



SPECIALIZED PRACTICE CURRICULAR GUIDE *for* MACRO SOCIAL WORK PRACTICE

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**2015 EPAS Curricular Guide
Resource Series**

Council on Social Work Education
Alexandria, Virginia

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COUNCIL ON SOCIAL WORK EDUCATION



Special Commission to Advance
Macro Practice in Social Work

Organization | Community | Policy

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Contents

Acknowledgments	v
Preface: Competency-Based Education	xv
Introduction	xix
Introduction to the Competencies: Underlying Assumptions Common to Macro-Level Practice	xxvii
Competency 1 Demonstrate Ethical and Professional Behavior	1
Appendix 1A: Case Vignette: College Counseling Center	10
Appendix 1B: Small Group Discussion: Administrative Dilemma	12
Appendix 1C: Supervision in the Organizational Context	15
Appendix 1D: Community Practice Ethics Case Studies	16
Appendix 1E: Identifying Your Leadership and Supervisory Style	19
Appendix 1F: Case Study: Organizational Culture	19
Appendix 1G: Reflecting on Advocacy	21
Appendix 1H: Advocate's Autobiography	22
Appendix 1I: Values Inventory for Policy Practice	22
Appendix 1J: Exploring Ethical Dilemmas From Field Internship	25

Competency 2 Engage Diversity and Difference in Practice 27

Appendix 2A: Cultural Self-Identification 39

Appendix 2B: Power Exercise 43

Appendix 2C: Privilege and Policy 46

Appendix 2D: Case Study: Spotlight on Youth Organizing 49

Appendix 2E: Engaging Diversity in Management and Administration:
Comprehensive Paper Assignment. 52

Appendix 2F: Preparing to Engage With a New Organization 53

Appendix 2G: Social Work Pioneers of Color Biographical Sketch. 54

**Competency 3 Advance Human Rights and Social, Economic, and
Environmental Justice** 57

Appendix 3A: Human Rights as a Frame for Policy Practice 67

Appendix 3B: Theories of Justice: Class Debate 68

Appendix 3C: Human Rights Policy Critique 69

**Competency 4 Engage in Practice-informed Research and
Research-informed Practice.** 71

Appendix 4A: Community Practice Methods Activity. 78

Appendix 4B: Turn the Curve for Result-based Accountability. 79

Appendix 4C: Community-based Participatory Action Research:
Neighborhood Assessment and Analysis Paper
and Presentation 79

Appendix 4D: Community-based Participatory Action Research:
Research Proposal and Study 81

Appendix 4E: Community-based Participatory Action Research:
Research Paper Instructions. 84

Appendix 4F: Grand Challenges Assignment. 86

Competency 5 Engage in Policy Practice 89

Appendix 5A: Case Vignette: Organizational Development 99

Appendix 5B: Case Vignette: ABC Agency. 100

Appendix 5C: Think Tank Activity. 102

Appendix 5D: “The Light of Day” Strikes Again: Legislator Profile. 103

Appendix 5E: Comparing Policy Analysis Frameworks 104

Appendix 5F: Policy Development Exercise. 105

Appendix 5G: Advocacy Policy Role Play 105

Appendix 5H: Historical Policy Analysis 108

Appendix 5I: Develop Volunteer Manual 109

Appendix 5J: Rural Advocacy Project. 109

Appendix 5K: Who Represents Me in Government? 111

Appendix 5L: Hearing Analysis. 113

Appendix 5M: Supreme Court Contributions to Social Policy:
Case Analysis 114

Appendix 5N: Legislative Proposal Assessment 116

**Competency 6 Engagement With Individuals, Families, Groups,
Organizations, and Communities** 119

Appendix 6A: Rebuttal of How to Conduct Yourself as a Practitioner Abroad. . . 129

Appendix 6B: Advocacy Communications Critique. 130

Appendix 6C: Identifying and Engaging Stakeholders. 131

Appendix 6D: Profiles of Elected Officials. 132

Appendix 6E: Survey of Advocacy Organizations. 133

Appendix 6F: Twitter Assignment 134

Appendix 6G: Interorganizational Engagement in Collaborations,
Coalitions, and Partnerships. 136

Competency 7	Assess Individuals, Families, Groups, Organizations, and Communities	139
Appendix 7A:	SWOT Analysis	150
Appendix 7B:	Assessing Teams	151
Appendix 7C:	Eco-Map: The Policy Context	152
Appendix 7D:	Financial Analysis	153
Appendix 7E:	Assess a Management Policy or Practice	154
Appendix 7F:	Performance Assessment	155
Appendix 7G:	Culturally Competent Programming Assessment	156
Appendix 7H:	Walking Community Assessment	162
Appendix 7I:	Strength-Based Needs Assessment	163
Appendix 7J:	Disability Meme	165
Appendix 7K:	Coalition Meeting Analysis	165
Appendix 7L:	White Paper or Position Paper	166
Appendix 7M:	Legislative Case Study	168
Appendix 7N:	System of Care Analysis	169
Appendix 7O:	Ecological Analysis of a Social Agency	171
Competency 8	Intervene With Individuals, Families, Groups, Organizations, and Communities	177
Appendix 8A:	Case Vignette: Community Center	184
Appendix 8B:	Policy Impact	185
Appendix 8C:	Using Social Media	185
Appendix 8D:	Mock Legislative Hearing	186
Appendix 8E:	You've Won! Now What?	187
Appendix 8F:	Strategy Chart Case Study	187
Appendix 8G:	Community Project	189
Appendix 8H:	Systems Problem Analysis and Practice Intervention	194

Appendix 8I: Developing a Policy Proposal. 197

Appendix 8J: Policy Critique 199

Appendix 8K: Designing an Advocacy Campaign for Social Change. 201

Appendix 8L: Legislative Testimony 202

Appendix 8M: Advocacy Strategy and Implementation 205

Appendix 8N: Advocacy Portfolio 207

**Competency 9 Evaluate Practice With Individuals, Families,
Groups, Organizations, and Communities 213**

Appendix 9A: Evaluating Policies. 221

Appendix 9B: Team Evaluation Project and Report 222

Appendix 9C: Evaluation Project 223

Appendix 9D: Online Exercises 231

Appendix 9E: Cultural Competence Evaluation Assignment. 234

Appendix 9F: Social Mapping 236

Macro Tools for the Field. 247

Preface: Competency-Based Education

In 2008 the Council on Social Work Education (CSWE) adopted a competency-based education framework for its educational policy and accreditation standards. Competency-based education rests on a shared view of the nature of competence in professional practice. Social work competence is the ability to integrate and apply social work knowledge, values, and skills to practice situations in a purposeful, intentional, and professional manner to promote human and community well-being. The Educational Policy and Accreditation Standards (EPAS) recognizes a holistic view of competence, that the demonstration of competence is informed by knowledge, values, skills, and cognitive and affective processes that include the social worker's critical thinking, affective reactions, and exercise of judgment regarding unique practice situations. Overall professional competence is multidimensional and composed of interrelated competencies. An individual social worker's competence is developmental and dynamic, changing over time in relation to continuous learning (CSWE, 2015, p. 6).

Competency-based education is an outcome-oriented approach to curriculum design. The goal of the outcome approach is to ensure that students can demonstrate the integration and application of the competencies in practice. In EPAS, social work practice competence consists of nine interrelated competencies and component behaviors that consist of knowledge, values, skills, and cognitive and affective processes.

Using a curriculum design that begins with the outcomes, expressed as the expected competencies, programs develop the substantive content, pedagogical approaches, and educational activities that provide learning opportunities for students to demonstrate the competencies (CSWE, 2015, p. 6).

SOCIAL WORK COMPETENCIES

The 2015 EPAS stipulates nine competencies for the social work profession. These competencies apply to both generalist and specialized practice. The nine social work competencies are listed in the 2015 EPAS on pp. 7–9. Each of the nine social work competencies is followed by a paragraph that describes the dimensions (knowledge, values, skills, and cognitive and affective processes) that make up the competency at the generalist level of practice. This paragraph informs the content that should be reflected in the generalist social work curriculum and represents the underlying content and processes that inform the behaviors.

The bullet points under the paragraph descriptions in the EPAS are a set of behaviors that integrate the dimensions of the competency and represent observable components of each competency. The dimensions of the competency inform the behaviors.

SPECIALIZED PRACTICE

Specialized practice builds on generalist practice, as described in Educational Policy (EP) 2.0 of the 2015 EPAS, adapting and extending the social work competencies for practice with a specific population, problem area, method of intervention, perspective, or approach to practice. Specialized practice augments and extends social work knowledge, values, and skills to engage, assess, intervene, and evaluate within an area of specialization. Specialized practitioners advocate with and on behalf of clients and constituencies in their area of specialized practice. Specialized practitioners synthesize and use a broad range of interdisciplinary and multidisciplinary knowledge and skills based on scientific inquiry and best practices and consistent with social work values. Specialized practitioners engage in and conduct research to inform and improve practice, policy, and service delivery.

The master's program in social work prepares students for specialized practice. Programs identify the specialized knowledge, values, skills, cognitive and affective processes, and behaviors that extend and enhance the nine social work competencies and prepare students for practice in the area of specialization (CSWE, 2015, p. 12).

FRAMEWORK FOR THE GUIDE

The CSWE Commission on Educational Policy (COEP) developed a framework for the development of curricular guides for areas of specialized practice. The task force followed the guidelines for creating macro social work competencies and curricular resources that reflect accreditation standards for master's programs, listed here:

- 1) Identification of an area of specialized practice for a specific population, problem area, method of intervention, perspective, or approach to practice in social work (EP M2.1).
- 2) Discussion of how the area of specialized practice builds on generalist practice as described in EP 2.0 (AS M2.1.1).
- 3) Identification of the specialized knowledge, values, skills, cognitive and affective processes, and behaviors that extend and enhance the nine social work competencies and prepare students for practice in the area of specialization identified (EP M2.1 and AS M2.1.3).
- 4) Suggested curriculum content and resources (e.g., readings, multimedia and online resources, modules, assignments, experiential exercises, class and field activities) for each of the nine social work competencies and any additional competencies identified. The curriculum content and resources identified in this guide are not required by accreditation standards and are meant to serve as an optional guide to programs on how to conceptualize macro social work practice with the nine social work competencies identified in the 2015 EPAS.
- 5) Identification of the competency dimensions (knowledge, values, skills, and cognitive and affective processes) associated with the course content for each competency.

ORGANIZATION OF THE GUIDE

Congruent with the 2015 EPAS and framework developed by CSWE's COEP, specialized practice for macro social work builds on generalist practice but augments and extends social work knowledge, values, and skills to engage, assess, intervene, and evaluate within administration and management

practice, community practice, and policy practice. Accordingly, for each of the competencies identified in this guide, there is a paragraph description of the dimensions—knowledge, values, skills, and cognitive and affective processes—that make up the competency and prepare students for macro social work practice. This is followed by a set of three or four behaviors to be attained by practitioners who are working with and on behalf of macro social work and their constituencies. Readings, in-class exercises, media and assignments, and whether they address knowledge, values, skills, or cognitive and affective processes are identified for each of the competencies. Descriptions of shorter selected assignments and in-class exercises for each competency are shown in the curricular map; longer activities or additional details are given in the appendices.

REFERENCE

Council on Social Work Education. (2015). Educational policy and accreditation standards. Retrieved from <https://www.cswe.org/Accreditation/Standards-and-Policies/2015-EPAS>

Introduction

We are pleased to present the *Specialized Practice Curricular Guide for Macro Social Work*. It enhances our understanding and implementation of the nine generalist-level competencies of the Council on Social Work Education (CSWE) 2015 Educational Policy and Accreditation Standards (EPAS) 2015 for macro practice. Herein we define *macro* as organizational administration and management, community organizing, and policy practice. Social work education, with its person-in-environment foundation, requires competency in macro and micro areas of practice in the classroom and in the field. This guide seeks to serve as an invaluable resource to faculty, students, field instructors, and supervisors who educate students to work effectively in the macro arena. We believe that these materials can also help to advance other areas of social work education, including programs that choose specializations or concentrations based on fields of practice, methods, or populations. CSWE competencies for generalist practice require that practice content at community, organizational, and policy levels be part of the social work curriculum.

BACKGROUND

Over the years, many social work educators and agency leaders have reported a decline in the number of social work students choosing to pursue macro courses and career tracks. In turn, this trend became the reason to eliminate or reduce macro specializations and curricula. Some states in the United States also began to license graduate social workers only at the clinical level. Furthermore, many social work graduates who gravitated toward macro careers took positions with titles that were not identified as social work or did

not require a social work degree. Due to this combination of factors our profession became more directed toward the micro/clinical practice. Almost as a self-fulfilling prophecy, if the marketing of an MSW program did not feature macro curricula and specializations, potential students might not know they could pursue this area of social work practice.

An analysis of the 2008 EPAS conducted by the Association for Community Organization and Social Administration (ACOSA) revealed that it did not sufficiently explain or explicitly identify the macro end of “practice.” In response ACOSA undertook a year-long process to develop a set of macro practice competencies, practice behaviors, and curricular resources for the 2008 EPAS, which the *Journal of Community Practice* and the *Encyclopedia of Social Work* published (Gamble & Soska, 2013). In 2012, Jack Rothman with Tracy Soska conducted a survey through the ACOSA and its members, as well as faculty of CSWE-recognized macro programs in schools of social work. They identified the marginalization of macro faculty, curricula, and field placements. Rothman subsequently issued a report (Rothman, 2013) that identified the declining influence of macro practice in social work education. He called for a strategy that would provide a greater presence and awareness of macro issues, by increasing the macro curricula and recruiting more macro-oriented students within social work education.

In response, ACOSA leaders created the Special Commission to Advance Macro Practice in Social Work (SC) in July 2013. Shortly thereafter, Darlyne Bailey and Terry Mizrahi were invited to serve as co-chairs of the SC and many kindred others volunteered to assist with the massive undertaking. The SC recruited eighteen prominent social work educators and leaders to serve as commissioners. As of this printing, the SC includes 30 commissioners, joined by an engaged community of more than 500 allies, individual and organizational supporters, and 90 + investor schools from among accredited BSW and MSW programs. These investor deans, directors, and department chairs have contributed financially or in-kind through faculty support to the advance the SC’s goals and agenda. The SC also received formal affirmation or endorsement from the CSWE, the National Association of Deans and Directors (NADD), and the National Association of Social Workers (NASW). Each year,

social work educators report the various ways they visibly “make macro matter” in their recruitment, curricula, field internships, and alumni connections.

The SC promotes two overarching goals. The first is ensuring that by 2020, 20% of all graduate-level social work students nationally have chosen macro social work as an area of specialization (for the MSW programs that have identified areas of specialization). The second goal is to rebalance micro and macro curricula in the programs that are identified as integrated practice or advanced generalist. Rebalancing means including a comparable amount of identifiable macro practice as micro content in classroom and field curricula, or producing innovative models for uniting the range of practice competencies.

Since 2013, we have implemented several strategies that achieve these goals. We provided the CSWE Commission on Educational Policy (COEP) and Commission on Accreditation (COA) with critical input for the 2015 EPAS. This included a more comprehensive definition of social work practice that more explicitly incorporates the term *macro* at the organization, community, and policy areas of practice throughout. A defining feature of the final 2015 EPAS now includes a holistic view of competency-based practice behaviors as observable actions that demonstrate an integration of competence informed by knowledge, values, skills, and cognitive and affective processes.

Another SC strategy, with ACOSA as its partner organization, reached out to other macro-related organizations—the Network for Social Work Management (NSWM), Influencing Social Policy (ISP), Macro Social Work Student Network (MSWN), and the Twitter Chat Collaborative (#MacroSW). Together we formed the “United for Macro” partnership. (For more information, please see <https://www.acosa.org/joomla/about-the-special-commission>).

PHASES IN THE DEVELOPMENT OF THE GUIDE

Phase 1: Initiating the Guide

An ongoing dialogue between the SC and CSWE resulted in the identification of the need for a *Specialized Practice Curricular Guide for Macro Social Work* as the fifth in a series of guides published by CSWE. The macro guide provides specific, detailed curricular content and resources for social work educators, students, and practitioners to use in creating or enhancing macro curricula in the classroom and field.

Together we created a multiphase process designed to engage many stakeholders and contributors in the task of adapting and extending the nine competencies from the 2015 EPAS into a specialized macro practice guide that usefully included a section for field education resources.

To ensure an inclusive and comprehensive process, the SC invited ACOSA, the NSWM, and ISP to each designate a focus area team leader in their respective areas of community, administration and management, and policy practice. CSWE and the SC sent a letter to the deans and directors of all CSWE accredited programs asking them to nominate a faculty member to participate in new the National Task Force for the Macro Guide that would develop this inaugural guide.

Working with the SC co-chairs and CSWE representatives, the three focus area team leaders each invited three additional colleagues from among this National Task Force to join their team. This collective became the Coordinating Committee, responsible for providing the overall direction and guidance of the National Task Force. The SC also selected a two-student team to join the Coordinating Committee so ensure the presence of the student perspective and to provide administrative support. Lastly, CSWE hired a consultant who became part of the Coordinating Committee, to provide additional expertise on issues related to race and racial equity. Ultimately, the National Task Force for the Macro Guide consisted of members of the Coordinating Committee and nominated faculty together representing about 75 social work programs across the United States.

Phase 2: Convening the National Task Force

In September 2017, National Task Force held a 2-day meeting at Catholic University in Washington, D.C. The participants deliberated in small and large groups and explored the structure and content of the nine competencies as applied to the three focus areas. This began an iterative process among members of the Coordinating Committee, with additional input solicited from other field education colleagues. During the September meeting members of the National Task Force refined the competencies and practice behaviors. The Task Force then formed working teams that cut across the three focus areas to integrate content on the three focus areas within each of the competencies for both descriptions and practice behaviors.

The outcome of the larger collective process was further refined by the focus area teams who integrated the descriptions and practice behaviors. The members of the National Task Force also established a consulting group to operationalize the competencies within field placements.

Phase 3: Forming Work Groups

Following the National Task Force meetings, each focus area team leader reached out to team members for recommendations of curricular resources for each of the competencies (i.e., readings, field activities, class activities, media, assignments, and case studies). In addition, the consultative group on field education suggested field resources for the competencies. In addition to further integration each focus area team designated a team member to one or more work group focusing specifically on each competency and a point person to coordinate these working sessions over the upcoming months. These focus area work groups within each focus area team compiled and refined their recommendations regarding definitions, competencies, and behaviors. These were reviewed and finalized by the focus area team leaders.

Phase 4: Integrating the Competencies Across Focus Areas

During this process, the focus area team leaders regularly met and intensively prepared a document that integrated the definitions and practice behaviors for each competency as provided by the collaborative working groups across three focus areas. The focus area team leaders also worked together, competency by competency, to review, revise, and finalize a draft of definitions and set of practice behaviors for each competency. They then shared these integrated definitions and sets of practice behaviors within their respective focus area teams for further review and input for final drafts for each competency definition and set of practice behaviors.

Concurrently, the focus area team leaders worked extensively to develop a final compendium of curricular resources applicable to each focus area for each competency, which were also reviewed by the focus area team work groups. The Task Force forwarded all documents the SC co-chairs and the student team for review, revisions, input, and finalization.

Phase 5: Completing and Producing the Guide

In early June 2018, the macro guide focus area leadership teams, the SC co-chairs, and the student team members of the Coordinating Committee completed a final draft to send to the 75 National Task Force members and the consultant for review and comment. CSWE published and distributed the first-ever *Specialized Practice Curricular Guide for Macro Social Work* in fall of 2018, a year after the convening of the National Task Force. Distribution and celebration of this guide were planned for the CSWE 2018 Annual Meeting held in Orlando, Florida.

CONCLUSION

The multilayered structure and iterative and reiterative process used to produce this guide were purposeful. Our goal was to provide a highly informative guide that maximally enabled inclusivity, multivocality, accessibility, and transparency. The curriculum content and resources outlined in this guide can serve as resources for programs when conceptualizing and delivering specialized macro practice. For each competency, guide users can access and select from the suggested resources, including full descriptions of in-class exercises and assignments, by clicking on the associated URLs. We also recognized that most macro competencies included in this guide can be addressed in multiple courses, linked to more than one of the nine social work competencies, or may be field focused. Relatedly, some curricular resources, particularly in-class exercises, assignments, and field experiences, can be used to support the attainment of more than one competency.

The examples and resources included in this guide represent only some that are available within social work and fully address all possible subareas or subgroups within macro social work practice. Nonetheless the excellent content can be used to develop macro courses or a comprehensive macro program. Additional references, resources, and course syllabi can be found on the websites of ACOSA, CSWE's Policy Clearinghouse, ISP, and NSWM. Finally, the section on Macro Tools for the field included field-related classroom assignments related to each competency. In addition, some in-class exercises can be modified for field assignments and vice versa.

As with any curricular guide, the Task Force members made steadfast and concerted efforts to avoid a binary gender identification when using pronouns such as *he* and *she* by including nouns such as *student*, *faculty*, *staff*, and *community members*. Some redundancies, gaps, and areas for further development are inevitable. The intent of this guide is to provide a solid foundation for social work education programs to develop and enhance their own macro content to ensure that their graduates acquire competencies for specialized macro practice or robust macro content in a generalist or integrated programs within the EPAS 2015 curriculum design.

We encourage our faculty and field colleagues to bring a critical eye and to add or modify resources as needed to best align with their respective program's mission, context, and specialized curricular structures. We believe that this guide supports the overall goal of ensuring that we prepare future social workers to engage in macro practice. We hope you will agree!

Introduction to the Competencies: Underlying Assumptions Common to Macro-Level Practice

Macro social work practice includes three primary focus areas: administration and management (focusing on the organizational environment), community practice (focusing on the community environment defined by geography, identity, or issue), and policy practice (focusing on the public policy environment). The following assumptions cut across each of the three competency descriptions and inform our work:

- Societal ills based on injustice, inequality, or inequity cannot be ameliorated or lessened without social workers individually and collectively understanding and addressing systemic and structural root causes. These require practitioners with competencies in community, organizations, and policy analysis and change.
- Macro social workers, who sit at the intersection of the individual and society, recognize the interconnections and interdependencies between micro and macro systems. These social workers are well positioned to address a wide range of societal challenges and to engage in macro policy practice on many fronts.
- Macro social workers adhere to professional codes of ethics and advance the social work principles of social and economic justice.
- Macro social work practice has at its core identifying and dismantling structural racism, sexism, heterosexism, classism, ageism, ableism and other forms of marginalization, oppression, and discrimination in communities, organizations, and public policy.

- Macro is direct social work practice. It is integral to working with individuals, families, and small groups (the micro end of social work) and is critically important to the life chances and well-being of all people, especially vulnerable populations.
- Macro practice occurs through partnerships with clients, constituencies, and communities. This process of engagement builds on their strengths and is informed and guided by their experiences and recommendations.
- Macro practice requires a sophisticated understanding of the prevailing social, economic, and political contexts that shape living and working conditions at the local, state, and national levels.
- Macro-level change is a process that requires thoughtful, deliberate, and strategic analysis, planning, communication, and intervention.
- Macro practice calls for working collectively to prevent social problems, ameliorate adverse conditions, and effect positive social change in government, organizational, and community settings.

DISTINCTIONS AMONG THE THREE AREAS OF MACRO PRACTICE

Although areas of overlap and permeable boundaries prevail among the three macro focus areas the following differences also exist.

CORE FOCI

Administration and management practice. Social workers in the administrative and management area focus on aspects of human service agencies and organizations that provide resources and services especially for vulnerable populations and those most at risk. Macro practice social workers in this area understand leadership behaviors, performance management, organizational behavior, evidence-based or promising practices, finances, and budgeting and know how these features of organization life interconnect and influence service effectiveness and talent management.

Community practice. Social workers in community practice recognize that the social environment that sustains all people consists of many types of

communities, including geographic, identity and cultural, faith or spiritual, mutual interest, organizational or associational, and more. People belong to many different communities simultaneously; therefore, social work practice in communities targets diverse stakeholders, constituencies, and power holders.

Policy practice. Social workers in policy practice shape and affect broad social systems and institutions where laws, regulations, policies, and other wide-ranging decisions that affect human well-being are made. Policy practice focuses predominantly on influencing the policy-making process of local, state, and national levels of government, in the executive, legislative, and judicial branches, and in electoral politics. Policy practitioners strive to amplify the voices and perspectives of marginalized populations within the political arena.

MACRO SOCIAL WORKERS USE SPECIFIC KNOWLEDGE AND SKILLS TO INTERVENE IN THEIR MAJOR PRACTICE ENVIRONMENTS

Organizational environment. Social workers in administration and management practice intervene to align organizational missions with outcomes through service delivery to people, particularly vulnerable populations and those who are at risk. These environments include large public settings, smaller public settings, private nonprofit settings, and private for-profit settings.

Community environment. Social workers in community practice engage with community partners to mobilize on issues and needs, develop services and strategies that enhance community well-being, and build community capacity. Community practitioners work in a range of settings, including community and neighborhood-based organizations, faith-based organizations, community development corporations, public development agencies, and broader human services agencies in public, private nonprofit or for-profit sectors, and coalitions, collaborations, and other alliances.

Policy environment. Social workers in policy practice intervene to influence policy outcomes through advocacy, political action, and serving in policy-making roles. They persuade policymakers through lobbying, galvanize public support or opposition through constituent education and mobilization, and engage in electoral politics. Some shape policy directly by occupying policy-making roles at the local, state, and national levels. Others focus on

electoral politics, engaging in both partisan and nonpartisan political activity. Policy practitioners work in a variety of venues including legislative offices; local, state, and federal agencies; think tanks; lobbying firms; policy research and analysis organizations, community-based social service agencies; professional associations; advocacy groups; and political campaigns.

MACRO SOCIAL WORKERS USE A VARIETY OF STRATEGIES AND TACTICS TO ACHIEVE GOALS SPECIFIC TO THEIR PRACTICE ENVIRONMENTS

Administration and management. Practitioners work within organizational systems to persuade decision makers, boards of directors, and funders to provide programs and services that meet the needs of the services users, especially the most vulnerable and oppressed. Social workers in administration and management operate within the four domains of executive leadership, resource management, strategic management, and interorganizational or community collaboration.

- **Executive leadership:** Social workers in administration and management will use interpersonal skills that are necessary to motivate others to communicate the organizational mission and vision at all levels of management. Specifically, the skills of analytical and critical thinking, professional behavior, maintaining stakeholder relationships, communication, cross-cultural understanding, advocacy for social justice, and innovative change are used within and between organizations to achieve the organizational missions and goals.
- **Resource management:** Social workers in administration and management have the intellectual skills that provide for a clear perspective on the organization in its environment and are essential to possessing the capacity to think and act strategically. These skills are in the areas of effective talent management, managing and overseeing the budget and other financial resources, and ensuring transparency, protection, and accountability, including information technology.
- **Strategic management:** Social workers in administration and management have technical skills that are essential to managing

organizational function in the areas of fundraising, marketing and public relations, design and development of effective organizational and interorganizational programs, managing risk and legal affairs, and ensuring strategic planning for strategic action.

- Community collaboration: Social workers in administration and management build relationships and collaborate with complementary agencies, institutions, businesses, and other community group to enhance program resources and improve services. Social workers identify opportunities for partnerships that promote the achievement of the organizational mission and manage policy advocacy coalitions and other alliances dedicated to issues of social justice and client well-being.

Community practitioners. These social workers address geographic, identity, cultural, faith or spiritual, mutual interest, and organizational or associational communities to engage and mobilize constituencies and stakeholders and to persuade public, organizational, and local community decision makers to provide funds, resources, and services to the community to best address community-identified needs and issues, especially with those who are oppressed, vulnerable, and at risk. Community practice social work includes strategies of community organizing, planning, development, capacity building, and social action and change.

- Community organizing: Social workers in community practice educate, engage, and mobilize community constituents and stakeholders to address community-identified needs and issues. In mobilizing community constituencies and stakeholders, these social workers help to foster collective power that can be used to engage or persuade external stakeholders and decision makers to address community needs and issues and to organize grassroots community members and stakeholders to sustain a mobilized community constituency toward its goals.
- Community planning: Social workers in community practice partner with community constituents and stakeholders to assess community needs and issues and the target systems to respond to those needs

and issues; identify community assets, capacities, and allies; and develop intervention plans (goals and objectives) toward addressing community needs and issues.

