a consultant? https://recharity.ca/hiring-a-strategic-planning-consultant/#:~:text=Because%20of%20this%2C%20it's%20important,a%20contract%20with%20the%20consultant.

Community Tool Box, Ch. 8, Sec. 2: Proclaiming Your Dream: Developing Vision and Mission Statements. Retrieved at: https://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/vision-mission-statements/main.

Module 12:   Environmental Assessment & Strategic Issue Identification
- Components of external and internal environmental assessments: What is feasible?

- Conducting a SWOT (or SWOC) analysis
- Techniques for identifying strategic issues (surveys; focus groups; Delphi and Nominal Group Techniques (NGT))

Readings: TEXT: Bryson, Chapters 5 & 6.

McMillan, S., King, M., & Tully, M. (2016). How to use the nominal group and Delphi techniques. *International Journal of Clinical Pharmacy, 38,* 655-662. doi: 10.1007/s11096-016-0257-x

Fu, S., Cooper, K., Woo, D., Kwestel, M. (2024). Beyond stakeholder management: Organizational listening for nonprofit stakeholder engagement. *Nonprofit and Voluntary Sector Quarterly, 53*(4), 841-865.

BeLue, R., Taylor, K., Anakwe, A., Bradford, N., Coleman, A., Ahmed, M., & Ahmed, D. (2024). Putting culture first in community-based organizational strategic planning. *Organization Development Journal, 42*(2), 80-90.

Module 13:   Setting Goals, Objectives, and Strategies
- The importance of *strategic thinking*
- Aligning goals and objectives with mission and vision
- Ongoing engagement of stakeholders; participatory processes
- Choosing strategies.

Readings: TEXT: Bryson, Chapter 7

Module 14:   Implementation & Monitoring
Readings: TEXT: Bryson, Chs. 9- 11.

Community Tool Box, Ch. 8, Sec. 5: *Developing an Action Plan*. Retrieved at: https://ctb.ku.edu/en/table-of-contents/structure/strategic-planning/develop-action-plans/main.

Module 15:   Planning wrap up

Forbes (2011). *Ten reasons why strategic plans fail.* Retrieved from https://www.forbes.com/sites/aileron/2011/11/30/10-reasons-why-strategic-plans-fail/#5bc2c04d86a8.

Boardsource: Nonprofit strategic planning: Resources https://boardsource.org/fundamental-topics-of-nonprofit-board-service/nonprofit-strategic-planning/