- **Community development:** Social workers in community practice work to engage community constituencies and stakeholders around common interests, needs, and issues; build community consensus using collaboration and coalition tactics to find common ground for (re)developing and revitalizing a locality and its assets (e.g., housing, commercial business, social service organizations, and programs); and use community planning tactics to prioritize and undertake efforts to improve a locality, develop social or community programs, or establish and maintain community-based organizations.
- **Community capacity building:** Social workers in community practice recognize the importance of building human and social capital in ways that strengthen intracommunity bonds and bridge intercommunity relations. They increase the capacity of community constituencies and stakeholders to build and sustain skilled community-based leadership, promote and train grassroots organizers; establish and maintain organizations to sustain community efforts; and foster and support partnerships, collaborations, coalitions, and other alliances to build intraorganizational and interorganizational power and influence.
- **Community change:** Social workers in community practice recognize that promoting community change requires persuasion at several levels: educating community constituencies, stakeholders, and decision makers about the nature and scope of needs and issues; campaigning to engage grassroots constituencies and stakeholders in sustained advocacy and lobbying on problems, positions, and solutions to decision makers; fostering and sustaining alliances and coalitions to enhance power and influence to promote needed change; and, as necessary and feasible, engaging in confrontation and conflict to oppose decisions and decision makers or advance collective interests when the stakes are significant or adverse to human rights and social, economic, or environmental justice.

Policy practitioners. These social workers use planned, strategic interventions—informed by a deep understanding of context and power dynamics—to persuade local, state, and national policymakers to initiate, adopt, and implement policies consistent with social work values and priorities. They work with decision makers, policymakers, thought leaders, community leaders, activists, grassroots organizations, and others to promote change that improves the lives of all people, especially vulnerable populations. They educate and mobilize members of the public to support policy goals and work collaboratively with colleagues within social work and across professional disciplines. Major domains of policy practice include policy analysis, policy development, policy advocacy, policy implementation, and electoral politics.

- **Policy analysis:** Social workers in policy practice use specific frameworks to examine existing policies and assess their intended and unintended consequences. They also identify the strengths and shortcomings of proposed policies and compare various policy options. Analyses may focus on the policy process; historical context; political ramifications; social, economic, and environmental impacts; implications for client rights, needs, benefits, and services; and consistency with social work values.
- **Policy development:** Social workers in policy practice identify social problems and propose policy responses. They use research evidence, practice knowledge, and client perspectives and experiences to develop solutions that are intended to result in an improved quality of life and that demonstrate consistency with core social work principles. They consider the political landscape and likelihood of enactment as well as implementation requirements. They collaborate with others in the policy environment to draft legislation, develop fiscal impact statements, and educate members of the legislative and executive branches about prospective policy solutions.
- **Policy advocacy:** Social workers in policy practice use ethical, collaborative, and political strategies to advance policy proposals intended to have a positive impact on client populations, especially those who are vulnerable or oppressed. They create and implement strategic advocacy campaigns that may involve developing and

working in coalitions, testifying at legislative hearings, mobilizing constituent support, engaging in direct action, meeting with policymakers, and generating attention through media or social media. They translate research findings for consumption by policymakers and the public, craft messages appropriate to key audiences, and develop and deliver cogent and persuasive arguments.

- **Policy implementation:** Social workers in policy practice write regulations that operationalize enacted legislation, specifying how to translate laws and other policies into practice at the agency and service delivery levels. Social workers monitor the implementation process to ensure that it occurs as intended. They also engage in advocacy to enforce existing legislation designed to protect human rights and provide opportunities and supports to vulnerable populations.
- **Electoral politics:** Social workers in policy practice engage in voter education, engagement, and mobilization to maximize participation in the democratic process. They recognize that political action is essential to self-efficacy and community health and has far-reaching consequences for social policy. They lead and participate in electoral campaigns and run for and hold political office.

MACRO SOCIAL WORK PRACTITIONERS IDENTIFY AND SEEK A VARIETY OF OUTCOMES

Administration and management practice. Social workers in administration and management strive to align program services with organizational mission by maintaining currency in funding that supports the services for the populations being served, particularly vulnerable individuals, marginalized groups, and oppressed populations.

Community practice. Social workers in community practice seek outcomes that improve community well-being; address oppression, discrimination, and racism; are culturally grounded; and consider the historical context and evolving dynamic shifts in the nature of communities. These outcomes include the following:

- an engaged community mobilized for collective power and action; greater awareness of community needs and issues for actions that advance solutions to address those needs and issues;
- formal community plans and agendas that ensure community participation and action;
- stronger relationships and bonds within the community that help bridge relationships outside the community;
- skilled community-based leadership and effective organizations to implement community plans and sustain community action; and
- revitalized and new local communities, programs, and assets (e.g., parks, business, housing, community services).

Policy practice. Social workers in policy practice use the policy and political processes to dismantle oppressive structures, achieve systemic reforms, create service improvements that advance and protect the physical and social environment and the rights and well-being of marginalized populations; implement strategies that result in a more engaged public and in better educated policymakers who understand the priorities of low-income and vulnerable constituents; and appreciate the research evidence and practice wisdom that social workers bring to the table.

CORE DOCUMENTS, REFERENCES, AND RESOURCES

The following is a selected list of references and resources that are basic to one or all of the macro practice focus areas.

General Information on Social Work Competencies

THE GRAND CHALLENGES FOR SOCIAL WORK

American Academy of Social Work and Social Welfare. (n.d.). Grand Challenges Initiatives. Retrieved from <http://aaswsw.org/grand-challenges-initiative/>

THE NETWORK FOR SOCIAL WORK MANAGEMENT COMPETENCIES

Network for Social Work Management. (n.d.). *Competencies*. Retrieved from <https://socialworkmanager.org/competencies/>

ACOSA COMPETENCIES

Gamble, D. N., & Soska, T. M. (2013). Macro practice competencies. *The Encyclopedia of Social Work*. doi:10.1093/acrefore/9780199975839.013.976

ROTHMAN REPORT

Rothman, J. (2013, June). Education for macro intervention: A survey of problems and prospects. *Journal of Community Practice*, 21(3). Retrieved from <http://www.acosa.org/joomla/pdf/RothmanReportRevisedJune2013.pdf>

MIZRAHI AND ROTHMAN REPORT

Mizrahi, T., & Rothman, J. (2014) Balancing micro and macro practice: A challenge for social work. *Social Work*, 59(1), 91-93.

Codes of Ethics

NATIONAL ASSOCIATION OF SOCIAL WORKERS CODE OF ETHICS

National Association of Social Workers. (n.d.). Code of ethics. Retrieved from <https://www.socialworkers.org/About/Ethics/Code-of-Ethics/Code-of-Ethics-English>

INTERNATIONAL FEDERATION OF SOCIAL WORKERS CODE OF ETHICS

International Federation of Social Workers. (n.d.). Statement of ethical principles. Retrieved from <http://ifsw.org/policies/statement-of-ethical-principles/>

Community Resources

THE HANDBOOK OF COMMUNITY PRACTICE

Weil, M., Reisch, M., & Ohmer, M. L. (2013). *The handbook of community practice* (2nd ed.). Thousand Oaks, CA: SAGE.

INDIGENOUS AND TRIBAL SOCIAL WORK EDUCATORS ASSOCIATION

<https://www.cswe.org/getattachment/Centers-Initiatives/Scholarships-and-Fellowships/Scholars-Program/Past-CSWE-Scholars/10-TaskForceonNativeAmericansinSocialWorkEducation.pdf.aspx>

COMMUNITY TOOLBOX

The University of Kansas. (n.d.). Community tool box. Retrieved from <https://ctb.ku.edu/en>

Macro Social Work Practice Journals

JOURNAL OF COMMUNITY PRACTICE

<https://www.tandfonline.com/loi/wcom20>

HUMAN SERVICE ORGANIZATIONS (formerly ADMINISTRATION IN SOCIAL WORK)

<https://www.tandfonline.com/loi/wasw21>

JOURNAL OF POLICY PRACTICE

<https://www.tandfonline.com/loi/wjpp20>

Macro Social Work Professional Organizations

NETWORK FOR SOCIAL WORK MANAGEMENT (NSWM)

<https://socialworkmanager.org/>

ASSOCIATION FOR COMMUNITY ORGANIZATION AND SOCIAL ADMINISTRATION (ACOSA)

<http://www.acosa.org/joomla/>

INFLUENCING SOCIAL POLICY (ISP)

<http://influencingsocialpolicy.org/>

Macro Social Work Textbooks

Burghardt, S. (2014). *Macro practice in social work for the 21st century: Bridging the macro-micro divide* (2nd ed.). Los Angeles, CA: SAGE.

Netting, E. F., Kettner, P. M., McMurtry, S. L., & Thomas, M. L. (2017). *Social work macro practice* (6th ed.). Boston, MA: Pearson.

Reisch, M. (2018). *Macro social work practice: Working for change in a multi-cultural society*. San Diego, CA: Cognella Academic Publishing.

Social Work Practice, Policy, and Social Justice

Bailey, D., & Emmerson, M. (2016). The horse and the herd: Steadying the shift between micro and macro-direct social work practice. *The Pennsylvania Social Worker*, 37(2).

Bailey, D., & Emmerson, M. (Guest Eds.). (2018). Interconnections of micro and macro practice: Sharing experiences of the real world [Special Issue]. *Reflections: Narratives of Professional Helping*, 24(1), 1-167. Retrieved from <https://www.reflectionsnarrativesofprofessionalhelping.org/index.php/Reflections/issue/view/123>

Reisch, M. (2016). *Social policy and social justice* (2nd ed.). San Diego, CA: Cognella Academic Publishing.

Social Work Speaks. (2017). *National Association of Social Workers policy statements 2018-2020* (11th ed.). Washington, DC: NASW Press. Retrieved from <https://www.naswpress.org/publications/Profession/social-work-speaks-1.html>



Competency 1

Demonstrate Ethical and Professional Behavior

SPECIALIZED PRACTICE COMPETENCY DESCRIPTION

Macro social workers demonstrate the capacity, integrity, and commitment to act in an ethical manner that promotes inclusive participation in decision making, public policy, and community building. They ensure that practice in complex systems respects every individual's and community's right to human dignity and worth by opposing sources and structures of racism and other forms of oppression. Macro practitioners are facilitative leaders and organizers across all realms of practice and maintain a commitment to a vision and mission that support the collective process of social change. To ensure ethical practice with communities, with organizations, and in the policy arena, these social workers use self-reflection, self-regulation, supervision, consultation, and lifelong learning to address how their attitudes and biases influence their personal and professional identity, values, and behaviors. Social workers in macro practice represent the profession's values in interactions with clients, interprofessional colleagues, policymakers, and community stakeholders. They understand and promote organizational, community, and individual rights regarding policy, political activity, and other forms of social action. Macro practitioners recognize ethical issues in practice and distinguish between decision-making frameworks to navigate ethical dilemmas between their personal values, their identity, values of the profession, and the values, interests, and rights of individuals, families, groups, organizations, and communities.

COMPETENCY BEHAVIORS

Social workers in macro practice

- apply an anti-oppression framework integrating the principles included in the NASW and International Federation of Social Workers (IFSW) ethical codes, evidence-based knowledge, and relevant legal and policy-related information;
- apply aspects of cultural humility into ethical decision making, demonstrating recognition of and ability to use the principles as related to NASW and IFSW codes of ethics;
- critically apply ethical decision-making frameworks that reflect social work values and the basic needs and rights of vulnerable, marginalized, and disadvantaged communities;
- identify and promote organizational and community vision, mission, goals, objectives, and values in the dynamic and evolving contexts of macro practice;
- advance internal and external policies for community change that reflect social work values, challenge discrimination and social inequities, and prioritize the voices of affected populations;
- use self-evaluation and reflection to critically navigate competing personal and professional values, as well as trade-offs involved in making strategic decisions;
- demonstrate proficiency in regulations and laws that govern practice within nonprofit and public agencies and community settings;
- model appropriate professional use of self in the different social work roles required in professional macro environments;
- demonstrate an understanding of the significance of social work supervision as an accountability mechanism in supporting ethical and professional social work practice; and
- recognize the complexities and dilemmas that may arise in working with multiple client groups and constituencies.

CURRICULAR RESOURCES MAPPED TO COMPETENCY DIMENSIONS

Readings

Resource	Competency Dimension
ARTICLES	
Bailey, D., Bonner, K. B., Uhly, K., & Wilen, J. S. (In press). Leadership, Foundations of. Encyclopedia of Social Work. (http://www.socialwork.oxfordre.com).	Values Cognitive and Affective Processes
Bass, B. M., & Steidlmeier, P. (1999). Ethics, character, and authentic transformational leadership behavior. <i>Leadership Quarterly</i> , 10(2), 181–217.	Values Cognitive and Affective Processes
Edwards, Richard L. (1987). The Competing Values Approach as an Integrating Framework for the Management Curriculum. <i>Administration in Social Work</i> , 11(1), 1-13.	Values Cognitive and Affective Processes
Gibelman, M. (2005). Social workers for rent: The contingency human services labor force. <i>Families in Society</i> , 86(4), 457–469.	Values Cognitive and Affective Processes
Hair, H. J. (2015). Supervision conversations about social justice and social work practice. <i>Journal of Social Work</i> , 15(4), 349–370. doi:10.1177/1468017314539082	Values Cognitive and Affective Processes
Hardina, D. (2004). Guidelines for ethical practice in community organization. <i>Social Work</i> , 49(4), 595–604.	Values Cognitive and Affective Processes
Hardina, D., Jendian, M. A., & White, C. G. (2015). Tactical decision-making: Community organizers describe ethical considerations in social action campaigns. <i>Journal of Sociology and Social Welfare</i> , 42(1), 73–94.	Values Cognitive and Affective Processes

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Readings (continued)

Resource	Competency Dimension
Kimberlin, S. E. (2010). Advocacy by nonprofits: Roles and practices of core advocacy organizations and direct service agencies, <i>Journal of Policy Practice</i> , 9(3-4), 164-182.	Values Cognitive and Affective Processes
LeRoux, K. (2011). Examining implementation of the National Voter Registration Act by nonprofit organizations: An institutional explanation. <i>The Policy Studies Journal</i> , 39(4), 565-589.	Values Cognitive and Affective Processes
Mosley, J. E. (2013). Recognizing new opportunities: Conceptualizing policy advocacy in everyday organizational practice. <i>Social Work</i> , 58(3), 231-239.	Values Cognitive and Affective Processes
Reisch, M., & Lowe, J. (2000). "Of means and ends" revisited: Teaching ethical community organizing in an unethical society. <i>Journal of Community Practice</i> , 7(1), 19-38.	Values Cognitive and Affective Processes
Reisch, M., & Taylor, C. L. (1983). Ethical guidelines for cutback management: A preliminary approach. <i>Administration in Social Work</i> , 7(3/4), 59-72.	Values Cognitive and Affective Processes
BOOK CHAPTERS	
Cummins, L. K., Byers, K. V., & Pedrick, L. (2011). Ethics in policy practice In <i>Policy practice for social workers: New strategies for a new era</i> (Chapter 5). Boston, MA: Allyn & Bacon.	Values Cognitive and Affective Processes
Jansson, B. (2018). Articulating four rationales for participating in policy advocacy. In <i>Becoming an effective policy advocate: From policy practice to social justice</i> (Chapter 2, 8th ed.). Belmont, CA: Belmont/ Brooks-Cole.	Values Cognitive and Affective Processes
Lane, S. R., & Pritzker, S. (2018). Budgeting and allocating resources. In <i>Political social work: Using power to create social change</i> (Chapter 12, Section 4). New York, NY: Springer International Publishing.	Values Cognitive and Affective Processes

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Readings (continued)

Resource	Competency Dimension
Lane, S. R., & Pritzker, S. (2018). Making ethical decisions in political social work In <i>Political social work: Using power to create social change</i> (Chapter 14). New York, NY: Springer International Publishing.	Values Cognitive and Affective Processes
Lewis, C. E. (2012). From the tough streets of East New York to Capitol Hill. In E. F. Hoffler & E. J. Clark (Eds.), <i>Social work matters</i> (pp. 46–50). Washington, DC: NASW Press.	Values Cognitive and Affective Processes
Minkler, M., Pies, C., & Hyde, C. (2012). Ethical issues in community organizing and capacity building. In M. Minkler (Ed.), <i>Community organizing and community building for health and welfare</i> (Chapter 7). New Brunswick, NJ: Rutgers University Press.	Values Cognitive and Affective Processes
Mizrahi, T. (2012). How I became a community organizer as a casework social work student. In E. F. Hoffler & E. J. Clark (Eds.), <i>Social work matters</i> (pp. 83–90). Washington, DC: NASW Press.	Values Cognitive and Affective Processes
BOOKS	
Banks, S. (2014). <i>Ethics. Critical and radical debates in social work</i> (I. Ferguson & M. Lavalette, Eds.). Bristol, UK: Policy Press.	Values Cognitive and Affective Processes
Bolman, L. G., & Deal, T. E. (2017) <i>Reframing organizations</i> (6th ed.). Hoboken, NJ: Jossey-Bass.	Values Cognitive and Affective Processes
Burghardt, S., & Tolliver, W. (2010). <i>Stories of transformative leadership in the human services: Why the glass is always full</i> . Los Angeles, CA: Sage.	Values Cognitive and Affective Processes
Cameron, K., Quinn, R., Degraff, J., & Thakor, A. (2014). <i>Competing values leadership</i> (2nd ed.). Northampton, MA: Edward Elgar Publishing.	Values Cognitive and Affective Processes

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Readings (continued)

Resource	Competency Dimension
Dolgoff, R., Harrington, D., & Loewenberg, F. (2012). <i>Ethical decisions for social work practice</i> (9th ed.). Brooks/Cole Empowerment Series. Stamford, CT: Cengage.	Values Cognitive and Affective Processes

Media

Resource	Competency Dimension
Alliance for Justice: www.bolderadvocacy.org	Knowledge
Community Tool Box: http://ctb.ku.edu/	Knowledge Skills
IFSW Ethical Principles: http://ifsw.org/policies/effective-and-ethical-working-environments-for-social-work-the-responsibilities-of-employers-of-social-workers-3/	Knowledge Values
Internal Revenue Service (2017). "Direct" and "grass roots" lobbying defined. https://www.irs.gov/charities-non-profits/direct-and-grass-roots-lobbying-defined .	Knowledge
NASW ethical principles using technology: https://www.socialworkers.org/includes/newIncludes/homepage/PRA-BRO-33617.TechStandards_FINAL_POSTING.pdf	Knowledge Values
U.S. Office of Special Counsel. (n.d.). <i>How does the Hatch Act affect me?</i> Available at: https://osc.gov/pages/hatchact-affectsme.aspx	Knowledge
2018 NASW Code of Ethics: https://www.socialworkers.org/About/Ethics/Code-of-Ethics/Code-of-Ethics-English	Knowledge Values
<i>inSocialWork</i> podcast series Episode 181: Chad Allee: Leadership in Social Work http://www.insocialwork.org/reviews.asp?ep=181 The idea of leadership is finding its way more often into the discussions of professional social work, but what is meant by "leadership"? And what does being a "leader" mean? In this episode, Chad Allee describes what leadership is, argues for the importance of leadership in social work, and points to the need to cultivate more social work leaders.	Knowledge Values Cognitive and Affective Processes

(continued)

Media (continued)

Resource	Competency Dimension
<p>CUNY Workforce Development Initiative of the Silberman School of Social Work at Hunter College.</p> <p><i>Taking action, making change.</i> Available at: https://www.youtube.com/watch?v=fU15CAn5zMo</p>	Video

In-Class Exercises

Resource	Competency Dimension
<p>Case Vignette: College Counseling Center</p> <p>Discusses the ethics surrounding keeping a program versus changing it to address trends.</p> <p>See Appendix 1A.</p>	Knowledge Values Skills
<p>Small Groups: Administrative Dilemma</p> <p>Four different scenarios where ethical considerations are discussed, based on role and position with the organization.</p> <p>See Appendix 1B.</p>	Values Cognitive and Affective Processes
<p>Small Groups: Supervision in the Organizational Context</p> <p>Supervision is an interaction process in which the worker plays an active part in influencing the behavior of the supervisor and the outcome of the process. In preparation for class discussion, students will reflect on the questions that refer to the Schulman text, as well as the competing values framework (CVF) and <i>Stories of Transformative Leadership</i>. You should be prepared to share your answers in small groups and to the class.</p> <p>See Appendix 1C.</p>	Knowledge
<p>Community Practice Ethics Case Studies</p> <p>The case of the crèche</p> <p>This case study examines the clash of at least two ethical principles in a community practice context. How does a macro practice social worker practice ethically when the goals of a community violate basic social work values?</p> <p>Who gets funding</p> <p>This case study presents a dilemma involving competing values that highlight issues of race, class, and gender in a competitive funding environment. How can disadvantaged agencies compete with those with better access to resources needed to secure funding?</p> <p>See Appendix 1D.</p>	Values Cognitive and Affective Processes

(continued)

In-Class Exercises (continued)

Resource	Competency Dimension
<p>Reflecting on Ethical Dilemmas in Policy Practice</p> <p>With a small group of your peers, identify at least three specific ethical dilemmas that policy practitioners might face in their practice. Discuss the personal values, organizational values, and professional values that might be in conflict for each dilemma. Then, as a group, identify relevant core social work values or ethical standards and discuss how each might help you approach the challenge.</p>	<p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Political Engagement, Laws, and Ethics</p> <ol style="list-style-type: none"> In a small group, discuss with your peers any messages you have received about the political activity permissible for public and nonprofit employees in your state. Then, as a group, look up each of the following (or assign a different question to each group): <ul style="list-style-type: none"> The laws that govern political activity of state employees in your state The laws that govern political activity of nonprofit employees The laws that govern lobbying in your state What is allowed? What isn't? How do the actual laws surrounding political activity compare to the messages you have received? 	<p>Knowledge</p>
<p>Values and Politics</p> <p>Chauncey Alexander, a former executive director of NASW, once wrote, "There is an organic relationship between professional function and political responsibility." What do you think he means? Share examples of how this idea could, or has been, operationalized.</p>	<p>Values</p>

Assignments

Resource	Competency Dimension
<p>Identifying Your Leadership and Supervisory Style</p> <p>A self-inventory of personal leadership styles and how they relate to values in decision making.</p> <p>See Appendix 1E.</p>	<p>Values</p>
<p>Case Study: Organizational Culture</p> <p>Focuses on the competing values within organizations.</p> <p>See Appendix 1F.</p>	<p>Values</p> <p>Cognitive and Affective Processes</p>

(continued)

Assignments (continued)

Resource	Competency Dimension
<p>Reflecting on Advocacy</p> <p>Students write an essay, including self-reflection, based on a book about an activist.</p> <p>See Appendix 1G.</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>
<p>Advocate's Autobiography</p> <p>Students reflect on the role of advocacy in their own lives.</p> <p>See Appendix 1H.</p>	<p>Values</p> <p>Cognitive and Affective Processes</p>
<p>Values Inventory for Policy Practice</p> <p>Students identify their positions on a series of policy issues (drawn from <i>Social Work Speaks</i>). They then compare their personal positions to those of NASW and write a critical reflection.</p> <p>See Appendix 1I.</p>	<p>Knowledge</p> <p>Values</p>

Activities

Resource	Competency Dimension
<p>Exploring Ethical Dilemmas From Field Internship</p> <p>Students analyze an ethical dilemma that they have encountered in their macro field placement.</p> <p>See Appendix 1J.</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>

APPENDIX 1A: CASE VIGNETTE: COLLEGE COUNSELING CENTER

The counseling center at Hillsboro University was a model of excellence in its early years. It was one of the few such centers offering long-term therapy for students who desired high degrees of self-awareness. Only in cases of serious psychiatric crisis were students referred to outside agencies. The director of the counseling center prided himself on the fact that, with the highly qualified and credentialed staff of counselors he had hired, Hillsboro students could have all their mental health needs met within the boundaries of their peaceful, tree-lined campus.

In the past several years, however, changes have begun to take place. The number of clients presenting themselves for services at the counseling center has dropped so drastically that the center's staff—all licensed psychologists or clinical social workers—had time to spare. Waiting lists for appointments had never been long, but now the reception area was ominously quiet. This situation was surprising because any indicator that could possibly measure aspects of mental health among students showed that problems did exist. Disciplinary measures for drug and alcohol abuse had increased, the dropout rate at final exam time was as high as ever, and complaints from local police officers and residents showed that students were, indeed, “letting off steam” in the late hours.

Considering the situation, the university's vice president for student affairs, Mary Belmont, initiated a series of discussions with Simon Young, the counseling center director. Vice President Belmont's contention was that the counseling center no longer met the needs of Hillsboro students.

She pointed out, “We simply do not have the kind of students we used to. The students we have now are not here to find themselves. They are not interested in spending long hours delving into their reason for being. These young people are practical. They want help with immediate decisions, help with time management, and help in developing methods for dealing with stress. They are not going to spend long periods of time in a therapist's office. Something has to change.”

“But that is exactly my point,” Young responded. “These students do have problems, and they are not dealing with them. They think it is not important

to delve into their reasons for being, but it is important. They think they can solve their problems with a quick how-to session, but they cannot. A good proportion of these students do need therapy—at least as many as needed it 5 years ago. What we have to do is get those dormitory house parents, student advisors, and professors to start referring students to the center so they can get what they need.”

“We are not going to do that, Simon. We do not know what these students need unless we ask them. What I would like to suggest is that we involve the members of your counseling staff, and then some other members of the university community, and try to implement some planning about what steps should be taken. We cannot afford to pay high salaries for clinicians to be sitting in their offices waiting for someone to remember they are there.”

“Now I understand what you are really saying, Mary. It is getting near budget time again. You are not concerned about what these students need. You are concerned about the money being spent on the counseling center, and you are trying to cut costs. I would not mind it so much if you would just be straight about it. Just remember this: When you hired me as counseling center director, you told me I would have a free hand to build a high-quality center. You said that was what you wanted, and that is what you got. If you do not want that any more, just tell me.”

“Simon, I do not want that anymore.”

“Then you will have my resignation on your desk in the morning. I do not know whether the staff will join me or not.”

“Simon, just wait a minute. You had some ideas about what kind of things you wanted to accomplish with young people. You had some goals in mind, and for a long time you met them. Now times are changing. Why is it so impossible to consider using different methods to reach students? Why not use decision-making kits that students can use on their own? Why not go into the dorms with life planning workshops? Why not train peer counselors to work with the students who live off campus?”

“Because, Mary, what you are talking about are a bunch of fads. They may save money on professional salaries, but in no way do they accomplish the same ends. These are shortcuts that do not reach the places we are trying to go. What good are they? Maybe I was hasty in talking about my resignation,

but I have to tell you that I am going to support my staff, no matter what it takes. I will not have you firing experienced therapists left and right just to bring in a bunch of kids or pieces of paper that you think can fix people up.”

“I am not suggesting that. What I am suggesting is that the plans you made when you started this counseling center were solid, and your methods worked. But you cannot stay married to your methods.”

“These are not my methods, which I just invented. These are the methods that clinicians learn as part of their professional training. They fit accepted professional standards.”

“Look, Simon, I understand that. Just give me a commitment that you will try to explore this further. We will not take any action until we have thought it through.”

- 1) What do you consider to be the most likely outcome of the conflict between Mary Belmont and Simon Young?
- 2) What are the real issues at stake?
- 3) Do you see one of these two differing viewpoints as being essentially correct in terms of your own values? Would you be able to present an argument justifying the opposite viewpoint?
- 4) If you were to be involved in a planning process like the one suggested by Mary Belmont, what steps would you follow? Who should be involved in the planning process?
- 5) Is there any way that earlier planning procedures might have prevented the conflict described in this case?
- 6) To what degree can the planning process be considered rational?

APPENDIX 1B:

SMALL GROUP DISCUSSION: ADMINISTRATIVE DILEMMA

Developing the acumen to meet challenges ethically and swiftly is essential to accountability and performance realms of administrative practice, and more importantly to the well-being of those for whom the services are intended. Relying on course content to date, including readings and classroom

discussion, you and your groupmates will discuss the following administrative dilemmas. Using the Ethical Assessment Screen (Dolgoff et al., 2012) the group will assess the available alternatives to these dilemmas. You will choose a spokesperson for your group who will present your answers and rationale to the class.

Ethical Assessment Screen (see Dolgoff et al., 2012, Figure 4.2, p. 74).

Identify the relevant professional values and ethics, your own relevant values, and any societal values relevant to the ethical decision to be made in relation to this ethical dilemma.

- 1) What can you do to minimize the conflicts between personal, societal, and professional values?
- 2) Identify ethical alternatives you may take.
- 3) Which of the ethical alternatives will minimize conflicts between your client's, others', and society's rights and protect to the greatest extent your client's and others' rights and welfare and society's rights and interests?
- 4) Which alternative action will be most efficient, effective, and ethical and result in your doing the least harm possible?
- 5) Have you considered and weighed both short- and long-term ethical consequences?
- 6) Final check: Is the planned action impartial, generalizable, and justifiable?

Administrative Dilemma 1

You are a supervisor at an agency that has well-known and well-loved vision and mission statements. In fact, you helped develop these beloved vision and mission statements, guided by your careful consideration of the community need and appropriate practice theories. Over time, though, the vision and mission statements have ceased to reflect the practices your agency is expected to follow and the application of practice theories you envisioned. You are aware of this contradiction. However, as a supervisor your responsibility is

to see that the work gets done and the agency receives reimbursement for services and meets its budget.

Administrative Dilemma 2

You are an executive director of an agency and have become aware that a well-loved, well-admired, and well-performing employee has been accused of violating several agency policies. For each of the following violations, answer the exercise questions.

ACCUSED VIOLATIONS OF POLICY

- excessive absence from work
- breaking confidentiality

Administrative Dilemma 3

You work for a large mental health agency and are the manager for an adult case management team of five social workers. During group supervision, one of the case managers, Karl, shows up late, and you notice uncomfortable body language among the other workers. This doesn't strike you as odd since Karl has never really seemed to "fit in" with the others. After the meeting, two of the workers ask for a confidential meeting with you and state that Karl has violated the following policies:

- drinking during work hours
- inappropriate expenditure of funds

Administrative Dilemma 4

You work for an agency that serves youth and families. The agency recently received funding to hire two social workers for a new project. One of your colleagues, Maura, whom you admire and have an excellent working relationship with, was named the manager of this project and given responsibility to conduct a search and hire these two new social workers, who will report to her directly. Two months after the new social workers are hired you see Maura and one of them sitting together at a bar after work. They are holding hands from across the table. You later hear office gossip that Maura hired an ex-girlfriend.

APPENDIX 1C: SUPERVISION IN THE ORGANIZATIONAL CONTEXT

(Source: Shulman, L. (2010). *Interactional supervision* (3rd ed.). Silver Spring, MD: National Association of Social Workers, p. 12)

- 1) Supervision is an interaction process in which the worker plays an active part in influencing the behavior of the supervisor and the outcome of the process.
- 2) There are common or constant elements to supervision across settings, disciplines, populations, and problems.
- 3) There are universal dynamics and skills that apply to different modes of interaction (for example, individual and group supervision).
- 4) There are parallels between supervision and other helping relationships.
- 5) The supervisor-supervisee working relationship is the medium through which a supervisor can partially influence the outcomes of practice.

The supervisor is responsible and accountable to organizational leadership, the supervisee, the clients of the organization, and the community. Social work supervisors' oversight ensures that high-quality services are delivered ethically and in an equitable manner that promotes social inclusion. In this role, the social work supervisor is also responsible for training the next generation of supervisors through mentoring and role modeling.

In preparation for class discussion, reflect on the following questions referring to the Schulman text, as well as CVF and *Stories of Transformative Leadership*. Be prepared to share your answers in small groups and with the class.

- 1) How are social work supervision and management roles different, and how are they similar? What are the goals and values of each?
- 2) What strengths does the social work supervisory role bring to the organization as opposed to management or other organizational leaders? What organizational values do they each address (refer to CVF)? What are some of the challenges associated with each role?

- 3) How do these roles complement one another to achieve a balance and stability within the organization?
- 4) What skills contribute to the effectiveness of each of these roles?

APPENDIX 1D: COMMUNITY PRACTICE ETHICS CASE STUDIES

The Case of the Crèche

Frank is an advanced community organizing student at a grassroots community development agency, which also lends support to local neighborhood organizing efforts. As a board member of the agency, you are his field instructor. Frank also has a task instructor, who is a seasoned organizer and member of the community. The community is largely white, working-class, and Catholic.

It is October, and Frank attends his first neighborhood organizing meeting. Neighbors are irate that the city will not allow them to put a nativity scene in the public square in the center of town (for the first time in 20 years, after a court ruling). One particularly angry resident states that this has occurred because “the Jews and other nonbelievers have taken over the city.” Another states, “The elimination of the nativity scene from public land is an attack on Christianity. We are being persecuted.” These and similar statements receive widespread support by those in attendance.

The group spends considerable time discussing possible options and seems to favor a protest strategy designed to cause “mass arrests” for civil disobedience. The plan is to have community members and their children set up the nativity scene at the usual site; adults and teenagers will chain themselves to it.

Frank, who is also a religious person, is confused and concerned. He isn’t sure that this is a good strategy, and he’s upset by some of the statements that he views as prejudicial. He also knows that as a newcomer, he needs to be careful and respectful. And he believes in the social work values of self-determination and empowerment. The group wants to know whether “he’s with them to fight this discrimination.” His initial response is that he’s here to understand and learn. In a bit of a panic, Frank brings all of this to his supervisors.

Who Gets Funding?

The Situation: Charlotte, with an MSW, works as a program manager at Family Functions, a state-supported agency (90% of its budget comes from state revenues) that oversees programs and resources statewide for families in need, with the goal of preventing child abuse and neglect. Charlotte oversees six parenting education programs for teen parents that are offered at various community agencies across the state. Funding of these parenting programs is done through a competitive grant process; the state tasks Family Functions with selecting the programs, monitoring the programs for quality assurance and effective implementation, ensuring fiscal responsibility, and other general management issues. Charlotte is Puerto Rican, comes from a low-income background, and is intimately connected to the programs, having benefited from them when she was a teen parent.

Family Functions has recently issued a new request for responses (RFR) for proposals for the teen parenting programs. Any eligible agency can submit a proposal, and there is no guarantee that currently funded programs will be selected for grant renewal. The RFR provides, in meticulous detail, the guidelines for what proposals should include and the timeline for applications to be submitted. This information is sent to each agency across the state that is eligible, and it is also posted on the Family Functions website. In addition, Family Functions hosts a bidder's conference, open to all interested agencies, where Charlotte goes over point-by-point, section-by-section, the particulars of the guidelines and what is expected in the proposal. Applicants also have the opportunity to ask questions or discuss ideas for feedback during this conference. After proposals have been submitted, a review committee is asked to score the proposals and attend a meeting to discuss their recommendations, come up with a final score, and come to consensus on whether to fund each of the proposals.

It has been a difficult year fiscally for the state, and Family Functions has been deeply affected by the current economic climate. On a number of occasions, they've had to lobby the legislature to retain their current operating budget and had to scale back supporting a number of worthwhile programs. One time, the agency was even threatened with being cut altogether. With this new RFR, only 6 of the 18 proposals submitted will receive funding. It is

therefore imperative that those chosen are able to carry out effective teen parenting programs, for their own livelihood and the livelihood of Family Functions as well.

In one proposal review session, the committee cannot reach consensus on two of the proposals. The first proposal is from an agency that is currently funded to offer the teen parent program. This agency provides services to teen parents in a coastal region of the state. This region is perceived by many to be very affluent, because of the large numbers of wealthy people who own summer homes or travel there during the months of May through August. However, the people who live there year-round are not well off financially, and during the colder months the region is quite destitute. The agency serves young white mothers, many of whom don't have a high school degree. This agency's proposal is by all accounts quite strong and complete. Charlotte knows that the teen parent program there is run well and has made a huge impact in bringing down the number of child abuse cases among teen parents. Charlotte also knows that they were able to secure a part-time grant writer pro bono to help them with this and other proposals.

The other proposal in contention is from an agency located in a large, multicultural city, one of the five largest cities in the state. This agency, which is not currently funded, wants to offer the program for their teen parents, composed largely of Latino and Black mothers, many of whom are of limited financial means and limited education. This agency's proposal is poorly written, it doesn't address a lot of the key questions asked for in the guidelines, and it is missing parts of the budget and other smaller items. However, two of the review committee members—one Latino and the other White, both women—are adamant that this community is more deserving (and in greater need) of the parent program than the coastal town.

Making a Decision: The committee is at an impasse. Charlotte, along with Family Functions senior staff—the executive director (a White woman with an MSW), the director of operations (a White man with an MSW), the director of programs (a White man), and the deputy director of programs (a Native American woman with a degree in nursing)—must choose one of the agencies to receive the final slot for funding. Both agencies in contention attended the bidder's conference.

What should Charlotte do? What are the competing values at stake here? What ethical arguments can be used to help frame the debate and arrive at a decision?

APPENDIX 1E: IDENTIFYING YOUR LEADERSHIP AND SUPERVISORY STYLE

Throughout this course many leadership roles have been examined, including those of supervisor, project or program manager, executive director, and many more. As advanced practice social workers many of you will be asked to take on any of these varying leadership roles during your professional career.

Using outside sources, self-reflection, and interviewing of a social work leader in the field, write a 5-page paper that identifies

- who you interviewed for the assignment and why (i.e., your interest in the leadership or supervisory roles they have held or currently hold, the leadership qualities you observed in them before the assignment, and whether your understanding of their role and qualities changed or stayed the same after the interview);
- questions you asked in the interview;
- the leadership and supervisory models you prefer;
- how you anticipate you will apply these models in your own social work practice in your role as supervisor, manager, or leader;
- self-reflection and assessment on why these models suit you, including any past experiences you have had as a supervisor, manager, or leader or as an employee or volunteer; and
- what you learned from the interview that you will or will not use in your own practice or that is similar to your preferred supervisory and leadership style.

APPENDIX 1F: CASE STUDY: ORGANIZATIONAL CULTURE

For this assignment, please refer to the story in Part I, “The Depletion of Value,” in the Burghart text (pp. 1–61).

Discussion

In the Edwards article (1987), the author describes a set of administrative roles that correspond to specific organizational needs and values and applies the framework to the field of social work. The author makes the point that each role has its own inherent set of behaviors, skills, formality, and level of authority. In Week 1, the assigned reading in the text *Competing Values Leadership* (2014) provided an extensive overview of this framework, its dimensions, a definition of value, and acknowledgment of the complex nature of organizations. Many leadership qualities and traits associated with the focus of each quadrant are implied throughout “The Depletion of Value.” For this discussion, begin considering the different ways leadership can be conceived of and to use the CVF to conduct an analysis of the child welfare organization presented in this story by answering the following questions.

- 1) Referring to the organization presented in Part 1, “The Depletion of Value,” what are some of the key elements that define the organizational culture? What role does the leadership team have in creating that culture?
- 2) This organization is facing external and internal challenges that require change and adaptation for sustainability. Using the CVF, provide your critical analysis of how the leaders are approaching these challenges and why these approaches are effective or ineffective. How do you define effective?
- 3) Referring to the CVF, in which quadrants does this organization demonstrate strength, and where is it most challenged?
- 4) Have you had experience working for a program or organization that operated in a similar way? If so, share what that experience was like and how it contributed to your ability to perform your job responsibilities. If you haven’t had an experience similar to this, what about this organizational culture and leadership would feel supportive to your work?

APPENDIX 1G: REFLECTING ON ADVOCACY

Students select and read one book from the following list about ordinary people or social activists who have engaged in policy advocacy:

- Lieberman, A. (2010). *Women in social work who have changed the world*. Chicago, IL: Lyceum Books, Inc.
- Loeb, P. (2010). *Soul of a citizen: Living with conviction in challenging times*. New York, NY: St. Martin's Griffin.
- Maathai, W. (2007). *Unbowed: A memoir*. New York, NY: Anchor/Random House.
- Dellums, R. (2000). *Lying down with the lions: A public life from the streets of Oakland to the halls of power*. Boston, MA: Beacon House
- Shilts, R. (1988). *The mayor of Castro Street: The life and times of Harvey Milk*. New York, NY: St. Martins Press.
- Knight, L. (2010). *Jane Addams: Spirit in action*. New York, NY: W. W. Norton.

Based on the book, students write a 6- to 8-page essay in which they select the main character (or, in the case of the Lieberman and Loeb books, at least four key characters in the book) and discuss the following:

- a. How do the characters engage in policy advocacy?
- b. What motivates the characters to do so?
- c. Why did the characters choose their selected tactics (specific methods of carrying out their advocacy)?
- d. What are the personal, community, and social impacts or consequences of their work?
- e. Did reading this book change your perspective concerning the role of policy advocacy in your life?
- f. How do you anticipate integrating policy advocacy into your professional social work practice?

APPENDIX 1H: ADVOCATE'S AUTOBIOGRAPHY

Students write a 4- to 5-page paper using the following questions:

- 1) What are your earliest memories of being involved in social action?
- 2) Are there specific people who have served as advocacy role models in your life? What have you learned from them?
- 3) How has your orientation toward advocacy changed throughout your life (issues, involvement)?
- 4) What has facilitated or limited your advocacy roles in the past?
- 5) How do your social identities (e.g., age, gender, race or ethnicity, sexual orientation, national origin, place of birth, religion) influence or play a role in your political involvement?
- 6) What skills, talents, and insights do you bring to advocacy that you believe will be assets to your work?
- 7) What are your greatest challenges or limitations as an advocate?
- 8) How do you approach advocacy differently now, as an aspiring social worker, compared to before your development of this professional identity?
- 9) How does advocacy fuel your fulfillment of the NASW Code of Ethics? What ethical concerns do you identify as you contemplate your macro social work practice?
- 10) Students may add additional material including photos, artistic reflections, or audiovisual representations of their personal and professional journeys as advocates.

APPENDIX 1I: VALUES INVENTORY FOR POLICY PRACTICE

An earlier version of this assignment appears in E. P. Congress, P. N. Black, & K. Strom-Gottfried, (2009), *Teaching social work values and ethics: A curriculum resource* (2nd ed.). Alexandria, VA: CSWE Press.

Instructions

- 1) Read each statement below. Indicate your personal agreement (+) or disagreement (-) in the space *to the left* of each statement. You may also strongly agree (++) or strongly disagree (--).
- 2) On a scale of 1–5, indicate how knowledgeable you feel about each issue (1 is *clueless*, 5 is *extremely well-versed*) in the column just to the right of each statement.
- 3) Once you have indicated your personal agreement or disagreement with each statement, your instructor will share NASW’s position on the issue. Use the far right-hand column to indicate whether your professional organization agrees (+) or disagrees (-) with each statement. Discuss, as a class, what social work value underlies each of these positions.
- 4) Finally, looking back at the completed inventory, compare your own personal opinions with those of the social work profession. Consider both the similarities and the differences. *Write a cogent, thoughtful 2- to 3-page reflection* that discusses (1) how the two compare, (2) your thoughts about why specific discrepancies might exist, (3) what the implications of the “match” between your values and the profession’s values might be, and (4) how you, as a social worker engaged in advocacy, would navigate any differences or conflicts between your personal values and those of the profession. Finally, how did you assess your level of knowledge on the various issues in the inventory? What conclusions can you draw from that?

1		Transgender and gender-nonconforming people should have access to public restrooms consistent with their gender identity.		
2		The Constitution should be amended to clarify that English is the official language of the United States.		
3		Grandparents and others who serve as foster parents for their own relatives should do so out of love, without financial assistance from the government.		
4		Affirmative action policies continue to be an important tool in preventing and eliminating discrimination.		

5		Law enforcement officers at all levels of government and in all jurisdictions should be required to use body-worn cameras.		
6		Congress should adopt a minimum wage that reflects the realities of the cost of living.		
7		HIV testing of pregnant women and their newborns should be conducted routinely, with or without consent, to prevent the spread of AIDS.		
8		Convicted felons should have their voting rights restored once they have completed their sentences.		
9		The death penalty is sometimes appropriate.		
10		The government should limit its support for sex education to "abstinence-only" programs.		
11		Older adults should be considered ineligible to serve as legal guardians for children.		
12		Federal funding should support research into the use of embryonic stem cells for prevention and cure of disease.		
13		Adolescents should be required to notify their parents before having an abortion.		
14		Social service professionals should be mandated to report unauthorized immigrants to federal authorities.		
15		Agencies should seek to place children for adoption in two-parent families before seeking placements with single adults.		
16		Women on welfare who continue to have children should be denied additional benefits.		
17		Social workers should oppose the legalization of "physician aid in dying" and other measures to hasten the end of life.		
18		All employers should be required to provide new parents with paid family leave.		
19		People should be permitted to register to vote on Election Day.		

20		High-quality early childhood education should be universally available.		
21		Businesses have a moral responsibility to embrace practices that protect the natural environment.		
22		Funding for domestic violence programs should support treatment for perpetrators as well as for survivors.		
23		Syringe exchange programs to prevent the spread of HIV should be illegal because they promote drug use and endanger communities.		
24		Juveniles who commit serious felonies should be tried and sentenced as adults.		
25		Prostitution should be decriminalized.		

APPENDIX 1J: EXPLORING ETHICAL DILEMMAS FROM FIELD INTERNSHIP

Students prepare a case study based on an ethical dilemma they have encountered in their macro practice field placement; it can focus on either a case with ethical implications or an analysis of ethical problems emerging from organizational functioning and operations or organizational policy.

- 1) The case study should cover the following:
 - a. Identify, define, and discuss the ethical dilemma from practice that will be used in the final paper.
 - b. Present a comprehensive description of the issue, explaining all relevant facts and explicitly stating the central ethical dilemmas.
 - c. Analyze the issue selected, from all sides of the issue. Discuss the values that conflict as part of the ethical dilemma: the opposing personal, professional, and agency values at play, why they conflict, and the parties involved.
 - d. Provide a synopsis of how the dilemma is influencing your professional development.

- e. Provide a preliminary literature review of articles that are helping you think through the issues, consisting of at least two annotated references.
- 2) Based on the case study, the final written assignment calls on the student to write a 10- to 12-page paper discussing the ethical dilemma faced in practice in greater depth and length. In addition, student will give a 10- to 15-minute oral presentation of the final paper in class. The purpose of this assignment is to give the student an opportunity to reflect on his or her journey through the social work program. Students are required to cover the following in their presentation and paper:
- a. Analyze the dilemma from the perspective of the NASW/IFSW codes.
 - b. Discuss the ethical dilemma in terms of its implications for:
 - i. Research: What potential research might flow from your observations and conclusions?
 - ii. Community and policy practice: What changes in professional practice might you offer based on your study?
 - iii. Social policy: What proposals for new social welfare policy or changes in existing policy might you recommend?
 - iv. Organizations and leadership.
 - c. Offer suggestions for how the dilemma should be resolved. Consider the range of alternatives or courses of action available and their possible consequences.
 - d. Discuss how this ethical dilemma and its attendant value conflicts have influenced your professional thinking and development and your personal and professional values.



Competency 2:

Engage Diversity and Difference in Practice

SPECIALIZED PRACTICE COMPETENCY DESCRIPTION

Macro practitioners engage with a variety of individuals, families, organizations, communities, and other stakeholder groups to dismantle systems of oppression and advance social, economic, and environmental justice. Macro practitioners build on the strength of diversity and the history of people, organizations, and communities to inform collaborative engagement processes. They use an intersectional lens and anti-oppressive approach to develop strategies for engaging and collaborating with people and communities who are marginalized on the basis of characteristics such as race, gender, gender identity, sexual orientation, age, religion, ability, ethnicity, and documentation status. Social workers in macro practice are highly skilled at communicating with those holding different perspectives and worldviews, recognizing the complexities and contradictions at times in addressing multiple oppressions and disparities. They educate diverse stakeholders about how organizational, community, and policy decisions affect vulnerable communities to craft interventions that advance social, economic, and environmental justice. Macro social workers apply research-informed knowledge and the lived experience of affected groups when working with diverse populations to address organizational, community, and societal issues. Macro practitioners are committed to examining how power, implicit and explicit bias, privilege, and oppression are manifested in the social work profession and their own practice.

COMPETENCY BEHAVIORS

Social workers in macro practice

- formulate inclusive engagement strategies based on an intersectional analysis of systems of power, privilege, and oppression both within and outside organizational, community, and policy contexts, including the political economy and, for example, areas of racism, sexism, and nativism;
- demonstrate fluency in a variety of communication styles to effectively engage and work with people of different political ideologies, interests, religious and cultural backgrounds, and points of view;
- engage with diverse stakeholders in promoting a deep self-awareness and cultural humility with an understanding of how one's own personal biases, power, and privilege affect the engagement process and all aspects of macro practice;
- create a climate of inclusion that builds on the strengths of diverse constituencies, integrates diverse points of view, and facilitates full engagement in ways that embrace the cultural and spiritual histories of people;
- recognize the complexities and contradictions that may arise in adhering to the Universal Declaration of Human Rights while respecting cultural differences of clients and constituencies;
- provide opportunities for open discussion about issues to promote sensitivity and use conflicts that arise in practice to forge new understanding and appreciation of one another;
- develop leadership and staff teams in management, policy, and community practice that reflect the diversity of the communities in which they work; and
- mediate tensions and conflicts that arise from managing cultural, political, and social differences between and within diverse groups.

CURRICULAR RESOURCES MAPPED TO COMPETENCY DIMENSIONS

<i>Readings</i>	
Resource	Competency Dimension
ARTICLES	
Burnette, C. E., & Figley, C. R. (2017). Historical oppression, resilience, and transcendence: Can a holistic framework help explain violence experienced by indigenous people? <i>Social Work, 61</i> (1), 37–44.	Knowledge Values Cognitive and Affective Processes
Calderón-Almendros, I., & Calderón-Almendros, R. (2016). “I open the coffin and here I am”: Disability as oppression and education as liberation in the construction of personal identity. <i>Disability & Society, 31</i> (1), 100–115.	Knowledge Values Cognitive and Affective Processes
Cleaveland, C. (2010). “We are not criminals”: Social work advocacy and unauthorized migrants. <i>Social Work, 55</i> (1), 74–81.	Knowledge Values Skills Cognitive and Affective Processes
Eikenberg, J. (n.d.). Debunking the “model Asian” myth: Five ways Asian-Americans still face discrimination. Retrieved from: http://read.hipporeads.com/debunking-the-model-asian-myth-five-ways-asian-americans-still-face-discrimination/	Knowledge Values Skills Cognitive and Affective Processes
Gonyea, J., & Hooyman, N. (2005). Reducing poverty among older women: Social Security reform and gender equity. <i>Families in Society, 86</i> , 338–346.	Knowledge Values Skills Cognitive and Affective Processes

(continued)

Readings (continued)

Resource	Competency Dimension
Hunt, V., Layton, D., & Prince, S. (2015) Why diversity matters. Retrieved from https://assets.mckinsey.com/-/media/857F440109AA4D13A54D9C496D86ED58.ashx	Knowledge Values Cognitive and Affective Processes
Jordan-Zachery, J. S. (2001). Black womanhood and social welfare policy: The influence of her image on policy making. <i>Race Relations Abstracts</i> , 26(3), 5–24.	Knowledge Values Skills Cognitive and Affective Processes
Kanenberg, H. (2012). Feminist policy analysis: Expanding traditional social work methods. <i>Journal of Teaching in Social Work</i> , 33(2), 129–142. doi:10.1080/08841233.2013.772935	Knowledge Values Skills Cognitive and Affective Processes
Lee, J., & Robinson, K. W. (2014). Self-reflections of a gay immigrant social worker. <i>Social Work Faculty Publications</i> , 20(1), 15–28.	Knowledge Values Skills Cognitive and Affective Processes
Lepischak, B. (2004). Building community for Toronto's lesbian, gay, bisexual, and transgender youth. <i>Journal of Gay & Lesbian Social Services</i> , 16(3/4), 81–99.	Knowledge Values Cognitive and Affective Processes
Marsiglia, F. F., & Kulis, S. (2015). <i>Diversity, oppression, and change: Culturally grounded social work</i> (2nd ed.). Chicago, IL: Lyceum.	Knowledge Values Skills Cognitive and Affective Processes

(continued)

Readings (continued)

Resource	Competency Dimension
Mattson, T. (2013). Intersectionality as a useful tool: Anti-oppressive social work and critical reflection. <i>Affilia</i> , 29(1), 8–17.	Knowledge Values Skills Cognitive and Affective Processes
Mor Barak, M. E. (2015). Inclusion is the key to diversity management, but what <i>is</i> inclusion? [Guest editorial]. <i>Human Service Organizations: Management Leadership and Governance</i> , 39, 83–88.	Knowledge Values Skills Cognitive and Affective Processes
Mor Barak, M. E., Lizano, E. L., Kim, A., Duan, L., Hsiao, H. Y., Rhee, M. K., & Brimhall, K. A. (2016). The promise of diversity management for climate of inclusion: A state-of-the-art review and meta-analysis. <i>Human Service Organizations: Management, Leadership and Governance</i> , 4(40), 305–333. doi:10.1080/23303131.2016.1138915	Knowledge Values Skills Cognitive and Affective Processes
Ortega, R. M. (2015). Cultural humility and a caring workplace: Implications for leadership. Retrieved from: https://socialworkmanager.org/nswm-event/webinar-cultural-humility	Knowledge Values Cognitive and Affective Processes
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Pitts, D. W., & Jarry, E. M. (2009). Getting to know you: Ethnic diversity, time and performance in public organizations. <i>Public Administration</i> , 87(3), 503–518.	Knowledge Values Skills Cognitive and Affective Processes

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Readings (continued)

Resource	Competency Dimension
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Steven, F. G., Plaut, V. C., & Sanchez-Burks, J. (2008). Unlocking the benefits of diversity: All-inclusive multiculturalism and positive organizational change. <i>Journal of Applied Behavioral Science, 44</i> (1), 116-133.	Knowledge Values Skills Cognitive and Affective Processes
Sue, D. W., Rasheed, M. N., & Rasheed, J. M. (2016). Understanding the sociopolitical implications of oppression and power in social work practice (Chapter 4, pp. 89-116). <i>Multicultural Social Work Practice</i> . Hoboken, NJ: Wiley.	Knowledge Values Skills Cognitive and Affective Processes
Tejeda, M. J. (2006). Nondiscrimination policies and sexual identity disclosure: Do they make a difference in employee outcomes? <i>Employee Responsibilities and Rights Journal, 18</i> (1), 45-59.	Knowledge Values Skills Cognitive and Affective Processes
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Resource	Competency Dimension
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BOOK CHAPTERS	
Alexander, M. (2012). The color of justice. In <i>The new Jim Crow: Mass incarceration in the age of the colorblindness</i> (pp. 97-104). New York, NY: The New Press.	Knowledge Values Skills Cognitive and Affective Processes
Mor Barak, M. E. (2017). Inclusive leadership: Unlocking the diversity potential. In <i>Managing diversity: Toward a globally inclusive workplace</i> (4th ed., pp. 224-235.). Thousand Oaks, CA: SAGE.	Knowledge Values Skills Cognitive and Affective Processes
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Pyles, L. (2014) <i>Progressive community organizing: A critical approach for a globalizing world</i> (Section 3, "Enduring & emergent issues in organizing"). New York, NY: Routledge.	Knowledge Values Skills Cognitive and Affective Processes

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Readings (continued)

Resource	Competency Dimension
Scheile, J. (2000). The Afrocentric framework of social welfare policy analysis. In <i>Human services and the Afrocentric paradigm</i> (pp. 171-197). New York, NY: Haworth.	Knowledge Values Skills Cognitive and Affective Processes
BOOKS	
Bailey, D., Koney, K. M., McNish, M. E., Powers, R., & Uhly, K. (2008). <i>Sustaining our spirits: Women leaders thriving for today and tomorrow</i> . Washington, DC: NASW Press.	Knowledge Values Skills Cognitive and Affective Processes
Carlton-LaNey, I. (Ed.). (2001). <i>African American leadership: An empowerment tradition in social welfare history</i> . Washington, DC: NASW Press.	Knowledge Values Skills Cognitive and Affective Processes
Gutierrez, L. M., & Reisch, M. (Guest Eds.). (2017). <i>Journal of Community Practice</i> 25(3-4). (Special Issue on Diversity)	Knowledge Values Skills Cognitive and Affective Processes
Mizrahi, T., & Greenawalt, J. (2017). Beyond gender: Intersectionality among male and female community organizers. <i>Journal of Community Practice</i> , 25(3-4), 432-463. (Special Issue on Diversity; Guest Eds. L. M. Gutiérrez & M. Reisch)	Knowledge Values Skills Cognitive and Affective Processes

<i>Media</i>	
Resource	Competency Dimension
<i>Unpacking the invisible knapsack II: Sexual orientation.</i> Retrieved from: http://thebrokenplaces.wordpress.com/2012/05/22/unpacking-straight-privilege/	Knowledge Values Skills Cognitive and Affective Processes
NASW Standards and Indicators for Cultural Competence 2015, updated. Retrieved from https://www.socialworkers.org/LinkClick.aspx?fileticket=PonPTDEBrn4%3D&portalid=0	Knowledge Values Skills Cognitive and Affective Processes
Wicks, J. (2016). It pays to be White. <i>Dollars and Sense</i> . Retrieved from http://www.dollarsandsense.org/archives/2016/0516wicks-lim.html	Knowledge Values Skills Cognitive and Affective Processes
National Public Radio. (2013, December 23). The truth behind the lies of the welfare queen. <i>All Things Considered</i> . Retrieved from http://www.npr.org/sections/codeswitch/2013/12/20/255819681/the-truth-behind-the-lies-of-the-original-welfare-queen	Knowledge Values Skills Cognitive and Affective Processes
University of Pittsburgh Center on Race and Social Problems (CRSP, http://crsp.pitt.edu/) Dozens of studies on racial disparities across a range of social problems and videos of CRSP lectures featuring the nation's leading experts on race and social problems in America.	Knowledge Values Skills Cognitive and Affective Processes
NASW (2007). <i>Institutional racism & the social work profession: A call to action</i> (pp. 3–21). Retrieved from https://ncwwi.org/files/Cultural_Responsiveness_Disproportionality/Institutional_Racism_and_the_Social_Work_Profession.pdf	Values

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Media (continued)

Resource	Competency Dimension
People's Institute for Survival and Beyond: http://www.pisab.org/ Focuses on understanding what racism is, where it comes from, how it functions, why it persists, and how it can be undone.	Knowledge Values Skills Cognitive and Affective Processes
Cheadle, D., & Haggis, P. (Producer), & Haggis, P. (Director). (2004). <i>Crash</i> [Motion picture]. Santa Monica, CA: Lionsgate.	Knowledge Values
<i>Race: The power of an illusion</i> , episodes II and III: The stories we tell and the house we live in. Retrieved from https://www.facinghistory.org/educator-resources	Knowledge Values Cognitive and Affective Processes
TED Talk by Nate Silver about research on racism and voting. Retrieved from https://www.ted.com/talks/nate_silver_on_race_and_politics	Knowledge Values
TED Talk by Camara Jones, "Allegories on race & racism," Retrieved from https://www.youtube.com/watch?v=GNhcY6fTyBM	Knowledge Values
Chicago Public Radio. Trends with benefits. <i>This American Life</i> . http://www.thisamericanlife.org/radio-archives/episode/490/trends-with-benefits This podcast is about disability policy and how the end of welfare has led to an increase in disability claims.	Knowledge Values Cognitive and Affective Processes
<i>GenSilent</i> (2010): http://gensilent.com This documentary interviews six older LGBT people about their fears about accessing formal care as a sexual or gender minority. Discussion topics are available on the website.	Knowledge Values Cognitive and Affective Processes

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Media (continued)

Resource	Competency Dimension
<p><i>inSocialWork</i> podcast series</p> <p>Episode 9: Dr. Hilary Weaver, “Culturally Competent Supervision”</p> <p>http://www.insocialwork.org/episode.asp?ep=9</p> <p>This episode features Dr. Hilary Weaver speaking at the Fourth International Interdisciplinary Conference on Clinical Supervision, convened in Buffalo, NY, Spring 2008. Dr. Weaver discusses diversity issues in the context of supervision, highlighting the transactional model of identity and the critical role supervisors have in promoting, modeling, and developing cultural competence within human service organizations.</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>

In-Class Exercises

Resource	Competency Dimension
<p>Cultural Self-Identification</p> <p>This exercise helps students identify the commonalities between people rather than differences.</p> <p>See Appendix 2A.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p>
<p>Power Exercise</p> <p>This multipart exercise demonstrates who has power, where power comes from, and the implications of power for policy practice.</p> <p>See Appendix 2B.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Privilege and Policy</p> <p>This exercise, adapted from <i>White privilege: Unpacking the invisible knapsack</i> (1988), by Peggy McIntosh, explores the various types of privilege and the role of privilege in policy making and advocacy.</p> <p>See Appendix 2C.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Spotlight on Youth Organizing (Case Study)</p> <p>This exercise focuses on how youth organizing engages with race, gender identity, intersectionality, and the dimensions of power, privilege, and oppression raised by considering the obstacles youth face in getting their voices heard and needs met through collective action.</p> <p>See Appendix 2D.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

Assignments	
Resource	Competency Dimension
<p>Engaging Diversity in Management and Administration: Comprehensive Paper Assignment</p> <p>Reference: Mor Barak, M. E. (2017). <i>Managing diversity: Toward a globally inclusive workplace</i>. Thousand Oaks, CA: SAGE.</p> <p>Students will be randomly assigned to a team of three members. As a team they will select a human service organization on which to write a 15-page paper and prepare a PowerPoint presentation examining the organization's policies and practices for engaging diversity.</p> <p>See Appendix 2E.</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>
<p>Preparing to Engage With a New Organization</p> <p>This assignment exposes a student to a new situation, requires careful observation of surroundings, and asks the student to describe what he or she felt and what other people might feel to have the student among them. Your assignment is to go by yourself (you may not take anyone with you) to a place you have not been before and observe what you see (and participate, if appropriate). Please note that these two conditions (doing something you have not done before and doing it by yourself) are important. After your field experience, you will write a 3- to 4-page paper about the experience, using the guidelines provided.</p> <p>See Appendix 2F.</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>
<p>Social Work Pioneers of Color Biographical Sketch</p> <p>In this assignment, students develop a presentation about a social work pioneer of color.</p> <p>See Appendix 2G.</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>

<i>Field-Related Activities</i>	
Resource	Competency Dimension
<p>Handling Diversity, Disparities, Multiculturalism, and “the Isms”</p> <p>Critically examine your agency on how it reflects and addresses issues of disparities and diversity. How is difference handled in the agency? What systems are in place to accommodate the needs of a diverse population, particularly those related to issues of race, gender, sexual orientation, disability, immigration status, age, and ethnicity? Can you identify ways in which any or all of the “isms” are manifested and addressed in the organizational structure and staff roles—formally in policy and informally in practice? What mechanisms are in place to resolve difference and disparities? Can you or others you speak to identify microaggressions? In what ways is the agency working to improve their practice? Identify one project or practice to change or strengthen systems of oppression and describe a strategy or project that could be used to implement the change. (Optional: Introduce and implement the strategy or project you described in your agency.) Disguise or omit the agency name. Apply relevant readings.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

APPENDIX 2A: CULTURAL SELF-IDENTIFICATION

Objectives

- 1) Recognize and identify cultural definitions of self.
- 2) Identify similarities and differences between learner-identified cultural definitions.
- 3) Demonstrate an understanding of cultural similarities and differences through an application project.

Each person’s cultural orientation influences what he or she perceives as reality, both individually and socially. Passed down from generation to generation, changing and adapting over time, culture is neither rigid nor static, and within its boundaries, there is generally broad diversity.

In the United States, it is important for cultures to be able to coexist. Unlike the perception of the 1950s and 1960s, the United States is not the melting pot that Glaser and Moynihan suggested but is a very ethnically diverse country.

In fact, the United States is fast becoming the most ethnically diverse country in the world.

To understand how that diversity relates to the field, it is important to understand the concept of culture and how culture relates to values and perceptions in each of us. A person's culture begins at birth. Groups use culture to help define whom its members recognize as an ally or an enemy. Distinctions exist between groups as a way of establishing boundaries. Many people feel that their experiences are unique; however, there is some similarity between cultures. With dwindling resources, it is important to understand where some of the similarities are between cultures to be able to help cross-culturally.

The question arises as to whether it is best to learn about other cultures or to recognize that each of us is affected by cultural values. By understanding our own cultural values, we will then be able to develop a better feeling of how our culture influences another's behavior.

Activity

- Define yourself culturally. Use an expansive self-definition, recognizing that influences are multiethnic and multicultural. Include gender, culture, geography, age, and any other definitions that you may use to describe yourself.
- Learners then introduce themselves culturally. Record each learner's name and self-defined culture on the board, verifying the accuracy. State that everyone has a right to cultural self-definition.

A person's cultural identity may differ from how others think of them. Reinforce that you may define yourself as part of a cultural domain, but another group may not recognize you as part of that cultural identity. However, everyone has a right to their own cultural self-definition.

Develop Subgroups

- Look at cultural self-definitions on the board and see whether categories emerge. Categories could include religion, geographic area, class issues, countries of origin, and the like.
- Identify enough categories so there will be about four or five learners per group.

- Identify locations where groups will meet and have learners choose the group they want to enter. Learners may have a difficult time in choosing their group. Help them clarify their choice, but do not make it for them.
- Tell learners to recall the messages they were taught as children about their culture, the world, and acceptable standards of behavior. Think of any of the admonitions, sayings, all rhymes you can remember. Examples include “time is money,” “a stitch in time saves nine,” and “cleanliness is next to godliness.” These sayings reflect the attitudes, behaviors, and expectations that relate to the norms, values, mores, and ethics of that culture.
- Specific domains that each group may want to consider include
 - gender roles
 - relationships to authority
 - discipline and child–parent relationships
 - expressions of affection
 - importance of time
 - help-seeking behaviors
 - role of religion
 - educational goals
 - importance placed on ambition and economic success
 - relationship to the law
 - perceptions of health and wellness
 - attitudes to medical professionals
- If useful, first record statements in a native language before trying to identify the English equivalent.

- After subgroups have had a chance to develop their lists (about 30 minutes), introduce any observations that were observed about the process the groups experienced to complete the assignment.
- Each group should share their lists of cultural norms, values, mores, ethics and laws, customs, relationships to authority, help-seeking behaviors, time orientations, gender defined roles, and so on.
- Process within-group experiences so groups learn from each other. Point out that some of the experiences may have been perceived as familial experiences that in reality turned out to be larger cultural differences.
- Once the learners have identified their own cultural values and how they relate to their own practice, discuss how they could use the information in being responsive to other cultural groups. Focus on Middleman's entry skills such as:
 - Stage setting: attention to physical setting, recognizing that many people are ashamed of having to seek help.
 - Tuning in: preparatory empathy, being aware of a sense of distrust that may exist toward helping professionals.
 - Attending: purposeful behavior designed to convey a message of respect and feeling that what they are discussing is important. Be aware of different messages of eye contact between cultural groups. Asians may consider eye-to-eye contact as being shameful. Americans tend to look at people's mouths, not eyes. Try to see the client in his or her frame of reference; step outside yourself into their frame of reference. Share your feelings with the client as appropriate, and be aware of appropriate roles.
 - Contracting: This is a Western concept. Time norms vary by cultural group. Be patient but also recognize organizational requirements, such as payment for the scheduled hour even if they began late, ending on time.

APPENDIX 2B: POWER EXERCISE

Step 1: Clarify goals of exercise:

- More clearly identify characteristics that give people power.
- Understand that power is not neutral.
- Understand better the sources of power.
- Consider the implications of power for policy practice.

Step 2: Draw a horizontal line in the middle of a piece of flip chart paper. Explain that this is the “power” line; those above the line have greater access to power, those below the line don’t.

Step 3: Ask the group to name characteristics that give people power (e.g., money, skin color, education). For each characteristic that gets placed above the power line, instruct the students to identify the corresponding “powerless” characteristic (e.g., if being a boss falls on top of the line, being an employee would fall under the line). As each “power pair” is named, write it on the flip chart paper. Make sure to help the students draw the conclusion that power is not neutral; characteristics that give power inherently imply that those without that characteristics are cut off from power. Push the students to think beyond the obvious sources of power (including characteristics such as where people live, networks of friends, union status of workers, ability).

The end result should look like the following, with as many characteristics as the class can come up with (use multiple sheets of paper if necessary):

Boss
People with jobs
White
Socially connected
Highly educated

Employee
Unemployed
People of color
Social disconnected
Uneducated

Step 4: Ask students to identify how each of these characteristics contributes to one's sense of power. Discuss how these characteristics relate to one another (e.g., being a man is a "power" characteristic, but being a person of color is not. What does this mean for men of color?). Some sample discussion questions could include the following:

- Give a concrete example of how these characteristics are used to reinforce one's power.
- Are some characteristics more important than others?
- How much control over these characteristics does someone have? Are there characteristics related to power that you can change? Are there some you are born into?
- How obvious are these characteristics? Are there characteristics related to power that people can hide?

Consider the implications of these characteristics in the policy practice context, including each stage of the policy cycle (problem identification, agenda setting, policy formulation, policy legitimation, policy implementation, and policy evaluation).

Step 5: Ask students to identify circumstances or conditions under which "powerless" characteristics can actually result in more power in the policy practice context. Here we are trying to reinforce that these characteristics are fluid, not static. In other words, relative to the boss, employees have less power; however, this same person seems powerful when compared to those without a job. Likewise, in some communities being White does not mean that you have political power.

Step 6: Ask students to draw their own personal power chart. On their own sheet of paper, they should recreate the power chart, noting their own characteristics and where they fall relative to the power line. For example, the personal power chart for a White, male, working-class student might look like the following:

White
Male
Highly educated
Employed
Socially connected

Person of color
Female
Student
Non-unionized employee
Socially disconnected

Ask students to share the results of their personal power chart. Sample questions could include the following:

- Did anything surprise you?
- Any characteristics you hadn't thought of before?
- How does your position on the power chart affect how you are perceived in the communities in which you might work?
- How might your own power position affect your work in policy practice? What steps can you take to make sure that it does not adversely affect your work?
- Based on this understanding of power, how might you formulate inclusive engagement strategies with various stakeholders in the policy practice community?

Step 7: Wrap up by discussing the fact that even though certain people and communities fall on the lower end of the power chart, it does not mean that they are completely powerless or that they cannot represent their own interests. Understanding where power comes from will help you strategically equalize power dynamics among different stakeholders in the policy process.

APPENDIX 2C: PRIVILEGE AND POLICY

(Adapted from *Unpacking the Invisible Knapsack* by Peggy McIntosh)

Read each item below. Place a check mark in the margin next to those that accurately describe your experience. (This exercise can also be done by reading out each item and having students who identify with it step forward into the center of the room).

- 1) I can be late for a meeting without it being attributed to my race.
- 2) I can go to a movie on short notice, without having to save up for it.
- 3) Most of my professors look like me and talk like me, and most of the curriculum reflects my culture, history, and background.
- 4) If I choose to work full-time, it is unlikely that people will question my commitment to my family.
- 5) I can go grocery shopping without worrying that others will pass judgment on what I choose to purchase.
- 6) No one has ever questioned my right to live in this country.
- 7) In general, I am not under much pressure to be thin or to worry about how people will respond to me if I'm overweight.
- 8) If I am fired, not given a raise, or not hired, I am unlikely to question whether it had to do with my age.
- 9) I am likely to hear music on the radio and see specials on television that celebrate the holidays of my religion.
- 10) People from my country of origin are visible and positively represented in politics, business, and the media.
- 11) I can attend class without having to seek special accommodations.
- 12) Most people portrayed as sexual objects in the media are not the same sex as I am.
- 13) I've never lived in a neighborhood that I considered unsafe.

- 14) I've never had to skip a meal because I couldn't afford to buy food.
- 15) My elected representatives are mostly people of my sex. The more prestigious and powerful the elected position, the more this is true.
- 16) I can find a place to worship or practice my religion almost anywhere I go.
- 17) I never have to explain why I don't celebrate the same holidays as others.
- 18) I do not need to worry about the ramifications of disclosing my religious identity to others.
- 19) People generally assume that I can communicate proficiently in English.
- 20) I can shop in most stores and not be followed by a security guard on suspicion that I might be shoplifting.
- 21) I can shop for a house without having to worry that the realtor might not show me all available houses in my price range.
- 22) As an undergraduate, I had a credit card that my parents paid for.
- 23) Most people do not consider my religious practices to be "weird."
- 24) When I apply for a job, my legal right to work in this country probably will not be questioned.
- 25) No one in my immediate family has ever been on welfare.
- 26) If I have children and a successful career, few people will ask me how I balance my professional and private lives.
- 27) No one is likely to think that I got my job because of affirmative action.
- 28) I expect to get an inheritance from my family.
- 29) No one has challenged my right to use the restroom of my choice.
- 30) I've taken a vacation outside the United States.
- 31) I can be fairly confident that I will be paid the same as other employees performing the same or similar work.
- 32) People rarely mispronounce my name.

- 33) There's no part of my identity that I have to hide from most people to feel safe.
- 34) I can move about in public without fear of being harassed or physically attacked because of my sexual orientation or gender identity.
- 35) If I want to, I can easily find a religious community that will not exclude me because of my sexuality.
- 36) I don't have to worry about whether or not a building is accessible.
- 37) I can hear everything I need to without the use of an assistive device.
- 38) I can go alone to a club or on a date without worrying about being sexually assaulted.
- 39) When I ask to see "the person in charge," odds are I will face a person of my sex. The higher up in the organization the person is, the surer I can be.
- 40) I do not have to think about the message my wardrobe sends about my sexual availability.
- 41) When I pay by credit card in a face-to-face transaction, it's unlikely that my financial reliability will be questioned.
- 42) I am never asked to speak for all the people of my racial group.
- 43) I can assume that I will not have to work or go to school on my religious holidays.
- 44) My religious views are reflected by the majority of government officials and political candidates.
- 45) Food that honors my religious practices can be easily found in any restaurant or grocery store.
- 46) I have never been homeless or evicted from my place of living.
- 47) I don't worry about being stopped by the police when I am in an unfamiliar neighborhood.
- 48) People do not assume I am poor because of my nationality.

- 49) People rarely ask me what country I'm from.
- 50) No one in my family has ever been mistaken for a valet, busboy, or custodian.

Questions

- Identify the various types of privilege this exercise speaks to. On the basis of which characteristics are you privileged?
- How does privilege manifest itself in policy and policymaking? How might your own privilege be relevant to your role and success as an advocate?
- Present a specific example of a policy that perpetuates these societal biases. Present an example of how policy could be used to minimize the advantages that come with privilege.

APPENDIX 2D:

CASE STUDY: SPOTLIGHT ON YOUTH ORGANIZING

More and more, young people around the world are organizing around a variety of issues across racial, class, and other divides. Youth bring vital strengths to community organizing, including life experiences in their families and communities, creative ideas, technological savvy, passion, and integrity. They are organizing around LGBTQ issues, public education, immigration, homelessness, and environmental justice. Arguing that the civic engagement of youth can move beyond recycling clubs or other service-oriented projects, youth are increasingly being viewed as relevant constituents who are capable of confronting various power structures and winning important gains. Organizing youth represents a tremendous hope for social change for the future. By raising consciousness, fostering organizing skills, and supporting youth activist agendas, we are planting the seeds of sustainable social change work for the future.

Riot Youth

Riot Youth is an LGBTQ-led youth group in Ann Arbor, Michigan, that is working on building an inclusive community “through leadership skill building,

community organizing, networking, support and socializing.” Riot Youth is particularly concerned with the climate of schools and has more than 80 members from 15 different high schools in the region. The youth, allies, and adult mentors strive to influence school policy and climate through trainings of administrators, teachers, and counselors on creating a safe and respectful climate; youth ally trainings; a climate survey; theater (combining stories and statistics from the survey) with discussions; and participation in school board and other meetings with decision makers on how to stop bullying and harassment. Riot Youth also is a space for youth to talk and find support about their struggles. It has workshops on a range of topics such as gender identity and expression, intersections of LGBTQQA identity with race and other social identities, LGBTQQA history, and writing workshops. It also plays theater games, hosts movie nights, has parties, and hosts a queer prom.

Participatory action research (PAR) has been used as an inclusive and community-based tool for organizing in a variety of settings. One particularly fruitful undertaking was a PAR project conducted by Riot Youth. This project was conducted under the leadership of Riot Youth and an adult mentor. The purpose of the project was linked to Riot Youth’s ongoing campaign that focused on youth empowerment and institutional change in local high schools. The youths surveyed 1,200 students in four high schools about school climate related to safety of LGBTQ youth. With adult assistance, the youths wrote a final report and developed strategies for dissemination, which included creative performances to convey the findings. In addition to numerous requests for performances in the area, the Riot Youth survey received local, state, and national media attention. These efforts have resulted in the Ann Arbor School District changing its antidiscrimination policy to include gender identity and expression, including required in services for school counselors, co-led by Riot Youth.

The survey development process entailed sharing stories and developing a critical analysis of experiences. The development of the demographic section of the survey, particularly the development of questions about race, created an opportunity to discuss intersectionality and how race influenced people’s experiences with their sexual identity. This experience affirms that each step of the PAR process can be an opportunity for consciousness raising and leadership development.

Besides technical support related to survey development and analysis, the adult partners helped youth by providing context and language to politicize their personal struggles and by facilitating access to key gatekeepers in positions of power. One of the key tensions in progressive youth organizing generally is that of adult–youth relationships, the question of how in practice adults can act as consultants and mentors rather than directors. In the case of Riot Youth, the adult advisors maintain a fluid role, which acknowledges that “youth need various types of support at different points in time.” Thus, adults regularly evaluate their power and privilege and receive feedback and direction from the youth.

Discussion Questions for Youth Organizing Case Study

- 1) In what ways are youth marginalized or vulnerable community members? In what ways do they have power and privilege?
- 2) Discuss how intersectionality affects youth organizers. Consider the realities of race and ethnicity, gender, class, and sexual orientation.
- 3) What techniques can be used to strengthen the collective efficacy of a group of youth who share some similarities and common goals but have significant diversities among them (e.g., related to class, immigration status, gender identity, or race or ethnicity)?
- 4) In considering youth–adult partnerships, how can practitioners (adults) attend to their own privilege and hold empowering spaces for youth?
- 5) Sometimes community organizing is risky business as youth speak truth to power and take direct action. What are the ethical responsibilities that practitioners have to youth in terms of:
 - a. ensuring their basic needs are met (emotional, physical, etc.);
 - b. avoiding unintended consequences that speaking out or engaging in direct action may have for them;
 - c. attending to the realities of youth who are particularly vulnerable (e.g., immigrant youth).
- 6) How do we attend to these issues while still embracing the value of self-determination (i.e., that they have rights to make choices for their lives)?

APPENDIX 2E: ENGAGING DIVERSITY IN MANAGEMENT AND ADMINISTRATION: COMPREHENSIVE PAPER ASSIGNMENT

You will be randomly assigned to a team of three members. As a team you will select a human service organization. You are asked to write a 15-page paper and prepare a PowerPoint presentation examining the organization's policies and practices for engaging diversity. Use the following questions as your guide:

- 1) Introduction and overview of the organization: What are the main activities and mission statement of the organization? What does it say about diversity of its clients and its workforce?
- 2) How does the organization accommodate and engage the diversity of its employees and clients? What are the specific relevant policies and practices?
- 3) Are there gaps in the organization's policies and programs? Critically describe and analyze them.
- 4) What is the diversity profile of the management team as compared to the organization (if available)? What is the diversity of the board of directors (if available)?
- 5) You were hired by this organization to help it engage diversity in its management and administration practices and make it an inclusive organization. Based on your analysis, make three suggestions. Be creative yet reasonable. Justify your suggestions by using references and indicate the anticipated benefits of your suggested policies or programs to employees, their families, the community, and the work organization as a whole. Use at least 10 references from the course readings.

Your team will make a 15-minute presentation to class using PowerPoint.

APPENDIX 2F: PREPARING TO ENGAGE WITH A NEW ORGANIZATION

Background

The following assignment exposes you to a new situation, requires you to carefully observe your surroundings, and asks you to describe what you felt and what other people might feel to have you among them. Your assignment is to go by yourself (you may not take anyone with you) to a place you have not been before and to observe what you see (and participate, if appropriate). Please note that these two conditions (doing something you have not done before and doing it by yourself) are important. After your field experience, write a 3- to 4-page paper that includes the following:

- date and address of where the experience took place;
- length of time you were there;
- brief description of the setting;
- your reaction to the situation in terms of your behavior and feelings;
- the reactions of the other people toward you;
- what this experience teaches you about being different from others in your environment;
- how such an experience might influence your development if you were to live or work in such a setting for a major portion of your life;
- relevance of theory and readings in any of the texts;
- concluding comments.

Listed below are some examples of places other students have visited:

- A Protestant visits a Buddhist service.
- A White person visits a Black church and student organization.
- A hearing person visits a school for the deaf.
- A native Angelino visits a gathering of international students.

Do not choose a setting where you would feel like an intruder into someone's privacy. In some situations, you may need to get permission to observe the group. Use your good judgment. Do not place yourself into a situation that is physically dangerous to you. Choose a setting that you truly want to learn about so you don't feel like an "undercover agent." Papers must be typed, double-spaced, with 1-inch margins, Times New Roman 12-point font. They will also be evaluated on the extent to which they are clearly organized, with no grammatical or spelling errors. In writing your paper, make sure to include specific and relevant references to the readings and their content (use at least five references from the course readings).

Assignment adapted from Mark, D. (1989). *Organizational behavior experiences and cases*. St. Paul, MN: West Publishing Company; and from Professor Ellen Ernst Kossek, Michigan State University.

APPENDIX 2G: SOCIAL WORK PIONEERS OF COLOR BIOGRAPHICAL SKETCH

This assignment is designed to expand the students' knowledge of social welfare pioneers. Each student should select a pioneer of color and prepare a PowerPoint presentation about him or her that will be presented in class.

Areas to cover include the following:

- a brief biographical overview and pictures of the pioneer
- a discussion of the political, economic, and social conditions that were emerging and served as the context for the pioneer's contribution to social welfare policy services
- a description of the pioneer's contributions to social welfare policy or services
- support and reactions from contemporary colleagues
- implications for social work

How did the pioneer's contributions contribute to social justice? What has been the impact of the pioneer's work on the social work profession, including a particular field of practice (e.g., child welfare, school social work, medical social work, community social work)?

Whenever possible, PowerPoint presentations must include a picture of the pioneer, photographs from the times, or other graphic representations of their contributions. A short question-and-answer period will follow each presentation.

For ideas, go to <http://www.naswfoundation.org/pioneer.asp> or review the following resource: Carlton-LaNey, I. (Ed.). (2001). *African American leadership: An empowerment tradition in social welfare history*. Washington, DC: NASW Press.



Competency 3:

Advance Human Rights and Social, Economic, and Environmental Justice

SPECIALIZED PRACTICE COMPETENCY DESCRIPTION

Macro practice social workers advance human rights and social, economic, and environmental justice with, and on behalf of, individuals, families, organizations, communities, and larger social structures. Human rights and social justice are fundamental to social work and necessary for every human being to live in freedom and with dignity, security, and equality. Informed by theories of justice, human rights, power dynamics, and other frameworks, macro practice social workers advance human rights and social, economic, and environmental justice locally and globally. Macro social workers recognize historical legacies of oppression and discrimination and challenge social policies and practices that tolerate or promote racism, sexism, heterosexism, and other discriminatory treatments of people based on identities including age, disability, religion, and national origin. They understand that the realization of human rights is mediated and influenced by local, state, federal, and international policies. Macro social workers design and advance public policies using the Universal Declaration of Human Rights, which guarantees all people the right to work, housing, healthcare, education, leisure, privacy, economic security, and a clean, safe, and sustainable environment. They promote the right to vote, the right to protest, and other forms of civic participation to fully and freely engage in democratic processes.

COMPETENCY BEHAVIORS

Social workers in macro practice

- integrate knowledge of human rights theories, frameworks, international documents, conventions, and covenants into practice to improve social, economic, and environmental well-being;
- engage members of society in designing and promoting programs and services that address human rights to access resources that ensure social, economic, and environmental equity;
- identify issues, develop strategies, evaluate outcomes, and promote human rights and social justice with affected clients and constituencies;
- analyze and participate in the political process and political climate when engaging in organizational, community, and policy change on behalf of human rights and social justice; and
- identify and engage key stakeholders to advocate for access to resources, services, benefits, and opportunities for vulnerable and marginalized clients, constituencies, and communities.

CURRICULAR RESOURCES MAPPED TO COMPETENCY DIMENSIONS

<i>Readings</i>	
Resource	Competency Dimension
ARTICLES	
Aspen Roundtable. (2004). Structural racism and community building (pp. 8–25). Retrieved from http://www.aspeninstitute.org/sites/default/files/content/docs/rcc/aspen_structural_racism2.pdf	Knowledge Values Skills
Constance-Huggins, M. (2011). A review of the racial biases of social welfare policies. <i>Journal of Human Behavior in the Social Environment</i> , 21, 871–887.	Knowledge Values Skills

(continued)

Readings (continued)

Resource	Competency Dimension
Jewell, J. R., Collins, K. V., Gargotto, L., & Disohn, A. J. (2009). Building the unsettling force: Social workers and the struggle for human rights. <i>Journal of Community Practice, 17</i> (3), 309–322.	Values Cognitive and Affective Processes
Jones, C. (2000). Levels of racism: A theoretic framework and a gardener's tale. <i>American Journal of Public Health, 90</i> (8), 212–215.	Knowledge Values Cognitive and Affective Processes
Karger, H. (2015). Curbing the financial exploitation of the poor: Financial literacy and social work education. <i>Journal of Social Work Education, 51</i> (3), 425–438.	Knowledge Values Cognitive and Affective Processes
Kattari, S. K., Walls, N. E., Whitfield, D. L., & Langenderfer Magruder, L. (2017). Racial and ethnic differences in experiences of discrimination in accessing social services among transgender/gender-nonconforming people. <i>Journal of Ethnic & Cultural Diversity in Social Work, 26</i> (3), 217–235.	Knowledge Values Cognitive and Affective Processes
Lysack, M. (2015). Effective policy influencing and environmental advocacy: Health, climate change, and phasing out coal. <i>International Social Work, 58</i> (3), 435–447. doi:10.1177/0020872814567485	Knowledge Values Cognitive and Affective Processes
National Association of Social Workers. (2015). International policy on human rights. In <i>Social work speaks: NASW policy statements</i> (10th ed.). Washington, DC: NASW Press.	Knowledge Values Cognitive and Affective Processes
Queiro Tajalli, I., McNutt, J., & Campbell, C. (2003). International social and economic justice and on-line advocacy. <i>International Social Work, 46</i> (2), 149–161.	Knowledge Values Cognitive and Affective Processes

(continued)

Readings (continued)

Resource	Competency Dimension
Solomon, D, & Ross, T. (2016). <i>Protecting America from racism in the water</i> . Retrieved from: https://www.americanprogress.org/issues/race/news/2016/02/03/130524/protecting-america-from-racism-in-the-water/	Knowledge Values Cognitive and Affective Processes
Traub, A., & Ruetschlin, C. (2017). The racial wealth gap: Why policy matters. Retrieved from http://www.demos.org/publication/racial-wealth-gap-why-policy-matters	Knowledge Values Cognitive and Affective Processes
BOOK CHAPTERS	
Homan, M. B. (2016). <i>Promoting community change: Making things happen in the real world</i> (Chapter 7, pp. 201–227). Belmont, CA: Brooks/Cole.	Knowledge Values Cognitive and Affective Processes
Lombe, M. (2013). Rights-based framework and social work. In C. Franklin, T. Bent-Goodley, E. Clark, et al. (Eds.), <i>Encyclopedia of social work</i> (p. x). Washington, DC: NASW Press and Oxford University Press.	Knowledge Values Cognitive and Affective Processes
Reichert, E. (Ed.). (2007). Human rights in the twenty-first century: Creating a new paradigm for social work. In E. Reichert (Ed.), <i>Challenges in human rights: A social work perspective</i> (pp. 1–15). New York, NY: Columbia University Press.	Knowledge Values Cognitive and Affective Processes
Homan, M. B. (2016). <i>Promoting community change: Making things happen in the real world</i> (Chapter 7, pp. 201–227). Belmont, CA: Brooks/Cole.	Knowledge Values Cognitive and Affective Processes

(continued)

Readings (continued)

Resource	Competency Dimension
Lombe, M. (2013). Rights-based framework and social work. In C. Franklin, T. Bent-Goodley, E. Clark, et al. (Eds.), <i>Encyclopedia of social work</i> (p. x). Washington, DC: NASW Press and Oxford University Press.	Knowledge Values Cognitive and Affective Processes
Reichert, E. (Ed.). (2007). Human rights in the twenty-first century: Creating a new paradigm for social work. In E. Reichert (Ed.), <i>Challenges in human rights: A social work perspective</i> (pp. 1-15). New York, NY: Columbia University Press.	Knowledge Values Cognitive and Affective Processes
BOOKS	
Androff, D. (2016). <i>Practicing rights: Human rights-based approaches to social work practice</i> . London, UK: Routledge.	Knowledge Values Skills
Farmer, P. (2003). <i>Pathologies of power: Health, human rights, and the new war on the poor</i> . Berkeley: University of California Press.	Knowledge Values Cognitive and Affective Processes
Libal, K., & Harding, S. (2015). <i>Human rights-based community practice in the United States</i> . New York, NY: Springer.	Knowledge Values Cognitive and Affective Processes
Reisch, M. (Ed.). (2014). <i>The Routledge international handbook of social justice</i> . London, UK: Routledge.	Knowledge Values Cognitive and Affective Processes
Reisch, M. (2018). <i>Social policy and social justice: Meeting the challenges of diverse society</i> (3rd ed.). San Diego, CA: Cognella Academic Publishing.	Knowledge Values Cognitive and Affective Processes

(continued)

Readings (continued)

Resource	Competency Dimension
Reisch, M., & Garvin, C. (2016). <i>Social work and social justice: Concepts, challenges, and strategies</i> . New York, NY: Oxford University Press.	Knowledge Values Cognitive and Affective Processes
Wilkinson, R., & Pickett, K. (2010). <i>The spirit level: Why greater equality makes society stronger</i> . London, UK: Bloomsbury Press.	Knowledge Values Cognitive and Affective Processes

Media

Resource	Competency Dimension
Universal Declaration of Human Rights. http://www.un.org/en/universal-declaration-human-rights/	Knowledge Values Cognitive and Affective Processes
Video: <i>Inequality for All</i> , hosted by Robert Reich (1 hour, 50 minutes). http://inequalityforall.com/	Knowledge Values Cognitive and Affective Processes
Video: <i>Closing the Women's Wealth Gap</i> (4 minutes). http://womenswealthgap.org/video/	Knowledge Values Cognitive and Affective Processes
Video: <i>Crash Course Economics: Income and Wealth Inequality</i> (10 minutes). https://www.youtube.com/watch?v=0xMCWr003Hs&t=23s	Knowledge Values Cognitive and Affective Processes

(continued)

Media (continued)

Resource	Competency Dimension
Animated video: <i>A More Perfect Union</i> (about Jim Crow and voting; 3 minutes). https://www.youtube.com/watch?v=AA87JWa0bEw	Knowledge Values Cognitive and Affective Processes
Video: <i>The Racial Wealth Gap</i> (3 minutes). http://robertreich.org/post/143497867115	Knowledge Values Cognitive and Affective Processes
Podcast: <i>School Haze</i> . Reveal. https://www.revealnews.org/episodes/school-haze/	Knowledge Values Cognitive and Affective Processes
Video: Hans Rosling, <i>200 Countries, 200 Years, 4 Minutes</i> . The Joy of Stats. https://www.youtube.com/watch?v=jbkSRLYSojo	Knowledge Values Cognitive and Affective Processes
<i>Wealth Inequality in America</i> (2012). https://www.youtube.com/watch?v=QPKKQnijnsM This documentary explains the development of the wealth gap, concluding that 1% owns 40% of wealth.	Knowledge Values Cognitive and Affective Processes
<i>Life in the Cash Economy for the "Underbanked" Americans</i> (2015). http://www.pbs.org/newshour/bb/business-july-dec13-cashonly_12-15/ This 6-minute segment from <i>PBS News Hour</i> explains why banks rarely exist in poor neighborhoods.	Knowledge Values Cognitive and Affective Processes

(continued)

Media (continued)

Resource	Competency Dimension
<p><i>What's the Economy For, Anyway?</i> (2009). Bullfrog Films, Inc. Ecological economist Dave Batker questions whether gross domestic product is an adequate measure of society's well-being and suggests workable alternatives (40 minutes). http://www.bullfrogfilms.com/catalog/wefa.html</p>	<p>Knowledge Values Cognitive and Affective Processes</p>
<p>United Nations Sustainable Development Goals (2017). http://www.un.org/sustainabledevelopment/ Provides international definitions associated to human rights, with solutions on how to address them.</p>	<p>Knowledge Values Cognitive and Affective Processes</p>

In-Class Exercises

Resource	Competency Dimension
<p>The Wealth Gap Have students watch the film <i>Inequality for All</i>. Ask them to submit two questions that can be used for class discussion. To ensure that policy practice issues are addressed, questions could include the following:</p> <ol style="list-style-type: none"> 1. Identify one policy change that could address one of the challenges raised in the film. 2. What might be some beginning steps in initiating that policy change? 3. In what ways could social workers help address some of the challenges brought up in the film? 	<p>Knowledge Values Cognitive and Affective Processes</p>
<p>Human Rights as a Frame for Policy Practice This exercise explores what people need to develop fully as human beings and the degree to which policy is responsive to these needs. See Appendix 3A.</p>	<p>Knowledge Values Cognitive and Affective Processes</p>
<p>Theories of Justice: Class Debate Students explore contemporary justice theories, including utilitarianism, egalitarianism, libertarianism, and communitarianism, and engage in a debate about poverty reduction from these varying perspectives. See Appendix 3B.</p>	<p>Knowledge Values Cognitive and Affective Processes</p>

(continued)

In-Class Exercises (continued)

Resource	Competency Dimension
<p>Financial Literacy Quiz</p> <p>http://www.usfinancialcapability.org/quiz.php</p> <p>This online quiz asks financial literacy questions related to the noncash economy. Focus is on knowledge about interest rates, inflation, different types of mortgages, and stocks and bonds.</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>
<p>Spent</p> <p>http://playspent.org/</p> <p>Spent is a budget simulator that takes students through a typical poverty-level monthly budget beginning with a \$1,000 balance. Students must then decide how to spend the money. By using Spent in a small group in-class assignment, students benefit from discussing choices together (e.g., smash your child's piggy bank or donate plasma).</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>

Assignments

Resource	Competency Dimension
<p>Human Rights Policy Critique</p> <p>Students apply and critique one of the declarations, conventions, or resolutions of the United Nations.</p> <p>See Appendix 3C.</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>

<i>Field-Related Activities</i>	
Resource	Competency Dimension
<p>Rights-based Approaches to Social Work</p> <p>Androff, D. (2016). <i>Practicing rights: Human rights-based approaches to social work practice</i>. London, UK: Routledge.</p> <p>Human rights are relevant to every field of social work practice yet are rarely explicitly identified or applied in practice. This exercise explores principles of human rights-based approaches and gives students the opportunity to apply human rights principles to their field work. This enables them to reframe social work practice in human rights terms. Students will grasp the connection between social work practice and human rights and gain ideas about how to advance human rights through and within social work practice.</p> <p>Identify a social work intervention, practice, program, or policy from your field setting. Define and describe the intervention.</p> <p>Review the five principles of rights-based approaches and describe them and their connection to social work. See Chapter 2, specifically pp. 33–45, for detailed descriptions of the following principles:</p> <ul style="list-style-type: none"> ● Human dignity (respecting self-determination, seeing people as rights-holders); ● Nondiscrimination (preventing discrimination, promoting inclusion, remedying historical oppression and exclusion, nonhierarchical practice); ● Participation (incorporating meaningful participation in decision making, building capacity for participation); ● Transparency (assessment of human rights violations, access to information, research, and evaluation); ● Accountability (advocacy, accountability, community education, and outreach). <p>Assess the intervention in terms of these five principles. Does the intervention qualify as a rights-based approach? Does it encompass each of the five principles? Why or why not? If not, how can the intervention be modified to become a rights-based approach?</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p>

APPENDIX 3A: HUMAN RIGHTS AS A FRAME FOR POLICY PRACTICE

Adapted from E. Reichert (2006), *Understanding human rights*. Thousand Oaks, CA: SAGE.

Eleanor Roosevelt (1948) said,

Where, after all, do universal rights begin? In small places, close to home, so close and small that they cannot be seen on any maps of the world. Yet they are the world of the individual person; the neighborhood he lives in; the school or college he attends; the factory, farm or office where he works. Such are the places where every man, woman, and child seeks equal justice, equal opportunity, equal dignity without discrimination. Unless these rights have meaning there, they have little meaning anywhere. Without concerned citizen action to uphold them close to home, we shall look in vain for progress in the larger world.”

The NASW Code of Ethics (2017) includes the following mission statement:

The primary mission of the social work profession is to enhance human well-being and help meet the basic human needs of all people, with particular attention to the needs and empowerment of people who are vulnerable, oppressed, and living in poverty.

Keeping in mind these statements, consider the concept of *human dignity*. Make two columns on the sheet of paper. In one column, list the qualities necessary to fully develop as human beings. In the other column, list the rights needed to develop or protect those qualities. For example:

QUALITIES	RIGHTS
a. ability to reason	a. freedom of speech
b. need for healthcare	b. guarantee of medical treatment
c.	c.
d.	d.
e.	e.

After completing your lists, discuss the following questions:

- 1) What does it mean to be fully human? How is that different from just “being alive” or “surviving”?
- 2) Based on your lists, what needs do people have to live in dignity?
- 3) Under any circumstances, can or should any of the listed human rights be taken from us?
- 4) If you had to give up one or two of the human qualities or rights on your list, which would they be, and what would be the effect?
- 5) Compare your list with the rights identified in the articles of the Universal Declaration of Human Rights. What rights are missing from either document? How might you modify your list, or how might you modify the Universal Declaration of Human Rights?

APPENDIX 3B: THEORIES OF JUSTICE: CLASS DEBATE

Contributed by Jocelyn Clare R. Hermoso

Select and research one of the four contemporary justice theories: utilitarianism, egalitarianism, libertarianism, and communitarianism. Use the following:

Arneson, R. (2002). Egalitarianism. In *The Stanford Encyclopedia of Philosophy*. Retrieved from <https://plato.stanford.edu/>

Beckert, J. (2006). Communitarianism. In *International encyclopedia of economic sociology* (p. 81). London, UK: Routledge.

Boaz, D. (1999). *Key concepts of libertarianism*. Cato Institute. Retrieved from <https://www.cato.org/publications/commentary/key-concepts-libertarianism>.

Rosen, F. (2003). *Classical utilitarianism from Hume to Mill* (p. 132). London, UK: Routledge.

As a group, analyze the social problem of economic inequality according to your selected justice theory. On what basis can a justice claim be made (needs, rights, or deserts) for addressing poverty and inequality? From your own justice theory, how should resources for poverty reduction be allocated and

distributed? Which ought to be the primary entity for reducing poverty and working for social equity: government, the private sector, or another entity?

Class Debate Guidelines and Format

- 1) The debate will start by having each group state their position on poverty reduction according to its justice perspective. Each group will be given 5 minutes to articulate its position. The following are guidelines for putting together a statement:
 - State your justice theory's perspective about poverty. On what basis can a justice claim be made on poverty reduction?
 - State your position on how resources for poverty reduction should be allocated according to your justice perspective. Who should be primarily responsible for allocating such resources: the state, the market, civil society, or a combination of any of these sectors? How should the allocation scheme be funded?
 - State the rationales behind your statements. Use examples to substantiate your statement. Explain how your proposed schemes satisfy the justice claims of all stakeholders.
- 2) The format of the debate shall be as follows: (a) utilitarians, (b) egalitarians, (c) libertarians, and (d) communitarians.
- 3) After each group has presented, time will be given for rejoinders for each group. The groups will then be given a chance to respond to the rejoinders.
- 4) To wrap up the debate, each group will be asked to give concluding statements.

APPENDIX 3C: HUMAN RIGHTS POLICY CRITIQUE

Student teams select one of the declarations, conventions, or resolutions of the United Nations (e.g., UN Convention on the Rights of the Child, UN Convention on the Rights of Persons with Disabilities). Student teams should also identify and review other sources relevant to their selected convention

to understand the historical context, ratification history, and arguments for each of the conventions.

- 1) Identify the document you are presenting and provide an overview of the context for the development of the document. For example, what international circumstances brought about the development of document? What countries were involved in giving attention to the need for the document, and why did they push for it? What countries were represented in the group that drafted the document? Who were the champions for the document?
- 2) When was the document developed, and what are its major provisions?
- 3) What is the status of the document? Which countries signed and ratified the document, and which countries have signed but not yet ratified it? What are the major reservations, if any, by those opposed to the documents? Include both U.S. and international reservations (if any). In your discussion of the reservations, identify particular countries and their specific reservations to the document.
- 4) What are your critiques of the document? Are there ways that it could be strengthened to better protect human rights?
- 5) Identify and describe at least one current example of a global situation (you may include a U.S. issue) where the rights discussed in the document are currently being violated. Offer good background and details about the issue. Be specific.
- 6) What are the social justice implications for social workers that stem from this document? What, specifically, should social workers do in light of the guidelines set forth in this document?
- 7) Provide a handout for your classmates on the document



Competency 4:

Engage in Practice-informed Research and Research-informed Practice

SPECIALIZED PRACTICE COMPETENCY DESCRIPTION

Macro practitioners recognize environmental, sociocultural, and historical factors that affect the inclusion of underrepresented populations in research and understand how this research enhances service delivery and contributes to broader knowledge building within social work practice. In collaboration with key program stakeholders and those directly affected by social problems, macro practitioners build culturally informed knowledge to promote human rights and social justice for vulnerable and oppressed populations. Macro social workers understand that many types of evidence, from personal narrative to analysis of large data sets, inform the development, analysis, and critique of social policies and interventions. They use a wide range of research methods, including logic, scientific inquiry, and culturally informed and ethical approaches, to develop effective responses to social, economic, political, and environmental challenges and to shape policies and programs. They recognize that research is not value free and that biases can skew programs and policies. They communicate research-based arguments to inform policies and programs and translate research findings into actionable planned change efforts and policies. Macro social workers understand that defining, conducting, and presenting research findings and their implications includes political and resource considerations.

COMPETENCY BEHAVIORS

Social workers in macro practice

- engage in critical analysis and ongoing review of research findings, macro practice models, and practice wisdom to inform organizational, community, and policy practice;
- develop and select research questions that strategically inform the research process and its impact on communities, programs, organizations, and policies;
- identify, critically evaluate, and use data and scholarship to build new knowledge and inform the development, implementation, and evaluation of social policy and community and organizational programs;
- consciously integrate the voices and experiences of those directly affected by social, economic, and political inequality throughout the research process, recognizing the differences in conducting research with, research by, and research on an organizational or community entity;
- collaborate, mobilize, and organize constituents, stakeholders, and colleagues to engage in research for advocacy, policy making, program design, and evaluation, and the dissemination of research findings to improve policies, programs, services, and interventions; and
- identify anticipated obstacles and opposition to the conduct and dissemination of research, including ethical, political, and economic dilemmas.

CURRICULAR RESOURCES MAPPED TO COMPETENCY DIMENSIONS

Readings

Resource	Competency Dimension
ARTICLES	
Barends, E., Rousseau, D. M., & Briner, R. B. (2014). Evidence-based management: The basic principles. Retrieved from https://www.cebma.org/wp-content/uploads/Evidence-Based-Practice-The-Basic-Principles-vs-Dec-2015.pdf	Knowledge Values
Branom, C. (2012). Community-based participatory research as a social work research and intervention approach. <i>Journal of Community Practice, 20</i> (3), 260–273.	Knowledge Values Skills
Cashman, S. B., Adeky, S., Allen, A. J. III, Corburn, J., Israel, B. A., Montaña, J., . . . Eng, E. (2008). The power and the promise: Working with communities to analyze data, interpret findings, and get to outcomes. <i>American Journal of Public Health, 98</i> (8), 1407–1417.	Knowledge Values Skills
Hoefler, R., & Chigbu, K. (2015). The Motivation and Persuasion Process (MAP): Proposing a practice model for community intervention. <i>Journal of Community Practice, 23</i> (1), 51–75.	Knowledge Values Skills
Massey, S. G., & Bereras, R. E. (2013). Introducing impact validity. <i>Journal of Social Issues, 69</i> (4), 615–632.	Knowledge Values Skills
Sandoval, G., & Rongerude, J. (2015). Telling a story that must be heard: Participatory indicators as tools for community empowerment. <i>Journal of Community Practice, 23</i> (304), 403–414.	Knowledge Values Cognitive and Affective Processes
Silverman, R. M., Yin, L., & Patterson, K. L. (2017). Siting affordable housing in opportunity neighborhoods: An assessment of HUD's affirmatively furthering fair housing mapping tool. <i>Journal of Community Practice, 25</i> (2), 143–158.	Knowledge, Values, Skills

(continued)

Readings (continued)

Resource	Competency Dimension
Stanhope, V., & Dunn, K. (2011). The curious case of Housing First: The limits of evidence based policy. <i>International Journal of Law and Psychiatry</i> , 34, 275–282.	Knowledge Values Skills
Turner, M. (2013). Evidence-based policymaking requires a portfolio of tools. Testimony Submitted for the Record to the Subcommittee on Human Resources Committee on Ways and Means United States House of Representatives. Available at http://www.urban.org/UploadedPDF/904598-evidence-based-policy_making.pdf .	Knowledge Skills
BOOK CHAPTERS	
Brady, S. R. (2016). Utilizing the Delphi method in community-based participatory research. In L. A. Jason & D. S. Glenwick (Eds.), <i>Handbook of methodological approaches to community-based research: Qualitative, quantitative, and mixed methods</i> . (pp. 61- 92). New York, NY: Oxford Press.	Knowledge Skills
Kettner, P. M., Moroney, R. M., & Martin, L. L. (2016). Selecting the appropriate intervention strategy. In <i>Designing and managing programs: An effectiveness-based approach</i> . (pp. 89-106). Thousand Oaks, CA: SAGE.	Knowledge Values Skills Cognitive and Affective Processes
Ohmer, M. L., Sobek, J. B., Teixeira, S. N., Wallace, J. M., & Shapiro, V. L. (2012). Community-based research: Rationale, methods, roles and considerations for community practice. In M. Weil, M. Reisch, & M. L. Ohmer (Eds.). <i>The handbook of community practice</i> (2nd ed., pp. 791-807). Thousand Oaks, CA: SAGE.	Knowledge, Values, Cognitive and Affective Processes
Shdaimah, C. S., Stahl, R. W., & Schram, S. F. (2011). Becoming an anti-oppressive researcher. In S. Strega & L. Brown (Eds.), <i>Research as resistance: Revisiting critical, indigenous, and anti-oppressive approaches</i> (pp. 17–41). New York, NY: Columbia University Press.	Knowledge Values
BOOKS	
Chilisa, B. (2011). <i>Indigenous research methodologies</i> . Thousand Oaks, CA: SAGE.	Knowledge Values Cognitive and Affective Processes

(continued)

Readings (continued)

Resource	Competency Dimension
Friedman, M. (2015). <i>Trying hard is not good enough: How to produce measurable improvements for customers and communities</i> . Middletown, DE: Fiscal Policy Studies Institute (FPSI) Publishing.	Knowledge Values Skills Cognitive and Affective Processes
Mikkelsen, B. (2005). <i>Methods for development work and research: A new guide for practitioners</i> (2nd ed.). Thousand Oaks, CA: SAGE.	Knowledge Values Skills Cognitive and Affective Processes
Nair, M. D., & Guerrero, E. G. (2014). <i>Evidence based macro practice in social work</i> . Wheaton, IL: Gregory Publishing.	Knowledge Values Skills Cognitive and Affective Processes
Roberts-DeGennaro, M., & Fogel, S. J. (2011). <i>Using evidence to inform practice for community and organizational change</i> . Chicago, IL: Lyceum Books.	Knowledge Values Skills Cognitive and Affective Processes

Media

Resource	Competency Dimension
Best Practices Library, University of San Diego: http://digital.sandiego.edu/npi-bpl/	Knowledge Skills
Briner, R. What is evidence-based management and why do we need it?: https://www.youtube.com/watch?v=nwK7lgmygBc&list=PLFTAyPV7H-paw_JofySjeCym1bp2E3ZQc&index=1	Knowledge

(continued)

Media (continued)

Resource	Competency Dimension
Information for Practice: To help social service professionals throughout the world conveniently maintain an awareness of news regarding the profession and emerging scholarship: http://ifp.nyu.edu/	Knowledge Skills
Community Toolbox: Conducting Advocacy Research: https://ctb.ku.edu/en/table-of-contents/advocacy/advocacy-research	Knowledge Skills
Research for Organizing Toolkit: This toolkit is designed for organizations and individuals that want to use participatory action research (PAR) to support their work toward social justice. In this toolkit you will find case studies, workshops, worksheets, and templates that you can download and tailor to meet your needs. See in particular the section on Community Mapping. www.researchfororganizing.org	Knowledge Skills
Critically Appraised Topic Manager (CAT) app, available for download on iPhone and Android: https://www.cebma.org/resources-and-tools/cat-manager-app/	Knowledge Skills Cognitive and Affective Processes

In-Class Exercises

Resource	Competency Dimension
<p>Program Design Activity</p> <p>Read the following chapter before class: Kettner, P. M., Moroney, R. M., & Martin, L. L. (2016). Selecting the appropriate intervention strategy. In <i>Designing and managing programs: An effectiveness-based approach</i> (pp. 89–104). Thousand Oaks, CA: SAGE.</p> <p>Based on your work on the <i>System of Care Analysis</i>,</p> <ul style="list-style-type: none"> ● How would you create a hypothesis for a (new) program to meet the gaps in services you have identified? ● What variables would you measure? Why? 	Knowledge, Values Cognitive and Affective Processes

Assignments	
Resource	Competency Dimension
<p>Community or Neighborhood Analysis to Inform Research</p> <p>Students gather data for a neighborhood assessment.</p> <p>See Appendix 4C.</p> <p>Research Proposal and Study</p> <p>Students work as a group with community partners to plan, develop, and implement their research project (e.g., focus groups or interviews with community residents). This consists of the following: finalizing the research instrument, developing a recruitment plan, recruiting participants, and collecting and transcribing the data.</p> <p>See Appendix 4D.</p> <p>Community-based Participatory Action Research, Final Paper and Presentation</p> <p>Students present their findings in class to one another and their community partners. They may also present their findings in the community to relevant community stakeholders, residents, and other individuals and groups identified with the community partners.</p> <p>See Appendix 4E for instructions.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Turn the Curve for Result-based Accountability</p> <p>This assignment gives students hands-on experience with using data and telling a story with data for result-based action plans.</p> <p>See Appendix 4B.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Grand Challenges Assignment</p> <p>Students complete a group project and presentation based on research into one of the 12 Grand Challenges and how it applies in their local area: http://aaswsw.org/grand-challenges-initiative/</p> <p>See Appendix 4F.</p>	<p>Knowledge</p> <p>Skills</p>

<i>Field Activities</i>	
Resource	Competency Dimension
<p>Performance Management and Measurement Assignment</p> <p>It has been argued that performance information use remains one of the most important yet elusive issues in performance management. In this assignment, you will explore this issue within your field organization.</p> <p>Answer the following questions to the best of your ability. You will probably want to consult with knowledgeable employees within the organization.</p> <ul style="list-style-type: none"> ● How is organizational effectiveness defined in the field organization? ● How is performance effectiveness measured in the organization? ● What kinds of performance data are collected? ● What kinds of resources are available for measuring performance and collecting evidence? ● How are supervisors or managers involved in promoting and engaging in evidence-informed practice? ● How do managers use performance information? ● If relevant, what limits your managers' use of performance information? 	<p>Knowledge</p> <p>Values</p> <p>Skills</p>

APPENDIX 4A: COMMUNITY PRACTICE METHODS ACTIVITY

Read the following articles before class:

- Sandoval, G., & Rongerude, J. (2015). Telling a story that must be heard: Participatory indicators as tools for community empowerment. *Journal of Community Practice, 23*(3–4), 403–414.
- Hofer, R., & Chigbu, K. (2015). The Motivation and Persuasion Process (MAP): Proposing a practice model for community intervention. *Journal of Community Practice, 23*(1), 51–75.
- Silverman, R. M., Yin, L., & Patterson, K. L. (2017). Siting affordable housing in opportunity neighborhoods: An assessment of HUD's affirmatively furthering fair housing mapping tool. *Journal of Community Practice, 25*(2), 143–158.

In small groups, students should identify the benefits and challenges of using each distinct practice model or tool and address the following questions:

- In what ways do these tools or practice methods help promote input from local communities into advocacy, policy making, and program design and evaluation?
- What new knowledge about key social problems can these tools or practice methods help provide?

APPENDIX 4B: TURN THE CURVE FOR RESULT-BASED ACCOUNTABILITY

Baseline

Each group of students secures data from an online city database (i.e., Baltimore Neighborhood Indicators Alliance, bnia.org) for an assigned community focus (i.e., clean, green, safe, vibrant) for designated neighborhoods. Each group plots baseline and trend data for the neighborhoods.

Story Behind the Baseline

Each group considers the causes and forces at work. Why do the data look the way they do? What might account for the results? What is their forecast, and what questions do they have about causes?

What Works (What Would It Take)?

Groups consider what could work better. Are there partners who could contribute? What no-cost or low-cost ideas could be tried? Develop a list of questions about what works.

APPENDIX 4C: COMMUNITY-BASED PARTICIPATORY ACTION RESEARCH: NEIGHBORHOOD ASSESSMENT AND ANALYSIS PAPER AND PRESENTATION

Students will work in small groups to gather historical and current data on socioeconomic characteristics, historical events, and current issues in the

targeted neighborhood. Groups are formed to research the key areas identified as important by the community partners. For example, groups may be formed around the following subject areas: (1) education, employment, and business development; (2) health and wellness (e.g., chronic diseases, child and maternal health); or (3) housing and community development (e.g., home ownership rates, vacancy, blight, housing and commercial development). Your analyses will inform your research study.

For this assignment, each group of students will write a preliminary neighborhood assessment and analysis and give a 15- to 20-minute presentation on their findings in class to one another and to your community partners for this project.

Please use the following format to submit your neighborhood assessment. The reference list and appendices should be on separate pages at the end. The paper should be in APA format, approximately 8–10 pages (not including the references and appendices). Your paper must be double-spaced, using 12-point New Times Roman font and 1-inch margins.

- 1) Briefly give an overview of major developments and changes in the neighborhood over the past 30–35 years in the specific area you selected.
- 2) Gather and summarize information and data relevant to the specific area you selected (e.g., education, employment, health data, housing, vacancy data). Gather information and data on neighborhood strengths and challenges in this area. You may also need to conduct a walking tour or windshield survey to assess your specific area and speak to neighborhood stakeholders or external organizations to gather these data and other relevant information.
- 3) Develop a table illustrating the data over time (e.g., going back as far as you can in the past 10–20 years, depending on the availability of the data).
- 4) Analyze and summarize how these data and the other information you've collected inform the areas and issues you researched and the study you will conduct for this class.

APPENDIX 4D: COMMUNITY-BASED PARTICIPATORY ACTION RESEARCH: RESEARCH PROPOSAL AND STUDY

Students work as a group with community partners to plan, develop, and implement a community-based participatory research project in the selected neighborhood. This consists of engaging community partners in their research and working with them to finalize the research methods, which are informed by the issues students researched for the neighborhood assessment and analysis exercise in Appendix 4C. For this project students work with community partners to develop and finalize the data collection instruments and recruitment plan and conduct the study, including recruiting participants.

Students submit a research proposal summarizing and discussing the following areas: a description of the community and partner organizations, a review of the literature on the specific problems or issues you researched for your neighborhood analysis, and a description of the community-based research partnership process and the methods.

Students use the following format to submit their research proposal. The reference list and appendices should be on separate pages at the end. The proposal should be in APA format, approximately 10–15 pages (not including the references and appendices), double spaced, using 12-point New Times Roman font and 1-inch margins. You will work as a group on this paper and submit one proposal; however, all students must take responsibility for writing the proposal.

1) Introduction (work as a class on this section)

- Describe the community, the issues that the research addresses, and the population affected by problem.
- Briefly state how your research investigates the issues and how using community-based participatory research (CBPR) advances research in this area.
- Briefly discuss how you are collaborating with neighborhood partners on this research and how it benefits the work they are doing in the community.

2) Literature review (work in your small groups on this section) (35 points)

Each group will provide a synopsis of the relevant literature, particularly as it relates to your specific research area and previous CBPR that has been used to examine these issues. Conceptual articles that highlight the importance of the issues and your research methods are also important to include, particularly if there is limited research in your area. Summarize and explain how the studies reviewed are related to your research, including the following:

- An introductory paragraph that introduces the previous research you've found (e.g., "There is limited research on [issues]"; "Previous research has demonstrated that . . ."). This paragraph very briefly summarizes the status of previous research on your issue area and introduces the literature review.
- Summarize previous research outlined in the articles, including the issues addressed, the research methods used (including the sample), and key findings. Please integrate findings from studies that are on similar topics (e.g., discuss these studies together).
- A paragraph at the end summarizing the key findings from previous research as they relate to the issues examined in your research and how previous research informs your research. Discuss how your research refines, revises, or extends existing knowledge from previous research. Describe the significance of your research and how it contributes to CBPR in this area and to disadvantaged communities, including Homewood.

3) Research methods (work as a class on this section) (40 points)

Community partner engagement strategies

- Describe CBPR strategies for engaging community partners in your research.
- Discuss how this research supports the work of your community partners.

Sampling procedures

- Describe the population from which the sample will be drawn (e.g., sociodemographic profile of the neighborhood from your neighborhood assessment) and the sampling strategy (e.g., indicate how you will choose the sample and any inclusion or exclusion criteria, such as demographics or other population characteristics that you want to include or exclude from your sample).
- Estimate the number of respondents in your sample. Estimate how many residents you hope to interview over the course of this project.

Data collection procedures

- *Procedures and methods:* Describe the specific procedures and methods you will use to collect the data, including how you will recruit the participants, where you will conduct data collection task, and engagement strategies.
- *Informed consent:* Describe consent procedures and how they will be conducted.

Instruments

- Describe your data collection instrument. Provide a draft copy of your instrument or guide in the appendix. Indicate how you will gather demographic and background information on participants.
- Describe how you will analyze your data.

4) References in APA format (work as a class on this section) (5 points)

- Headings, subheadings, tables, appendices, and so on must be in APA format.
- In-text references and the reference list at the end must be in APA style.

5) Appendices (work as a class on this section) (5 points)

- Informed consent form or language providing for consent
- Draft instrument guide
- Memorandum of understanding (MOU) with your community partner, outlining student and partner responsibilities for the study

**APPENDIX 4E:
COMMUNITY-BASED PARTICIPATORY ACTION RESEARCH:
RESEARCH PAPER INSTRUCTIONS**

Please use the following format to submit your research paper. The reference list and appendices should be on separate pages at the end.

1) Introduction (5 points)

- Describe the purpose of your project and the intended outcomes. Describe the community where you conducted your focus groups.
- Briefly describe the methods you used (e.g., neighborhood assessment and focus groups).

2) Community partners and CBPR principles and goals (10 points)

- Describe the partners you engaged for this project, including their mission, major programs, and how this project contributed to their mission and overall goals.
- Select three CBPR principles and goals that you believe were furthered in your project and three that you believe could have been stronger, particularly in relation to engagement with your community partners (note: use Branom, 2012).
- What recommendations do you have for future engagement with community partners in projects like this one?

3) Research methods (15 points)

Recruitment strategies and participants

- Describe the recruitment strategies you used to engage residents in your research. What did your group do? What did your partners do? Where did you collect your data? How accessible do you believe this location was for study participants?
- Describe your participants: How many participated? Summarize the data on your participants from the background information sheet.

Data collection procedures

- Describe how you collected the data for your focus groups.
- How were your data collection instruments developed? What was the process? Would you change any of the questions based on the results of your study?
- What would you do differently? Would you change anything about how your data collection process was structured?
- What other recommendations do you have for future CBPR studies?

4) Partner materials (30 points: completed)

Materials will be developed for each of the main areas you assessed for your neighborhood analysis and community research project. These materials will include the following:

- Overview of your project and methods used to conduct your neighborhood assessment and study.
- Individual overview of the key findings from your neighborhood assessment
- Overview of the key findings from your literature review
- Findings from your study related to your topic area

- Community resources related to your topic area.
- Elements on each handout (tables, figures, graphs, etc., and brief summaries)

5) Overall results (20 points)

- Describe how you analyzed your data.
- Provide a brief overall summary of the results of your study.
- Discuss each of the key findings and themes, describing them in detail and providing support for each of your key themes.
- Critically analyze and compare and contrast the themes and results.

6) Summary and conclusion (15 points)

- Summarize the overall results from your study.
- Discuss how your results inform, extend, or contribute to the literature you reviewed in your proposal.
- Provide recommendations for engaging residents around these issues in the future, including recommendations for your community partners related to their mission, goals, programs, and so on.
- Assess your own and your group members' contributions to the project (using the attached assessment form).
- Each student: Describe and assess your contributions to the project (approximately 2–3 paragraphs).
- What CBPR, practice, or organizing roles did you play? How did you play these roles? What tasks did you work on that fit under these roles? How comfortable were you playing these roles?
- What CBPR, practice, or organizing skills did you learn by doing this project?

APPENDIX 4F: GRAND CHALLENGES ASSIGNMENT

Group Project and Presentation

Students will create a semester-long project about the 12 Grand Challenges of Social Work initiative. This is an opportunity for community-level advocacy. Groups will investigate how the selected challenge affects their local area. The project involves academic research and interviewing community social service agency representatives. Students will create an APA-style research paper and professional poster based on their research. The research will be presented in a colloquium to the faculty and other committee members. After the presentation students will complete a process evaluation of their participation in the project.

- 12 Grand Challenges paper: As a group, students will select 1 of the 12 Grand Challenges. Based on the scholarly literature, students will write a 10- to 15-page paper on the current state of knowledge on the specific social problem the challenge addresses. Information should include national, state, regional, and local data.
- 12 Grand Challenges poster: Students will create a 27-inch × 32-inch poster on the major research findings on the social problems associated with the selected Grand Challenge (e.g., Smart Decarceration, Social Isolation). The poster must include the following sections: Introduction, Objectives, Methods, Results, Conclusions, and References.
- Group presentation: As a group, students will present their findings in a colloquium to faculty, students, and, if possible, community and agency members. Each group should plan on a 30-minute presentation with time for questions and answers.
- Process evaluation: Each student will complete a process evaluation that addresses three components of the planned change process: Engagement and Assessment, Intervention, and Evaluation, covering the elements of the planned change process.



Competency 5

Engage in Policy Practice

SPECIALIZED PRACTICE COMPETENCY DESCRIPTION

Social workers in macro practice examine how historical, political, social, economic, and cultural factors shape the policy environment and use this knowledge to recognize and capitalize on opportunities for reform that advance human rights; racial and gender equity; access to high-quality, comprehensive social welfare services; and social, economic, and environmental justice. Macro practitioners appreciate the complexity of policy issues; understand legislative, executive, and judicial policy-making processes; and critically analyze the varied dimensions of power as they affect individuals, families, groups, organizations, and communities. Macro practitioners engage in policy research, development, advocacy, analysis, implementation, evaluation, and electoral politics. They devise and implement strategies at the local, state, and national levels to achieve policy goals reflecting social work values. They engage and build the capacity of affected constituencies to participate in advocacy and direct and indirect lobbying, including working through coalitions, to advance evidence-informed policies that support well-being.

COMPETENCY BEHAVIORS

Social workers in macro practice

- analyze policies at local, state, national, and international levels to assess their impact on individuals, families, groups, organizations, and communities and on the values of human rights and social, economic, and environmental justice;

- educate stakeholders about how policies affect individual well-being and the communities and organizations that support them;
- engage, motivate, and mobilize constituents to participate and even lead in the policy process;
- strategically document and disseminate information to key policymakers about unmet needs and program accomplishments by using research evidence, practice wisdom, stories of lived experience, and lenses of race, class, and gender;
- demonstrate leadership in formulating and implementing comprehensive advocacy campaigns that use carefully selected strategies and tactics;
- analyze issues, develop cogent arguments, and communicate persuasively with multiple audiences using effective written and oral formats and media platforms;
- use interpersonal communication, relationship building, group work, and organizing skills to form coalitions, lobby policymakers, engage and mobilize constituents, and leverage political capital to challenge structures of power and privilege and effect positive change;
- encourage broad-based participation in the political process through voter mobilization and educating the public about positions of candidates for office, political party platforms, the benefits of political engagement, and electoral processes and procedures;
- advocate and engage allies and supporters in lobbying activities to enhance services, increase access to resources, and ensure sustainable and equitable community development;
- participate in professional organizations, coalitions, industry, and other groups that advocate for client social justice, equity, and fairness; and
- promote an organizational culture recognizing and rewarding professionalism, diversity, high-quality consumer service, and employee engagement and empowerment.

CURRICULAR RESOURCES MAPPED TO COMPETENCY DIMENSIONS

Readings

Resource	Competency Dimension
ARTICLES	
Bird, M. (2015). Social justice advocacy in the belly of the beast: An illustration of policy change for social work. <i>Affilia: Journal of Women and Social Work</i> , pp. 1-6.	Knowledge Skills
Board Source. (2002). <i>The Sarbanes–Oxley Act and implications for nonprofit organizations</i> . The Urban Institute. Retrieved from http://hstrial-mphillips5.homestead.com/ResourceLibraryPages/ResourceLibraryFiles/Nonprofit_Governance_and_the_Sarbanes-Oxley_Act.pdf	Knowledge Values Cognitive and Affective Processes
Byers, K. (2014). Reemergence of policy practice: A journey back to our roots. <i>Advances in Social Work</i> , 15(1), 34–50.	Knowledge Values
Fyall, R., & Allard, S. W. (2017). Nonprofits and political activity: A joint consideration of the political activities, programs, and organizational characteristics of social service nonprofits. <i>Human Service Organizations: Management, Leadership & Governance</i> , 41, 1–26.	Knowledge Values Cognitive and Affective Processes
Guo, C., & Saxton, G. D. (2012). Tweeting social change: How social media are changing nonprofit advocacy. <i>Nonprofit and Voluntary Sector Quarterly</i> .	Knowledge Skills
Institute for Women’s Policy Research. (2017). <i>Five ways to win an argument about the gender wage gap</i> . Retrieved from https://iwpr.org/wp-content/uploads/wpallimport/files/iwpr-export/publications/C447.pdf	Knowledge Skills
Mason, E., Williams, A., & Elliott, K. (2017) <i>The dramatic rise, in state efforts to limit LGBT rights</i> . Retrieved from https://www.washingtonpost.com/graphics/national/lgbt-legislation/?utm_term=.f925797cb710	Knowledge Values
Rosenberg, J., Steuerle, C. E., & Toran, K. (2013). <i>What does the fiscal cliff deal mean for nonprofits?</i> Urban Institute. Retrieved from https://www.urban.org/sites/default/files/publication/23236/412732-what-does-the-fiscal-cliff-deal-mean-for-nonprofits-.pdf	Knowledge Values Cognitive and Affective Processes

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Readings (continued)

Resource	Competency Dimension
Weiss-Gal, I. (2013). Policy practice in practice: The inputs of social workers in legislative committees. <i>Social Work, 58</i> (4), 304–313.	Knowledge
Weiss-Gal, I. (2017). What options do we have? Exploring routes for social workers' policy engagement. <i>Journal of Policy Practice, 16</i> (3), 247–260.	Knowledge
Wong, S. C. Y. (2011). Boards: When best practice isn't enough. McKinsey. Retrieved from https://www.mckinsey.com/global-themes/leadership/boards-when-best-practice-isnt-enough	Knowledge Values Cognitive and Affective Processes
BOOK CHAPTERS	
Fauri, D. P., Netting, E. F., & O'Connor, M. K. (2005). Gun control advocates: Staying on the public agenda. In <i>Social Work Macro Practice Workbook</i> (pp. 85–86). Belmont, CA: Thomson.	Knowledge Skills
Mullaly, R. (2007). Working outside and (against) the system. In <i>The new structural social work: Ideology, theory & practice</i> (3rd ed., pp. 331–362). New York, NY: Oxford University Press.	Knowledge Values
Rome, S. H., & Kiser, S. (2016). Lobbying. In <i>Encyclopedia of social work</i> . Washington, DC: NASW Press & Oxford University Press. Available at http://socialwork.oxfordre.com/	Knowledge Values Skills
BOOKS	
Avner, M. (2002). <i>The lobbying and advocacy handbook for nonprofit organizations: Shaping policy at the state and local level</i> . New York, NY: Fieldstone Alliance/Turner Publishing.	Knowledge Cognitive and Affective Processes
Bardach, E. (2012). <i>A practical guide for policy analysis: The eightfold path to more effective problem solving</i> (4th ed.). Thousand Oaks, CA: SAGE.	Knowledge Skills
Chambers, D. E., & Bonk, J. F. (2013). <i>Social policy and social programs: A method for the practical social policy analyst</i> (6th ed.). Boston, MA: Pearson.	Knowledge Values Skills
Lane, S., & Pritzker, S. (2018). <i>Political social work: Using power to create social change</i> . New York, NY: Springer International.	Knowledge Values Skills

<i>Media</i>	
Resource	Competency Dimension
<p><i>Business of Being Born</i> (85 minutes): Compelled to find answers after a disappointing birth experience with her first child, actress Ricki Lake recruits filmmaker Abby Epstein to explore the maternity care system in America.</p> <p>http://www.filmsforaction.org/walloffilms/ https://youtu.be/lr6F7aljxxI http://www.thebusinessofbeingborn.com</p>	Knowledge
<p><i>Broken Child</i> (62 minutes): This documentary explores what happens when programs and policies to assist families in need are lacking. It focuses on child abuse and neglect, mothers who use drugs while pregnant, and parents challenged by living in violent neighborhoods. (Copyrighted documentary uploaded to YouTube by Child Advocacy Channel at https://youtu.be/g1FMYPtwUII)</p>	Knowledge Cognitive and Affective Processes
<p>Center on Budget Policies and Priorities, <i>Introduction to the Federal Budget Process</i>.</p> <p>http://www.cbpp.org/research/policy-basics-introduction-to-the-federal-budget-process</p>	Knowledge Skills
<p>CSPAN, <i>Aparna Mathur and Isabel Sawhill on Paid Family Leave</i></p> <p>https://www.c-span.org/video/?429860-4/washington-journal-aparna-mathur-isabel-sawhill-discuss-paid-family-leave</p>	Knowledge Values
<p>CSPAN, <i>Social Security and How the SSA "Sold" the Program to the Public</i> (18 minutes)</p> <p>http://www.c-span.org/video/?321616-1/reel-america-social-security-1952</p>	Knowledge Values
<p>Grand Challenges recommendations: <i>End Homelessness Grand Challenge Policy Brief</i></p> <p>https://csd.wustl.edu/Publications/Documents/PB6.pdf</p> <p>May 22, 2017, Grand Challenges Webinar: <i>Ending Homelessness</i></p> <p>https://www.youtube.com/watch?v=Q5S-0wGZHFU&feature=youtu.be</p>	Knowledge Values
<p><i>Hull House Closing</i></p> <p>http://www.npr.org/2012/01/27/145950493/jane-addams-hull-house-to-close</p>	Knowledge Values Cognitive and Affective Processes

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Media (continued)

Resource	Competency Dimension
<i>Lego People Explain the Iowa Democratic Caucus</i> https://www.youtube.com/watch?time_continue=6&v=SJqv--jyXPg .	Knowledge Values
NASW (2007), <i>Institutional racism & the social work profession: A call to action</i> (pp. 3–21). https://ncwwi.org/files/Cultural_Responsiveness___Disproportionality/Institutional_Racism_and_the_Social_Work_Profession.pdf	Knowledge Values
Naomi Klein, <i>Anti-Union and Budget Crises and Shock Doctrine</i> (12 minutes). https://www.youtube.com/watch?v=60StkQk7Y94	Knowledge Values
U.S. Department of Labor Wage & Hour Division, <i>Know Your Rights</i> videos www.dol.gov/whd/resources/kyrvideo.htm	Knowledge Values

In-Class Exercises

Resource	Competency Dimension
Think Tank Activity This group assignment introduces students to the role of think tanks through a critical analysis of their websites and social media presence. See Appendix 5C .	Knowledge Skills
“The Light of Day” Strikes Again: Legislator Profile This exercise asks students to analyze legislators’ websites to draw conclusions about their likely policy positions. See Appendix 5D .	Knowledge Values Skills
Comparing Policy Analysis Frameworks This assignment involves analyzing and assessing several different policy frameworks. See Appendix 5E .	Knowledge Values Skills
Policy Development Exercise Students apply the elements identified in Chambers and Bonk (2013) to better understand a proposed policy solution. See Appendix 5F .	Knowledge Skills

(continued)

In-Class Exercises (continued)

Resource	Competency Dimension
<p>Advocacy Policy Role Play</p> <p>This advocacy role play activity develops students' ability to influence stakeholders.</p> <p>See Appendix 5G.</p>	<p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Case Vignette: Organizational Development</p> <p>This exercise focuses on internal policy aspects of an agency as it grows and how to choose its mission, goals, and objectives.</p> <p>See Appendix 5A.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p>
<p>Historical Policy Analysis</p> <p>In this exercise, students conduct research on an existing or proposed policy and discuss their sources of information.</p> <p>See Appendix 5H.</p>	<p>Knowledge</p> <p>Cognitive and Affective Processes</p>
<p>Case Vignette: ABC Agency</p> <p>This exercise focuses on ethical issues associated with budgeting priorities.</p> <p>See Appendix 5B.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p>

Assignments

Resource	Competency Dimension
<p>Agency Advocacy Plan</p> <p>Using <i>The Lobbying and Advocacy Handbook for Nonprofit Organizations</i> (Avner, 2002) and <i>The Lobbying Strategy Handbook</i> (Libby P. & Associates, 2012) adapt worksheets and strategies therein to develop an advocacy plan.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Agency Public Policy Readiness Assessment</p> <p>Using Worksheet 1, "Public Policy Readiness Inventory" (Avner, 2002), conduct a readiness assessment of your field agency or of an organization you have worked for.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

(continued)

Assignments (continued)

Resource	Competency Dimension
<p>Develop Volunteer Manual</p> <p>Requires students to research applicable law and create a volunteer manual for use with a nonprofit organization.</p> <p>See Appendix 5I.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p>
<p>Develop HR Training Video Resource</p> <p>Using information contained in the volunteer manual, create a video resource to assist in onboarding volunteers to the organization.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Hearing Analysis</p> <p>Requires students to attend a legislative hearing and think strategically about what they witnessed.</p> <p>See Appendix 5L.</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>
<p>Legislative Proposal Assessment</p> <p>Students identify a bill and fill out a form detailing its many aspects.</p> <p>See Appendix 5N.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Agency Public Policy Readiness Assessment</p> <p>Using Worksheet 1, “Public Policy Readiness Inventory” (Avner, 2002), conduct a readiness assessment of your field agency or of an organization you have worked for.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Agency Advocacy Plan</p> <p>Using <i>The Lobbying and Advocacy Handbook for Nonprofit Organizations</i> (Avner, 2002) and <i>The Lobbying Strategy Handbook</i> (Libby, P. & Associates, 2012), adapt worksheets and strategies therein to develop an advocacy plan for your field agency or an agency with which you are familiar.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

(continued)

Assignments (continued)

Resource	Competency Dimension
<p>Rural Advocacy Project</p> <p>Students will identify a problem, opportunity, issue, or policy; interview stakeholders and key constituencies; develop goals and strategies for intervention; conduct a modest intervention; and evaluate that intervention and outcome.</p> <p>Project draws on the following sources:</p> <p>Hoefler, R. (2015). <i>Advocacy practice for social justice</i> (3rd ed.). New York, NY: Oxford Press.</p> <p>Schneider, R. L., & Lester, L. (2001). <i>Social work advocacy: A new framework for action</i>. Belmont, CA: Brooks/Cole.</p> <p>See Appendix 5J.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

Field Activities

Resource	Competency Dimension
<p>Advocacy Initiative</p> <p>Participate in an advocacy initiative at your field agency that includes engaging and mobilizing community and organizational constituents (e.g., letter writing, phone call, or e-mail campaign; recruiting public testimony, mobilizing community members for a legislative visit or demonstration).</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Human Resource Analysis</p> <p>Analyze the effectiveness of your field agency's human resources policy (e.g., grievance policy) and rewrite it, along with a rationale for change.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Policy Presentation</p> <p>Research the field agency policy relating to advocacy activity and present your conclusions at a staff meeting.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

(continued)

Field Activities (continued)

Resource	Competency Dimension
<p>Legislative Debrief</p> <p>Attend a meeting of your city, county, state, or national legislature that is pertinent to the work of your field agency. Provide an update to agency staff, describing and analyzing what was addressed.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Local Government Presentation</p> <p>Make a presentation on behalf of the field agency at a city council or county commissioner meeting and report back to the agency.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>NASW Legislative Awareness</p> <p>Attend an NASW Legislative Awareness and Advocacy Day at your state capitol or the Student Advocacy Day in Washington, DC; make a lobbying visit on behalf of a cause with which your field agency is concerned.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Public Testimony</p> <p>Provide testimony at a public hearing on an issue that is relevant to your field agency.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Advocacy Initiative</p> <p>Participate in an advocacy initiative at your field agency that includes engaging and mobilizing community and organizational constituents (e.g., letter writing, phone call, or e-mail campaign; recruiting public testimony, mobilizing community members for a legislative visit or demonstration).</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

APPENDIX 5A:

CASE VIGNETTE: ORGANIZATIONAL DEVELOPMENT

Assume you are a social work administrator in an agency that has grown dramatically over the last few years. Three years ago, your staff of 20 consisted largely of former clients with much practical life experience but without formal social service training. Today, the staff is twice that size and includes both former clients and MSWs.

As the staff has grown in both size and experience, some employees (generally former clients) remain generalists, whereas others (mostly MSWs) have begun to specialize. Three years ago, case workers handled almost all case management services for clients assigned to them, and specialized services such as therapy and family crisis intervention were not available. Now both generalists and specialists may work with the same client, providing a broader range of services. The result is that multiple staff could become involved with the same client.

Although the combination of experienced former clients and professionally trained MSWs appears to be a positive shift in the agency, teamwork has now become an issue. Several problems are beginning to emerge:

- Some clients receive duplicate services.
- In other instances services are not provided at all because everyone thinks, “Someone else is doing it.”
- Occasionally staff members conflict in their decisions, confusing clients and creating ill will among staff.
- A few clients are beginning to “work the system” by seeking out someone who will give them the answers they want.
- Some conflicts appear to be emerging from different perspectives on how to address client needs; the life experiences of former clients and the professional training of MSWs seem to be at odds at times.

You know that there are many benefits to having a staff made up of both former clients with practical life experience and professionally trained MSWs. You also know that the combination of generalists and specialists can enhance service delivery to your clients. At the same time, there are issues creating structural and procedural problems as the agency grows.

- 1) What training initiatives could help this situation?
- 2) What organizational structural changes could be made to help?
- 3) What procedural changes should be considered?

APPENDIX 5B: CASE VIGNETTE: ABC AGENCY

You are members of the Board of Directors for ABC Agency, a 20-bed shelter with a director, four professional staff, and two support staff. The agency operates 365 days a year and 24 hours a day. Some of the revenue comes from Federal Emergency Management Agency (FEMA) dollars that are billed at a standard \$17/night per occupied bed. Some funding comes from the state, which reimburses at \$14/night per occupied bed. And the coalition provides funding at \$13/night per occupied bed. Therefore, it is important to keep all beds filled every night to maximize dollars from the various funding sources. The agency also does some fundraisers around the holidays and some summer fundraisers to help make ends meet.

Scenario 1

October, November, March, and April were mild months, and the agency only had 95% of the beds filled during those months. The agency is projecting a shortfall for the year. It is still early enough (early May) to be able to make operating corrections to balance the budget. As a board member, what would you recommend that the agency do?

Scenario 2

Fuel prices have skyrocketed, causing the cost of food to skyrocket, too. The Food Bank and Second Harvest (the two main sources of food) have had a shortage and have not been able to fill all your orders, meaning that you have had to go to commercial suppliers. As a board member, what do you recommend that the agency do?

Scenario 3

One of the professional staff members fell and broke a leg. The doctor is requiring that the person be off work for 2 months to recuperate. This leaves the agency

very short staffed. The director is requesting emergency funding to hire a replacement, but you are not sure where the funds will come from. On one hand, because this was a work-related injury, the staff member is still on the payroll receiving sick pay, but the work needs to be done. Because the employee receives only 75% salary while on sick time because insurance picks up the balance, there is a potential savings to the agency unless there is the need to hire a replacement. How does the board help the executive director address this problem?

Scenario 4

The executive director, who has been with the agency for 5 years, has been offered a position with a larger agency making about twice as much money. The director has given his 2-month notice. The board is discussing how and when to fill the position. If the position is vacant for a while, there is a potential to see some cost savings, and it has been a difficult year to balance the budget. On the other hand, there is the need to fill the position as soon as possible to maintain continuity and direction. In addition, it appears that it will cost about \$15,000 more a year to replace the director.

ABC Agency	
INCOME SOURCE	TOTAL (\$)
FEMA @ \$17/bed night	113,900.00
Coalition	87,100.00
State	93,800.00
Donations	179,000.00
Board contributions	20,000.00
Subtotal	493,800.00
PERSONNEL EXPENSES	TOTAL (\$)
Executive director	65,000.00
Director benefits	23,833.33
4 professional staff @ 35,000 each	140,000.00
Staff benefits	51,333.33

**APPENDIX 5C:
THINK TANK ACTIVITY**

Contributed by Carenlee Barkdull

Group 1: Brookings Institution

Group 2: Center for American Progress

Group 3: Cato Institute

Group 4: Heritage Foundation

Group 5: Urban Institute

Group 6: American Enterprise Institute

Group 7: Economic Policy Institute

Each group will deconstruct their assigned website. Pay particular attention to language, symbolism used, and embedded assumptions. Answer the following questions, but don't limit yourself to these; your group may come up with other information or insights to share.

- 1) How does the think tank announce itself on the home page (consider languages, images, aesthetics)? Use specific examples and identify what you think might be the underlying assumptions.
- 2) Were you able to locate a mission or purpose for the group (please share, if so)?
- 3) What were the major themes on the home page?
- 4) What were you able to find out about its history and funding, and how?
- 5) What information was not present that you looked for (note "selectivities and silences")?
- 6) Were you able to find the think tank on social media? What were your observations about how effectively these media were used?
- 7) Where would you place this think tank on the U.S. political landscape? What evidence do you have for your classification? Be specific.

- 8) Write and share with the class a brief appeal (a few sentences) to members of this think tank's constituency to garner support for a program or policy change that you care about. Think about language you would use or avoid.

Your group will verbally present responses to the above questions to the class (maximum of 13 minutes per group + 2 minutes for questions from the audience). Decide how you will split up this responsibility. You may use handouts if you like, or use technology to present something you want to share with the class (this is not a requirement of this activity; it is up to your group).

APPENDIX 5D:

“THE LIGHT OF DAY” STRIKES AGAIN: LEGISLATOR PROFILE

Contributed by Robert Vernon

(Name of legislator) _____

Directions

Read the biographical information your legislator has provided on his or her official website and describe what you have learned according to the following variables:

- **Sentiment:** What issues does the legislator seem to feel strongly about? What evidence did you find for this?
- **Salience:** What issues appear to be important to the legislator? What evidence did you find for this?
- **Power:** How powerful does this person appear to be as a legislator? What evidence did you find for this?

Probable position on proposed bill (put an “X” on the line):

Champion _____ Enemy

Arguments

Social arguments this person might be receptive to are _____

Economic arguments this person might be receptive to are _____

Cultural arguments this person might be receptive to are _____

Political arguments this person might be receptive to are _____

Personal arguments this person might be receptive to are _____

**APPENDIX 5E:
COMPARING POLICY ANALYSIS FRAMEWORKS**

Put together a packet with a range of policy analysis frameworks. Examples include Popple and Leighninger (2001), Prigmore and Atherton (1986), McPhail (2003), Segal (2010), and Schiele (2010).

Break the class up into small groups and assign each group a different framework. Assign each group the following tasks:

- 1) Review your assigned framework and be prepared to describe the framework and how it approaches policy analysis to the class in 1-2 minutes.
- 2) Identify what your group likes and dislikes about the framework's approach to analyzing policy. Would you recommend use of this framework?
- 3) Identify which elements of the framework your group finds most important for social workers to consider when analyzing policies.

Bring the class back together and ask each group to briefly describe their framework and analysis. Then, discuss as a class students' thoughts about the most important questions for social workers to consider when we analyze policies.

**APPENDIX 5F:
POLICY DEVELOPMENT EXERCISE**

- 1) Select a social issue of concern to you.
- 2) Identify a policy solution (or partial policy solution) to the social issue.
- 3) Using the operating elements from Chambers and Bonk (2013).
- 4) Identify the various elements of your social policy solution that you would include if you were to draft a piece of legislation.
 - a. What are the policy goals?
 - b. What are the forms of benefit for the social policy?
 - c. What are the eligibility criteria for the social policy?
 - d. What are the administrative considerations for the implementation of the social policy?
 - e. How should this policy be financed and sustained in the long run?
- 5) Identify some of the weaknesses in the proposed policy solution. For example, what populations would not be addressed by your partial policy solution?

**APPENDIX 5G:
ADVOCACY POLICY ROLE PLAY**

In this simulation, you will attempt to influence your decision maker to support a specific initiative (of your choosing). Your job in the role play is to introduce yourself, provide the decision maker with information about the issue, respond professionally to the decision maker's responses and questions, and seek to influence the decision maker to support the initiative under discussion. You will have 10 minutes.

Feedback Sheet

Social Work Policy Advocate's Name:

Observer's Name:

Date:

THE POLICY ADVOCATE . . .	YES	NO	COMMENTS
1. Introduced herself or himself to the decision maker upon meeting			
2. Explained her or his role and the purpose of the meeting			
3. Clearly stated the problem and desired change			
4. Offered evidence to support her or his claims			
5. Clearly stated the actions desired of the decision maker			
6. Articulated one or more actions to be taken after the meeting			
PERSUASION STRATEGIES	YES	NO	EFFECTIVELY?
7. Used rational persuasion			
8. Used value-based persuasion			
9. Used relational persuasion			
10. Used collaborative (mutual assistance) persuasion			
11. Used confrontational persuasion			

THE POLICY ADVOCATE . . .	EXCELLENT	VERY GOOD	GOOD	FAIR	POOR	COMMENTS (EXPLAIN YOUR RATING)
12. Consistently looked at the decision maker						
13. Maintained an open body posture						
14. Maintained an interested facial expression						
15. Demonstrated assertiveness						
16. Kept questions to a minimum						
17. Kept the conversation focused on the purpose of the meeting						
18. Responded effectively to decision maker's responses						

APPENDIX 5H: HISTORICAL POLICY ANALYSIS

Split students into groups. Each group is assigned a policy (or proposed policy) for completing this exercise. You can also assign the same policy to more than one group and discuss the variety of information each group garners from using different sources.

Directions

Using your laptops, tablets, or phones, work as a group to research and identify information to answer each of the following questions. Each member of your group will need to be familiar with the answer to each question.

- 1) Is this an official policy currently? If so, what is its official title, when was it adopted initially, and when was it adopted in its current form? If not, what is its status (e.g., is it a bill, a proposed regulation, which agency or committee is considering it)?
- 2) What problem does the policy or proposed policy seek to address?
- 3) Have there been earlier U.S. policies to address the same problem?
 - a. What policies? When were they adopted?
 - b. What did they these policies seek to do?
 - c. What is or was happening at the time (socially, politically, economically, and culturally) that affected the development of this policy or proposed policy?
- 4) What groups or types of people were or are major supporters or opponents when the policy or proposed policy was developed?
- 5) What sources of information did you use to find the answers to questions 1-4?
- 6) Which sources of information did you find most helpful and least helpful? Why?

APPENDIX 5I: DEVELOP VOLUNTEER MANUAL

Review applicable federal and state law in preparation for creating a volunteer manual for use within a nonprofit organization. Completion of this assignment should involve consultation with management, human resources, and the board of directors as applicable. Content should include the following sections:

- Welcome letter
- Table of contents
- Purpose and use of the manual
- Details of the organization
- Applicable policies
- Position description
- Signed volunteer agreement and acknowledgement of receipt
- Appendices
- Works cited

APPENDIX 5J: RURAL ADVOCACY PROJECT

Social workers are advocates for clients and causes in the community, in the legislature, and in administrative arenas. You will be asked to develop a rural community advocacy project in stages, culminating in a final class presentation. You may work in a pair or in a team (no more than six people on a team). If you want to pursue an individual project, you must have prior approval from the instructor before beginning your project. Each stage is described below and will be more fully explicated and regularly discussed in class. Each week, we will discuss your project and I will address any questions you have about each stage of this project. You will be expected to use your experiences as you develop this project to contribute to weekly class discussions. Each stage of your project must be completed on time and submitted to Blackboard as

directed. You will be given the opportunity to revise each stage as you move forward, incorporating instructor feedback and resubmitting for a grade revision before or with submission of the subsequent stage. The final project, including all stages and the executive summary, should be collated and submitted in a binder or folder. You will present the project in class, and your presentation must include a visual media piece. The grading rubric for each stage of the project is available on Blackboard.

Stage 1: Selection of a problem, opportunity, or issue: Identify, fully research (get the facts, statistics, scope of the problem), and present the problem, opportunity, or issue (see for example pp. 118–119, 121–123, and 212–217 in Schneider & Lester, 2001, or Chapter 4 in Hoefler, 2015). Remember to keep the rural and community focus.

Stage 2: Brief stakeholder needs assessment: This is typically the most labor-intensive and time-consuming stage and requires careful time management. Conduct a brief needs assessment with stakeholders, using a needs assessment framework of your choice (reference readings from your research and your Communities courses, and see examples on Blackboard). Who are the stakeholders? How did you identify them? How do they see the issue? What actions do they see are necessary? What differences are found between stakeholders? Are any stakeholders in competition? Is there diversity among stakeholders, or are they homogeneous? Data from interviews, focus groups, or surveys with stakeholders must be included and can be appended to stage 2. Remember that advocacy is a collaborative process. Is this your cause or your constituents’?

Stage 3: Goals, strategies, and tactics: First, set goals, using information gained from stages 1 and 2 (see pp. 238–239 in Schneider & Lester, 2001; Chapter 5 in Hoefler, 2015). Next, discuss how you will measure whether you meet these goals and provide a logic model or advocacy map as part of stage 3. (Examples of logic models are provided on Blackboard, and advocacy maps are discussed in Chapter 5 of Hoefler, 2015). Next, plan strategies and tactics (pp. 124–143, 186–189, and 218–226 of Schneider & Lester, 2001; Chapters 6 and 7 in Hoefler, 2015). What communication tools will you use? Forums? Written communiqués? Media? What ethical considerations need to be addressed? Finally, identify your role. Who will lead this effort? Will the use of a coalition be helpful? If so, who is included in this

coalition? Who or what can be defined as your opposition? How will you deal with your opposition? If you meet your goals, who wins and who loses?

Stage 4: Implementation and evaluation: Carry out one or more pieces of your strategic plan and critically evaluate your efforts (pp. 143–150 and 238–239 in Schneider & Lester, 2001; Chapters 8 and 9 in Hoefer, 2015). What worked? What didn't? What would or will you do differently in the future?

Final Presentations: The final two classes will be spent presenting a summary of the advocacy projects (note two dates here). Often after the completion of a large project you will be asked by your employer or board of directors to write an executive summary. The final presentation should consist of this executive summary (examples are available on Blackboard) and a brief visual media piece that you develop (e.g., video, PowerPoint, Prezi). Convince your classmates that they should act on your advocacy issue. Your classmates will be given the opportunity to provide feedback. As an advocate you are often given a time limit to present your project to various groups (e.g., community leaders, legislators); therefore, we will hold to a strict 10-minute time limit, with a few minutes in between for questions.

APPENDIX 5K: WHO REPRESENTS ME IN GOVERNMENT?

Objective

To learn to effectively navigate political and legislative processes, it is important for students to understand key structures through which policy is made and to learn about key players in the political process. This assignment gives students an opportunity to identify some of the political figures representing their communities, in preparation for the work we will be doing throughout the course.

Format

Fill in the blanks to respond to each of the questions on the following pages, providing the most accurate response to each question for *your specific address*. You are welcome to use any electronic resource that you find helpful in completing this assignment. One website you may find helpful is <http://>

www.fyi.legis.state.tx.us/Home.aspx. If your residence is not in Texas, you will find that most states have a similar web resource.

City or County Government

- 1) What is the name of the city or county in which you live?
- 2) What is the name of the group of elected officials in charge of the city or county in which you live?
- 3) Who represents your address in this group of elected officials?

State Government

- 4) Who is the governor of the state in which you live, and to which political party does he or she belong?
- 5) Who is the lieutenant governor of the state in which you live, and to which political party does he or she belong?
- 6) Who represents your address in your state senate (your state senator), and to which political party does he or she belong?
- 7) Who represents your address in your state house of representatives (your state representative), and to which political party does he or she belong?

U.S. Government

- 8) Who is the president of the United States, and to which political party does he or she belong?
- 9) Who are the two primary candidates running for U.S. president and vice president in 2016, and to which political party does each candidate belong?
- 10) Who represents your address in the U.S. Senate (your U.S. senator), and to which political party does he or she belong?

- 11) Who represents your address in the U.S. House of Representatives (your U.S. representative), and to which political party does he or she belong?
- 12) Name one social worker who holds national political office (i.e., a U.S. senator or U.S. representative).

APPENDIX 5L: HEARING ANALYSIS

Each student will attend a legislative hearing at any level of government. Any topic is acceptable, although one related to health or human services is preferred. Your instructor may also advise you of upcoming hearings that may be of interest.

After attending the hearing, reflect critically about what you witnessed. For purposes of this assignment, observing the environment and understanding the process are more important than the actual subject matter.

After the event, you will submit a 3- to 5-page paper that addresses the following:

- 1) Subject, date, time, and location of the hearing. Level of government (local, state, national). Name of committee or subcommittee with jurisdiction. Type of hearing: specific bill, issue, oversight, confirmation?
- 2) Physical environment: Describe the room in which the hearing is being held. What does it suggest to you about the nature of the event? How is the room set up? Who is in attendance? Who sits where? What can you surmise from this?
- 3) The agenda: Who are the witnesses? In what order do they appear? Why?
- 4) The testimony: Identify a witness who you think is especially effective. What, specifically, do they do to maximize the impact of their testimony? Why, specifically, is it more effective than the testimony of other witnesses?

- 5) The response: How many committee members are present? Which ones? From which party? How do they behave toward each other? Toward the witnesses? What seems to be the role of their staff? What would you guess are the legislators' reasons for being present? What are they trying to accomplish?
- 6) The media: Are members of the press in attendance? Is the hearing being televised? If so, what difference (if any) does this seem to make?
- 7) Impressions and analysis: What was your impression of the hearing? What did you learn? How did what you observed compare with your expectations and with the description of hearings in your text? How could you use this experience?

APPENDIX 5M: SUPREME COURT CONTRIBUTIONS TO SOCIAL POLICY: CASE ANALYSIS

Each student will identify, research, and analyze a case decided by the U.S. Supreme Court on a topic of relevance to social work. Students may choose from those listed below or may propose a case for the instructor's approval. The analysis may be presented in either written or oral form.

In a 10- to 12-page paper (double-spaced) or a 20-minute oral presentation, each student will:

- describe the relevant facts of the case;
- share any background information that provides historical or legal context for the Court's decision;
- explain the Court's holding and rationale;
- comment on the positions taken by specific justices, when noteworthy;
- analyze the case's contribution to social policy;
- comment on the case's relevance to social work and the holding's consistency with social work values.

Recommended Cases

Roe v. Wade (1973): abortion

Griswold v. Connecticut (1965): contraception

Adoptive Couple v. Baby Girl (2013): adoption

DeShaney v. Winnebago County DSS (1989): child welfare

Roper v. Simmons (2005): juvenile death penalty

In Re Gault (1967): juvenile justice

Plyer v. Doe (1982): immigration

Goldberg v. Kelly (1970): welfare

Gideon v. Wainwright (1963): poverty

Loving v. Virginia (1967): interracial marriage

Korematsu v. United States (1944): internment of Japanese Americans

Obergefell v. Hodges (2015): marriage equality

Boy Scouts of America v. Dale (2000): LGBT rights

Safford Unified School District v. Redding (2009): rights of students

Morse v. Frederick (2007): rights of students

Evenwel v. Abbott (2016): gerrymandering

Shelby County v. Holder (2013): voting rights

Tapia v. United States (2011): criminal sentencing

Johnson v. California (2005): race and imprisonment

Miranda v. Arizona (1966): criminal law

Olmstead v. L.C. & E.W. (1999): disabilities

Cruzan v. Missouri Dept. of Health (1990): right to die

Swidler v. Berlin (1998): confidentiality

Jaffee v. Redmond (1996): privileged communication

District of Columbia v. Heller (2008): gun ownership

APPENDIX 5N: LEGISLATIVE PROPOSAL ASSESSMENT

Contributed by Giselle Ferretto

This assignment, based on an example from Maryland, can be adopted for any state legislature.

<p>Legislative Proposal Assessment</p> <p>To complete this worksheet, obtain a copy of your state's bill that is proposing to make a change in a social work-related area that interests you. Be sure that the bill is a few pages long so you have enough content to assess. For example, see the Maryland General Assembly homepage (http://mlis.state.md.us) to locate a bill and the status information regarding the bill. The legislature is in session from January to April. If you are completing this worksheet when the legislature is <i>not</i> in session, obtain a copy of a bill that either passed or failed in the previous legislative session.</p>		
Bill number	<input type="checkbox"/> HB _____ (House Bill) or <input type="checkbox"/> SB _____ (Senate Bill)	
Title of the bill		
Identify the committee assigned to this bill		
Identify the legislative session in which the bill was introduced	Was the bill introduced (and failed) in other previous legislative sessions? If yes, in what other years has it been introduced?	
Identify the sponsors of the bill and what districts they represent (attach additional page if necessary).	Name of sponsors of the bill	Legislative district
Identify any significant themes related to the sponsors of the bill. (Are they from the same county? All female? All attorneys?)	Legislative district and geographic area they represent	
Identify the chairperson of the committee that this bill is assigned to.		

<p>Where does the proposed change reach?</p>	<p><input type="checkbox"/> Entire state</p> <p><input type="checkbox"/> Baltimore City, or</p> <p><input type="checkbox"/> specific county _____</p>
<p>What section of the law (<i>Annotated Code of Maryland</i>) is the bill attempting to amend, either by adding or deleting content?</p> <p>Note: the same bill may amend more than one law, so look carefully throughout the bill to see if multiple laws are being amended (e.g., Family Law § 5-701; Health General §4-306; Health Occupations Article §19-302). Look at the lines after the words, “By repealing and reenacting, with amendments.”</p>	
<p>What is the bill attempting to change? Note: The new language BEING ADDED TO THE BILL WILL BE IN CAPITAL LETTERS, and the language that is [being deleted from existing law will be contained in brackets] “[].”</p>	
<p>Who is affected by the changes? (programs, populations, professionals)?</p>	
<p>How does this change affect social work practice or the delivery of services?</p>	
<p>What social work values or ethics is this issue related to (e.g., confidentiality, self-determination, collaboration)? And how?</p>	

<p>Are there social work theories, evidence-based practice, or concepts that may shed light on this issue?</p>		
<p>Who might be in favor of this bill (individuals and organizations)? Why?</p>	<p>Who might be opposed to the bill (individuals and organizations)? Why?</p>	
<p>Are there expenses associated with the changes this bill proposes (e.g., items, personnel, treatment, training needed to implement the change)?</p> <p>How would you go about calculating the cost?</p>		
<p>What are your feelings about the bill?</p>	<p>Would you change any parts of it? Why?</p>	
<p><input type="checkbox"/> Date and time the hearing was held:</p>	<p><input type="checkbox"/> Date and time of upcoming hearing for the bill:</p>	<p><input type="checkbox"/> No hearing date is set yet.</p>
<p>Is there a companion bill?</p> <p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If yes, the companion bill's number:</p>	
	<p>Companion bill's title:</p>	
	<p>What committee is assigned the companion bill?</p>	
	<p>Are there any differences in the language between the companion bills? If so, summarize the differences.</p>	



Competency 6:

Engagement With Individuals, Families, Groups, Organizations, and Communities

SPECIALIZED MACRO PRACTICE COMPETENCY DESCRIPTION

Effective macro practice with individuals, families, groups, organizations, and communities begins with engaging key stakeholders to better understand social problems, identify resources and assets, and develop strategies to address stakeholder concerns. It is an ongoing, iterative, and dynamic process that starts with initial engagement and continues through assessment, intervention, and evaluation. Macro social workers must recognize interconnections and interdependencies between micro, mezzo, and macro systems. Macro social workers must be adept at moving across these systems to engage community members, organizations, policymakers, and other community leaders. They create, nurture, and deepen authentic and strategic relationships and consider power dynamics in selecting, implementing, and modifying engagement strategies. They manage conflict and disagreement with respect, seek common ground, and interact effectively with both allies and opponents while maintaining a commitment to social justice and the needs of vulnerable populations. Macro social workers build collaborative relationships that bring together stakeholders at the grassroots and interorganizational levels for a common purpose to improve social, economic, and environmental well-being. Using an ecological system perspective, macro social workers understand and apply a range of theories (e.g., critical race theory, feminist theory) that examine the structural and institutional forces and power dynamics that shape the context of the social problem. Macro practitioners understand that their personal experiences and affective reactions may affect how they engage with diverse stakeholders and audiences and how clients,

constituencies, and stakeholders may engage with them based on their identities and background.

COMPETENCY BEHAVIORS

Social workers in macro practice

- acknowledge and address how aspects of their own identities (e.g., background, status, privilege) affect the engagement process;
- actively engage with individuals, families, groups, communities, and organizations affected by the issue or problem in ways that value, respect, and include their expertise, knowledge, and culture;
- develop and implement multiple engagement strategies that reflect an understanding of structural, environmental, and power dynamics; policymakers' characteristics and objectives; and the strengths, priorities, and interests of stakeholder groups;
- demonstrate effective group facilitation and mediation skills to promote dialogue and collaborative processes;
- use interpersonal skills and relationship building to gain credibility with allies, clients, and constituents at the grassroots level in defining and communicating community and organizational needs and advancing potential solutions with decision makers;
- develop their own leadership skills and those of constituent groups to initiate and facilitate dialogue that mobilizes and sustains action;
- use the roles of facilitator, organizer, educator, coach, trainer, and bridge builder to engage with members of a community groups and organizations to collaborate on a problem or condition they have mutually identified and want to solve or change;
- identify relevant constituencies, partners, and targets with whom relationships are necessary for policy change;
- use multiple digital, written, and verbal communication skills to engage different constituencies, partners, and target audiences.

CURRICULAR RESOURCES MAPPED TO COMPETENCY DIMENSIONS

<i>Readings</i>	
Resource	Competency Dimension
ARTICLES	
Annie E. Casey Foundation. (2003). <i>Resident engagement and leadership to improve results for children and youth, families, and communities</i> . Retrieved from http://www.aecf.org/m/resourcedoc/aecf-ResidentEngagementInternationalToolkit-2003.pdf	Knowledge
Annie E. Casey Foundation. (2014). <i>Race equity and inclusion action guide: Seven steps to advance and embed race equity and inclusion in your organization</i> . Baltimore, MD: Author. Retrieved from http://www.aecf.org/m/resourcedoc/AECF_EmbracingEquity7Steps-2014.pdf	Knowledge
Bailey, D., & Emmerson, M. (Guest Eds.). (2018). Interconnections of micro and macro practice: Sharing experiences of the real world [Special Issue]. <i>Reflections: Narratives of Professional Helping</i> , 24(1), 1-167. Retrieved from https://www.reflectionsnarrativesofprofessionalhelping.org/index.php/Reflections/issue/view/123	Knowledge
Foster-Fishman, P. G., Berkowitz, B. L., Lounsbury, D. W., Jacobson, S. T., & Allen, N. A. (2001). Building collaborative capacity in community coalitions: A review and integrative framework. <i>American Journal of Community Psychology</i> , 29, 241--261.	Knowledge
Nelson, G., Amio, J. L., Praelitensky, I., & Nickels, P. (2000). Partnerships for implementing school and community prevention programs. <i>Journal of Educational and Psychological Consultation</i> , 11, 121--145.	Knowledge
Hamill, L. (2016). <i>Well-being and engagement report</i> . Limeade Institute and Quantum Workplace. Retrieved from https://www.quantumworkplace.com/future-of-work/2016-well-being-and-engagement-report	Knowledge
Harter, J., & Adkins, A. (2015, April 2). What great managers do to engage employees. <i>Harvard Business Review</i> . Retrieved from https://hbr.org/2015/04/what-great-managers-do-to-engage-employees	Knowledge
Hon, L. (2016). Social media framing within the Million Hoodies Movement for Justice. <i>Public Relations Review</i> , 42, 9-19.	Knowledge Values Skills

(continued)

Readings (continued)

Resource	Competency Dimension
Lens, V. (2005). Advocacy and argumentation in the public arena: A guide for social workers. <i>Social Work, 50</i> (3), 231-238.	Knowledge Skills
Mizrahi, T. (2001). Complexities of coalition building: Leaders' successes, strategies, struggles and solutions. <i>Social Work, 46</i> (1), 63-78.	Knowledge Skills
Shuck, B., Collins, J., Rocco, T., & Diaz, R. (2016). Deconstructing the privilege and power of employee engagement: Issues of inequality for management and human resource development. <i>Human Resource Development Review, 15</i> (2), 208-229.	Knowledge
Takacs, D. (2003). How does your positionality bias your epistemology? <i>Thought and Action, 27</i> , 27-38. Retrieved from http://www.nea.org/assets/img/PubThoughtAndAction/TAA_03_04.pdf	Knowledge Values
Teater, B. (2008). Influencing state legislators: A framework for developing effective social work interest groups. <i>Journal of Policy Practice, 8</i> , 69-86.	Knowledge Skills
Toft, J. (2010). The political act of public talk: How legislators justified welfare reform. <i>Social Service Review, 84</i> (4), 563-596.	Knowledge Values Skills
Vecina, M., Chacó, F., Marzana, D., & Marta, E. (2013). Volunteer engagement and organizational commitment in nonprofit organizations: What makes volunteers remain within organizations and feel happy? <i>Journal of Community Psychology, 41</i> , 291-302.	Knowledge
Walker, L., & East, J. (2014). The benefits of including engaged residents and professionals in low-income neighborhood redevelopment planning processes. <i>Journal of Community Practice, 22</i> (3), 342-364.	Knowledge Values Skills
Waters, R. D., & Lord, M. (2009). Examining how advocacy groups build relationships on the Internet. <i>International Journal of Nonprofit and Voluntary Sector Marketing</i> . doi:10.1002/nvsm	Knowledge Skills
Woodford, M., & Preston, S. (2011). Developing a strategy to meaningfully engage stakeholders in program/policy planning: A guide for human service managers and practitioners. <i>Journal of Community Practice, 19</i> (2), 159-174.	Knowledge

(continued)

Readings (continued)

Resource	Competency Dimension
BOOK CHAPTERS	
Bolman, L. G., & Deal, T. E. (2017). <i>Reframing organizations: Artistry, choice, and leadership</i> (6th ed., Chapter 16). Hoboken, NJ: Wiley.	Knowledge
Kumar, S. (2002). Space-related PRA methods. In <i>Methods for community participation: A complete guide for practitioners</i> (Chapter 2, pp. 54–71). Warwickshire, UK: MDG Publishing.	Knowledge Values Skills
Lyons, A. (2011). Leading the traditional giving pyramid: Overview of types and levels of giving. In K. A. Agard, <i>Leadership in nonprofit organizations: A reference handbook</i> (Chapter 51, pp. 456–464). Thousand Oaks, CA: SAGE.	
Mizrahi, T., Rosenthal, B. B., & Ivery, J. (2011). Coalitions, collaborations, and partnerships: Interorganizational models of social change. In M. Weil, M. Reisch, & M. L. Ohmer (Eds.), <i>Handbook of community practice</i> (2nd ed., pp. 383–402). Thousand Oaks, CA: Sage.	Knowledge Skills Cognitive and Affective Processes
Shulman, L. (2010). Preparatory and beginning phases. In <i>Interactional supervision</i> (Chapter 3, pp. 45–94). Washington, DC: NASW Press.	Knowledge Values Skills
Weinbach, R. W., & Taylor, L. M. (2015). Promoting a productive work environment . In <i>The social worker as manager: A practical guide to success</i> (7th ed.). Boston, MA: Pearson/Allyn & Bacon.	Knowledge Values Cognitive and Affective Processes
BOOKS	
Friedman, M. (2015). <i>Trying hard is not good enough: How to produce measurable improvements for customers and communities</i> (10th anniversary ed.). Santa Fe, NM: Parse Publishing.	Knowledge Values Skills
Kohanov, L. (2016). <i>The five roles of a master herder: A revolutionary model for socially intelligent leadership</i> . Novato, CA: New World Library.	Knowledge Values Skills

<i>Media</i>	
Resource	Competency Dimension
<p><i>Task Force Groups/Group Dynamics</i> video https://www.youtube.com/watch?v=hEJaz3sinEsv</p>	<p>Knowledge Values Skills Cognitive and Affective Processes</p>
<p>The National Center for Cultural Competence https://nccc.georgetown.edu/index.php Many potential resources that address engaging clients and constituents to ensure culturally competent services, including discussion of cultural brokers.</p> <p>Presentation of the Framework https://nccc.georgetown.edu/foundations/framework.php</p>	<p>Knowledge Values Skills Cognitive and Affective Processes</p>
<p>Debate Graph https://debategraph.org/Stream.aspx?nid=61932&vt=ngraph&dc=focus</p>	<p>Knowledge Skills</p>
<p><i>Driving Employee Engagement</i> with Daniel Pink (video, 23:41) https://www.youtube.com/watch?v=x8PsRWvJz00</p>	<p>Knowledge Values Cognitive and Affective Processes</p>
<p><i>Holding Ground: The Rebirth of Dudley Street</i> (New Day Films, 1996). Video provides lessons in effective engagement with community residents and stakeholders https://www.newday.com/film/holding-ground-rebirth-dudley-street</p>	<p>Knowledge Values Cognitive and Affective Processes</p>
<p><i>inSocialWork</i> podcast series Episode 156: Beth Kanter, <i>Social Media in Nonprofits: Letting Outsiders In and Letting Insiders Out</i> http://www.insocialwork.org/episode.asp?ep=156</p>	<p>Knowledge Values Cognitive and Affective Processes</p>

(continued)

Media (continued)

Resource	Competency Dimension
<p><i>Social Workers and the Media</i> podcast (Feb. 18, 2013): Interview with Maiken Scott</p> <p>http://socialworkpodcast.blogspot.com/2013/02/social-workers-and-media-interview-with.html</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>
<p>TED Talk: Jonathan Haidt, <i>The Moral Roots of Liberals and Conservatives</i></p> <p>https://www.ted.com/talks/jonathan_haidt_on_the_moral_mind#t-233400</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>
<p>TED Talk: Meghan Phelps-Roper, <i>Leaving Westboro Baptist Church</i></p> <p>https://www.ted.com/talks/megan_phelps_roper_i_grew_up_in_the_westboro_baptist_church_here_s_why_i_left</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>
<p>University of Kansas Work Group for Community Health and Development, Community Tool Box (n.d.), <i>Using Social Media for Digital Advocacy</i></p> <p>http://ctb.ku.edu/en/table-of-contents/advocacy/direct-action/electronic-advocacy/main</p>	<p>Skills</p>

In-Class Exercises

Resource	Competency Dimension
<p>Advocacy Communications Critique</p> <p>In this group activity, students deconstruct and critique examples of written advocacy communications.</p> <p>See Appendix 6B.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Engaging Staff</p> <p>Using Bolman and Deal (2017), Chapter 16, “Reframing in Action: Opportunities and Perils,” reflect on a staff situation you have in your field agency. How might you address this situation using each of the four frames? How would you alter your engagement strategy depending on your choice of frames? The four frames are Structural, Human Resources, Political, and Symbolic.</p>	<p>Knowledge</p> <p>Skills</p>

(continued)

In-Class Exercises (continued)

Resource	Competency Dimension
<p>Identifying and Engaging Stakeholders</p> <p>This exercise requires students to critically think about how to engage various stakeholders based on their level and type of engagement. See Appendix 6C.</p>	<p>Knowledge Values Skills Cognitive and Affective Processes</p>
<p>Supervision: Engaging With Your Supervisees</p> <ul style="list-style-type: none"> ● Based on the discussion of positionality by Takacs (2003), reflect on how your social identity might have influenced your engagement with your supervisees. ● How might your social identity influence your administrative practice and engagement? ● How might your positionality influence how others perceive you? ● Read one of your peers' critical reflection posts and respond. What insights did you gain? How does reading your peer's post influence your own approach? 	<p>Knowledge Values Skills Cognitive and Affective Processes</p>
<p>Rebuttal of How to Conduct Yourself as a Practitioner Abroad</p> <p>Students read two articles on engaging in an international context while traveling to inform how one would engage with local populations. See Appendix 6A.</p>	<p>Knowledge Values Cognitive and Affective Processes</p>
<p>Results-based Accountability: Engaging Stakeholders</p> <p>Develop a plan or work with an agency to engage stakeholders in results-based accountability process. Use the tools in Friedman (2015).</p>	<p>Knowledge Values Cognitive and Affective Processes</p>

(continued)

In-Class Exercises (continued)

Resource	Competency Dimension
<p>Transect Walk</p> <p>A transect walk is a systematic walk along a defined path (transect) across the community or project area together with the local people to explore the conditions by observing, asking, listening, looking, and producing a transect diagram. The transect walk is normally conducted during the initial phase of the field work. It is best to walk a route that will cover the greatest diversity in terms of the focus of the transect walk (e.g., sanitation and water sources). The transect walk is conducted by the practitioner and community members. The information collected during the walk is used to draw a diagram or map, based on which discussions are held among the participants.</p> <p>https://www.sswm.info/humanitarian-crises/urban-settings/planning-process-tools/exploring-tools/transect-walk</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p>

Assignments

Resource	Competency Dimension
<p>Analyze Top Hashtags for Your Social Issue</p> <p>Much issue organizing occurs online, particularly on social media sites. Using the R code you learned in class and the Twitter API, look for the top hashtags concerning the social issue of your choice and answer the following questions:</p> <ol style="list-style-type: none"> 1. Who is using this hashtag? (e.g., organizations, individuals, activists)? 2. Is this a popular hashtag? How do you know? 3. In what ways is this hashtag used (e.g., event organizing, storytelling, advocacy)? 4. Does the hashtag have a physical world component (e.g., are there rallies linked to the hashtag)? 5. Using http://hashtagify.me/, make a note of other hashtags related to your social issue hashtag. Is there anything interesting about the related hashtags from an organizing perspective? Compile your results into a 5-minute presentation that you will deliver in class. <p>For more about R code, visit https://www.r-project.org/</p> <p>For more about Twitter API, visit https://developer.twitter.com/en/docs.html</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

(continued)

Assignments (continued)

Resource	Competency Dimension
<p>Case Study: Stakeholder Engagement in Program Development</p> <p>Have students read a case study and identify how clients and constituents are included in the process of defining the social problem and needs. Alternatively, they must come up with a plan to engage a variety of stakeholders in the process, including who they will be and how they will involve them to ensure an inclusive and just process.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Create an Infographic for Your Social Issue</p> <p>It is important for organizers to be able to identify key data points to support their efforts and to communicate them to the public in a clear, engaging, and understandable manner.</p> <p>Infographics are visual representations of information. They should be easy to understand and visually engaging. Students are expected to review available data related to their social issue, then create an infographic that conveys what they consider to be the most important data related to their social issue group. Accompanying the infographic is a single-page explanation of the rationale for the information chosen and a proposal for how the infographic could be strategically used in current organizing efforts to address their social issue. Infographics can be created using a free program (Piktochart) or another free online program of the student's choice.</p> <p>Tips for creating infographics will be reviewed in class. Additional support can be found at</p> <p>http://www.creativebloq.com/infographic/tools-2131971</p> <p>http://www.creativebloq.com/graphic-design-tips/information-graphics-1232836</p> <p>Each group member should create their own infographic. Students will present the infographics in class in a 3-minute presentation.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Profiles of Elected Officials</p> <p>Students research their state and federal legislators and consider how they can best connect with them to advance social work's policy agenda.</p> <p>See Appendix 6D.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Social Media Assignments</p> <p>This assignment gives students an opportunity to engage in policy discussions and activism on social media.</p> <p>See Appendix 6F.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

(continued)

Assignments (continued)

Resource	Competency Dimension
<p>Survey of Advocacy Organizations</p> <p>This assignment familiarizes students with advocacy organizations and coalitions in their area of interest and requires them to become involved with their efforts.</p> <p>See Appendix 6E.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

Field Activities

Resource	Competency Dimension
<p>Interorganizational Engagement in Collaborations, Coalitions, and Partnerships</p> <p>This assignment has two parts: an 8- to 10-page written summary done as a group and a 15-minute in-class group presentation. The purpose of this two-part assignment is to give students the opportunity to engage in interorganizational relationship building, which includes observing, analyzing, intervening in, and evaluating a community collaboration, partnership, or coalition locally or nationally. Students will also obtain the skill of engaging in a collaborative process by working in pairs or a small group to produce a collective product.</p> <p>See Appendix 6G.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

APPENDIX 6A: REBUTTAL OF HOW TO CONDUCT YOURSELF AS A PRACTITIONER ABROAD

Kristof, N. (2010, October 20). "D.I.Y. foreign-aid revolution." *New York Times Magazine*. Retrieved from http://www.nytimes.com/2010/11/07/magazine/07letters-t-THEDIYFOREIG_LETTERS.html

Algozo, D. (2010, October 26). "Don't try this abroad." *Foreign Policy*. <http://foreignpolicy.com/2010/10/26/dont-try-this-abroad/>

- 1) Why is it important to work with local experts?
- 2) What do you think about the do-it-yourself foreign aid model?
- 3) What is your reaction to the Western heroine coming to save the world?
- 4) Are good intentions enough? Why or why not?

- 5) How can we ensure that the work actually serves the best interests of the beneficiaries when the funding comes from the other side of the globe?
- 6) What strategies would you use to engage communities for social change?

APPENDIX 6B: ADVOCACY COMMUNICATIONS CRITIQUE

This exercise can be used with any sort of advocacy communication. It is most commonly used with a sample advocacy letter or with testimony. Students read or watch the communication and then discuss these questions in a group.

- 1) What is the advocate's advocacy goal?

Target (audience)

- 2) Who is the advocate's target?
- 3) Did the advocate specifically tailor the argument to the target? How?
- 4) Did the advocate make any assumptions about the target? What were they?

Framing the Argument

- 5) Did the advocate try to establish common ground with the target? If so, how?
- 6) What values did the advocate use in the argument? How did the advocate respond to the target's values in the argument?
- 7) Did the advocate provide emotional evidence to support the argument? Empirically based evidence? Why do you think the advocate chose the forms of evidence used?
- 8) Is the advocate's message clear?

Language and Imagery

- 9) In what ways did the advocate intentionally use specific language or imagery to support the argument?

Professional Use of Self

- 10) How did the advocate establish credibility? Was the advocate successful?
- 11) Does the advocate come across genuinely?
- 12) Any other observations about the advocate's use of self in communicating the argument?

Overall Reflection

- 13) Do you think this was an effective use of argumentation or persuasion?
- 14) What did you like about this example of advocacy communication? What didn't you like?

APPENDIX 6C: IDENTIFYING AND ENGAGING STAKEHOLDERS

Contributed by Jill Manit

Step 1: Stakeholder Identification

- 1) Identify a social issue that is important to you.
- 2) Develop a list of all stakeholders who should be at the table in developing policy solutions on this issue. Consider the characteristics you need on board, such as expertise, connections, resources (e.g., access to information, space, staff, constituents, money), and reputation.
- 3) Review your list. Did you include those who have power to make change? Client groups? You? Have you considered public agencies, elected officials, relevant nonprofits, the business sector, the legal community, schools and universities, and public health entities?
- 4) Write each stakeholder on a different note card. Include each stakeholder's name and specific agency or group.

Step 2: Stakeholder Analysis

Take about 2 minutes to sort your note cards along the following chart:

Step 3: Stakeholder Engagement

- 1) Considering your stakeholder analysis, build a plan to engage your stakeholders according to their level of involvement.
- 2) How will you engage and retain stakeholders in each of the four groups?

APPENDIX 6D: PROFILES OF ELECTED OFFICIALS

As social work advocates, we are committed to advancing a policy agenda that meets the needs of those most vulnerable, including minorities and populations at risk. Achieving such an agenda depends in part on electing to public office leaders who share social work values and will champion social work causes. We have an ethical duty to educate ourselves about candidates for office and the elected officials who represent us. The more we know about those who represent us, the more effectively we can work with them toward improved policy outcomes.

For this assignment, you will identify those who represent you in the U.S. Congress and in your state legislature. For each, provide the following information:

- date first elected to the legislature
- political party affiliation
- committee and subcommittee memberships
- leadership positions (if any)
- voting record or reputation (provide source)
- issues of particular interest or areas of expertise
- fit with social work priorities
- key staff names and contacts
- other relevant information

Based on the information you collect, provide a 1- to 2-page analysis of how this information could be useful to you as you increase your policy advocacy activity on behalf of the social work profession and those we serve. Be as

specific as you can, drawing on what you now know about each of the people you've profiled. On which issues (if any) might each legislator be helpful? How might you make a connection with him or her? Your paper will be evaluated on the basis of thoroughness, accuracy, and demonstrated critical thinking. Please include a list of your sources, in APA reference style. Total length: 3–5 pages.

APPENDIX 6E:

SURVEY OF ADVOCACY ORGANIZATIONS

This assignment is designed to connect you, as a social work student and prospective professional, to the local, state, and national advocacy organizations and coalitions that promote policy change on an issue of importance to you.

Each student will identify an area of interest (e.g., child welfare, education, homelessness, disabilities, older adults, mental health, healthcare, substance abuse, immigration, racial equality, LGBT rights, women's rights, domestic violence, juvenile and criminal justice, employment, poverty, hunger).

In a 5- to 7-page paper, you will do the following:

- Identify four advocacy organizations or coalitions that promote policy change within your interest area
- Research the background, scope, and membership of each one
- Describe the kinds of activities each engages in (including how they use social media to engage others) and any recent victories they claim
- Interview a participant, staff member, or leader about how they are organized, staffed, and funded
- Identify the other organizations and legislators (or legislative committees) with which they work closely
- Describe each organization's advocacy agenda for the current year, making note of any specific initiatives that you find especially intriguing or exciting
- Detail the specific ways in which you, as an aspiring policy practitioner, could become involved with each organization and explain how you could leverage what they offer to make yourself a more effective advocate

APPENDIX 6F: TWITTER ASSIGNMENT

Contributed by Casey Bohrman

Social media, but particularly Twitter, has become an important venue for policy discussions and social activism. Because anyone can create a Twitter account, it democratizes the media and can allow students to take an active role in public discussions and provide an opportunity to learn from people directly affected by the policies we study. This assignment has three parts: creating and updating the Twitter account, engaging in a Twitter chat, and writing a paper about your experiences on Twitter.

Updating a Twitter Account

Students are required to create a Twitter account. You may focus on a specific social policy area (e.g., domestic violence or criminal justice policy) or more generally on social justice. Students are expected to regularly update their Twitter accounts (at least once per week). You should follow at least 15 relevant accounts, in addition to all students in your class. You will all add your Twitter handles (names) to a Google Doc so you can follow one another. You should be interacting with other users and coming up with original tweets, as well as retweeting relevant information. To enable classmates to find their tweets, students should end all tweets with a hashtag that includes the class number.

Twitter Chats

Twitter chats use hashtags to allow for a live conversation, typically over the course of an hour, with other Twitter users. To practice engaging in a Twitter chat, we will do one in class. Your grade will be part of your class participation grade. You can attend class for technical support or participate from home if you feel comfortable using Twitter. Before class, watch “Pay It No Mind: The Life and Times of Marsha P. Washington”:

<https://www.youtube.com/watch?v=rjN9W2KstqE>

You will join in 1 hour of a live Twitter chat addressing the following:

- How you see themes from the film resonating in modern policy issues and current debates
- How intersectionality of oppression played a role in Marsha's life
- How themes from the movie relate to themes in the readings

You must send at least three tweets and respond to at least one other person's tweets with the hashtag #payitnomind.

You will then be graded on your participation in a nationwide #macrosocialwork chat on Twitter. #Macrosocialwork chats are every Thursday night from 9 to 10 p.m. and address a range of topics related to policy and social work. You will be assigned a specific date to participate. Students are expected to send out at least four tweets (including replies to others). You will be graded on your level of participation and the thoughtfulness of your comments.

Twitter Final Paper

At the end of the semester, students should write a three-page paper addressing the following:

- What was your experience like on Twitter this semester? How did it help you stay connected to policy discussions in your area of interest? What were some of the challenges you experienced in using Twitter on a regular basis?
- Based on your experience this semester and on class and outside readings, what do you see as the strengths and limitations of using Twitter to engage in social activism? (You should incorporate at least two class or outside readings.)

You will be graded on clarity of thought and ability to integrate discussion of your experience with course readings.

APPENDIX 6G: INTERORGANIZATIONAL ENGAGEMENT IN COLLABORATIONS, COALITIONS, AND PARTNERSHIPS

Select an interorganizational entity (a coalition, collaboration, or partnership) that has been established to improve conditions, coordinate activities, or build community participation to alleviate a social problem. Students are encouraged to focus on an entity in which their agency is involved or one to which they have access.

Students should divide all assignment components within the group to include observations of meetings and other events, informal interviews with the leaders, and review of printed or online materials. It is the group's responsibility to ensure that the workload is distributed fairly. After the completion of the written assignment and oral presentation, students will be asked to assess their level of participation and those of other group members.

In-Class Group Presentation

As part of your in-class presentation, each group should circulate in advance materials (e.g., newspaper articles, reports, handouts) related to the entity. Students will self-review and peer review and critique their own and their fellow students' presentations using a template provided by the instructor. However, responses will be shared only among yourselves, not with the instructor.

Written Group Assignment (8–10 pages)

As part of your in-class presentation, each group will prepare a one-page executive summary of information about the entity or project your group has selected (e.g., name, address, phone, fax, e-mail, website). Incorporate at least four course readings into your written summary.

Questions to be addressed in the 8- to 10-page paper and the 15-minute in-class presentations include the following:

- Who came together and when? Why did they come together? Was it a voluntary, grassroots effort or government-initiated effort? How was it put together? Who came to the table (originally and now)? Are there any divisions, conflicts, or factions within it?

- How are governing and planning decisions made? Are there structures and processes for mediating differences? How are the representatives tied to their organization or agency?
- What are the roles of the leaders and roles of organizers or planners?
- What communication strategies are used, internally and externally?
- How is it funded? Is this sustainable (why or why not)?
- What are the criteria for success or failure? What are the actual or anticipated results or outcomes of the coalition's work thus far?
- How does your analysis of this entity relate to the concepts and case examples related to coalitions and other interorganizational entities in the course readings?
- What community-building or planning tools or skills does your coalition use well? How are these tools or skills used in their process, and what are the outcomes? What tools or skills would you recommend that this coalition adopt to improve its processes and outcomes, and why?
- Reflect on your group's processes, division of labor, leadership, cooperation, and conflict in carrying out this assignment.



Competency 7:

Assess Individuals, Families, Groups, Organizations and Communities

SPECIALIZED MACRO PRACTICE COMPETENCY DESCRIPTION

Macro social work practitioners use appropriate theories, frameworks, models, and strategies to examine and assess communities, organizations, and policies using a strength-based, anti-oppressive, and antiracist lens. In doing so, they critically analyze the historical, social, economic, and cultural context in which macro practice takes place; the current political landscape, including political viability, potential levers for change, and relevant power dynamics; the strengths and needs of affected individuals, groups, families, organizations, and communities; and the social policies and other structural, social, and community forces that create and perpetuate discrimination and oppression. Macro social work practitioners also examine and account for their own biases and interests in conducting assessments. Macro social workers have strong collaboration skills in working with diverse stakeholders and constituencies. The macro social worker synthesizes data-driven approaches with multiple ways of knowing, acknowledging and respecting that indigenous knowledge is essential for effective assessment and lays the groundwork for capacity building.

COMPETENCY BEHAVIORS

Social workers in macro practice

- assess and analyze assets, needs, benefits, gaps in services, rights, and the inequitable distribution of resources and power to identify appropriate macro interventions;

- use power analyses to identify appropriate individual, organizational, community, and political decision makers to target for intervention;
- develop, select, and conduct assessments using appropriate metrics, analytical methods, frameworks, and tools, including primary data sources (e.g., surveys, interviews), secondary data sources (e.g., census, polling, precinct data), and the lived experience of affected individuals, families, groups within organizations, communities, and policy arenas;
- collaborate with community members, professional colleagues, and political stakeholders throughout the assessment process;
- prepare reports that summarize and analyze collected data and frame options for intervention;
- design and conduct assessments of the structure, composition, process, and environmental factors that affect organizational performance and community and policy practice activities.

CURRICULAR RESOURCES MAPPED TO COMPETENCY DIMENSIONS

<i>Readings</i>	
Resource	Competency Dimension
ARTICLES	
The Grantmaker Forum on Community & National Service. (2003). The cost of a volunteer: What it takes to provide a quality volunteer experience. (2013). Retrieved from http://www.pacefunders.org/publications/pubs/Cost%20Volunteer%20FINAL.pdf	Knowledge Values Skills
Coulton, C., Chan, T., & Mikelbank, K. (2011). Finding place in community change initiatives: Using GIS to uncover resident perceptions of their neighborhoods. <i>Journal of Community Practice, 19</i> (1), 10–28.	Knowledge Values Skills
Cummins, L. K., Byers, K. V., & Pedrick, L. (2011). An ethic of care policy analysis framework (pp. 230–239). In <i>Policy practice for social workers: New strategies for a new era</i> . Boston, MA: Allyn & Bacon.	Knowledge Values Skills

(continued)

Readings (continued)

Resource	Competency Dimension
Haski-Leventhal, D., Hustinx, L., & Handy, F. (2011). What money cannot buy: The distinctive and multidimensional impact of volunteers. <i>Journal of Community Practice, 19</i> (2), 138–158.	Knowledge Values Skills
Hill, K. (2008). A strengths-based framework for social policy: Barriers and possibilities. <i>Journal of Policy Practice, 7</i> (2–3), 106–121.	Knowledge Values Skills
Leap of Reason Ambassadors Community. (2006, November). <i>Performance Imperative Organizational Self-Assessment (PIOSA): Principles and proof points (Prototype)</i> . Document, workbook, and supporting information available for download at http://leapambassadors.org/products/piosa/?utm_source=iac+outreach+email&utm_campaign=bcf&utm_medium=email&utm_content=BCF+Message+22	Knowledge Skills
McCambridge, R. (2012, August 15). External influences on nonprofit management: A wide angle view. <i>Nonprofit Quarterly</i> . Retrieved from https://nonprofitquarterly.org/2012/08/15/external-influences-on-nonprofit-management-a-wide-angle-view/	Knowledge
McKnight, J., & Krezmann, J. (2003). <i>Introduction to asset mapping resource</i> . Chicago, IL: ABCD Institute. Retrieved from http://www.sesp.northwestern.edu/images/kelloggabcd.pdf	Knowledge Values Skills
Mulroy, E. A. (2004). Theoretical perspectives on the social environment to guide management and community practice: An organization-in-environment approach. <i>Administration in Social Work, 28</i> (1), 77–96.	Knowledge
Nonprofits Assistance Fund ratio calculation worksheet (Excel). Available at https://nonprofitsassistancefund.org/resources/item/ratio-calculation-worksheet	Knowledge Values Skills Cognitive and Affective Processes
Timm, T., Birkenmaier, J., & Tebb, S. (2011). The Experiential Community Assessment Project: Integrating social work practice skills. <i>Journal of Community Practice, 19</i> (2), 175–188. doi:10.1080/10705422.2011.569649	Knowledge Values Skills Cognitive and Affective Processes

(continued)

Readings (continued)

Resource	Competency Dimension
What financial reports do management and the board need? Community Resources Exchange. Retrieved from https://www.crenyc.org/wp-content/uploads/2016/11/Financialreportsmanagementandboardneed.pdf	Knowledge Values Skills Cognitive and Affective Processes
BOOK CHAPTERS	
Kraft, E. K., & Furlong, S. R. (210). Assessing policy alternatives. In <i>Public policy: Politics, analysis, and alternatives</i> (Chapter 6). Washington, DC: CQ Press.	Knowledge Values Skills
Lane, S. R., & Pritzker, S. (2018). Getting on the agenda: Assessing the political context and developing political strategy. In <i>Political social work: Using power to create social change</i> (Chapter 5). New York, NY: Springer International Publishing.	Knowledge Skills
McLaughlin, T. A. (2016). Financial assessment ratios. In <i>Streetsmart financial basics for nonprofit managers</i> (4th ed., pp. 67-88). Hoboken, NJ: Wiley.	Knowledge
Renz, D. O., & Associates (Eds.). (2010). <i>The Jossey-Bass handbook of nonprofit leadership and management</i> (3rd ed.) San Francisco, CA: Jossey-Bass. Multiple chapters have relevance to nonprofit organization assessment.	Knowledge Values Skills
Salomon, L. M. (2010). The changing context of nonprofit leadership and management. In D. O. Renz & Associates (Ed.), <i>The Jossey-Bass handbook of nonprofit leadership and management</i> (3rd ed., pp. 77-100). San Francisco, CA: Jossey-Bass.	Knowledge
BOOKS	
Kettner, P. M., Moroney, R. M., & Martin, L. L. (2017). <i>Designing and managing programs: An effectiveness-based approach</i> (5th ed.). Los Angeles, CA: SAGE.	Knowledge Skills
Kleinman, A. (1980). <i>Patients and healers in the context of culture</i> . Berkley, CA: University of California Press.	Knowledge Skills

(continued)

Readings (continued)

Resource	Competency Dimension
Martin, L. L. (2016). <i>Financial management for human service administration</i> . Long Grove, IL: Waveland Press.	Knowledge
Netting, E. F., Kettner, P. M., McMurtry, S. L., & Thomas, L. M. (2017). <i>Social work macro practice</i> (6th ed., Chapters 4 and 8). Boston, MA: Pearson.	Knowledge
Soriano, F. I. (2013). <i>Conducting needs assessment: A multidisciplinary approach</i> (2nd ed.). Thousand Oaks, CA: SAGE.	Knowledge Values Skills Cognitive and Affective Processes
Weil, M. (2013). <i>Handbook of community practice</i> (2nd ed., Part II, Section C: Planning). Thousand Oaks, CA: SAGE.	Knowledge Values Skills Cognitive and Affective Processes

Media

Resource	Competency Dimension
Board Composition Matrix. Available at https://boardsource.org/fundamental-topics-of-nonprofit-board-service/composition-recruitment/board-recruitment/envision-ideal-board/	Knowledge Skills
Center for Applied Research and Environmental Systems (CARES). (2017). Community Commons. Community Health Needs Assessment. University of Missouri, Columbia. Retrieved from https://assessment.communitycommons.org/CHNA/About.aspx	Values Skills
Community Needs Assessment Walking Survey. Available at http://nyam.org/media/filer_public/8d/b8/8db80261-6e34-42f8-924f-23fd8dbe77a3/community-needs-assessment-walking-survey-online-version.pdf . Adapted from the New York Academy of Medicine (2010).	Knowledge Values
Community Foundation of Southern Indiana. (2016, April 21). <i>Community needs assessment</i> [YouTube video]. Retrieved from https://www.youtube.com/watch?v=hi1pHf8LFb4	Knowledge Values

(continued)

Media (continued)

Resource	Competency Dimension
<p>Evidence-based Practice Assessment: Toolkit for assessing evidence-based practice for cultural competence.</p> <p>Samuels, J., Schudrick, W., & Altschul, D. (n.d.). <i>Toolkit for modifying evidence-based practices to increase cultural competence</i>. Orangeburg, NY: Center for Excellence in Culturally Competent Mental Health, The Nathan Kline Institute for Psychiatric Research. Retrieved from http://calmhsa.org/wp-content/uploads/2013/10/ToolkitEBP.pdf</p>	<p>Knowledge Values Skills Cognitive and Affective Processes</p>
<p>Evidence-based Intervention Assessment. Available at https://store.samhsa.gov/shin/content/SMA09-4205/SMA09-4205.pdf</p>	<p>Knowledge Values Skills Cognitive and Affective Processes</p>
<p>Evidence-based Intervention Assessment Grid. Available at http://networkofpractice.org/sites/default/files/pdf/EBPMatrix.pdf</p>	<p>Knowledge Values Skills Cognitive and Affective Processes</p>
<p>Evidence-based Feasibility Assessment. Assessment to determine feasibility of implementation of new evidence-based treatment approach/readiness for change. Available at http://networkofpractice.org/?q=node/214</p>	<p>Knowledge Values Skills Cognitive and Affective Processes</p>
<p>Hayes, D. M. (Producer & Director). (2017). <i>The rolling mill</i> [Documentary film]. New York, NY: Vimeo. Retrieved from https://www.shortoftheweek.com/2017/08/31/the-rolling-mill/</p>	<p>Knowledge Values</p>
<p><i>Holding ground: The story of the Dudley Street Neighborhood Initiative</i> (1996). Newburgh, NY: New Day Films.</p> <p>This documentary underscores the importance and value of ensuring that those involved in community development are fully engaged in the process from planning through implementation and maintenance.</p>	<p>Knowledge Values Skills Cognitive and Affective Processes</p>

(continued)

Media (continued)

Resource	Competency Dimension
<p><i>Gaining ground: Building community on Dudley Street</i> (2013). Holding Ground Productions.</p> <p>Revisits Dudley Street in the wake of the Great Recessions for further lessons on building community partnerships and alliances.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>PEST (political, economic, social, and technological) and SWOT (strengths, weaknesses, opportunities, and threats) tools for assessing organizations in environment: Alanis Business Academy.</p> <p>How to complete a SWOT analysis (business oriented): https://www.youtube.com/watch?v=0D2ft6obqdg</p> <p>PEST and SWOT templates and explanations: http://www.businessballs.com/swotanalysisfreemplate.htm http://www.businessballs.com/pestanalysisfreemplate.htm</p> <p>SWOT template example (Carolina Mountain Land Conservancy): http://www.carolinamountain.org/sites/default/files/files/Nature%20and%20Commerce/11%20SWOT_analysis_template.pdf</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Program sustainability framework and assessment tool: Center for Public Health Systems Science, George Warren Brown School of Social Work. Available at https://cphss.wustl.edu/Projects/Pages/Sustainability-Framework-and-Assessment-Tool.aspx</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Marguerite Casey Foundation organizational capacity assessment tool. Available at http://caseygrants.org/resources/org-capacity-assessment/</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>McKinsey Organizational Capacity Assessment Tool (OCAT). Available at http://mckinseysociety.com/ocat/</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

(continued)

Media (continued)

Resource	Competency Dimension
<p>Minnesota Department of Human Services, Alcohol and Drug Abuse Division (ADAD). Minnesota Regional ATOD Prevention Coordinators. <i>Wondering where to begin?</i></p> <p>Retrieved from http://rpcmn.org/resources/assessment-resources/</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Nonprofits Assistance Fund ratio calculation worksheet (Excel). Available at https://nonprofitsassistancefund.org/resources/item/ratio-calculation-worksheet</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Resource Assessment</p> <p>Resource on assessment to determine feasibility of implementation of new evidence-based treatment approach and readiness for change in organization. Available at http://networkofpractice.org/?q=node/214</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Resources on Identifying Contemporary Trends and Issues Facing Nonprofits</p> <p>National Council of Nonprofits. Available at https://www.councilofnonprofits.org/</p> <p>Johns Hopkins Center for Civil Society Studies. Available at http://ccss.jhu.edu/</p> <p>Bernholz, L. (2017 and prior years). <i>Philanthropy & the social economy: Blueprint</i>. Available at https://paccenter.stanford.edu/blueprint/</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>TEDxExeter. (2016, May 16). Cormac Russell, <i>Sustainable community development: From what's wrong to what's strong</i>. Retrieved from https://youtu.be/a5xR4QB1ADw</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

<i>In-Class Exercises</i>	
Resource	Competency Dimension
<p>Assessing Teams</p> <p>Case discussion on assessing teams (also applicable to assessing governing boards).</p> <p>See Appendix 7B.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Developing SMART Metrics</p> <p>Instructor provides a short lecture on SMART (specific, measurable, attainable, realistic/relevant, and time bound) metrics and distinguishes the concepts of impact, outputs, outcomes, effectiveness, and efficiency. Instructor then provides a summary of key factors about the school of social work (or other organization), such as mission and vision statements, teaching and community service functions, degree programs, research centers, and other major initiatives. Students are broken into work groups and asked to generate possible metrics to assess impact, effectiveness, and efficiency for each of the major activities of the school. Students share and instructor provides feedback. Retrieved from: http://www.kean.edu/sites/default/files/u7/SMART%20Objectives.pdf</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Eco-Map: The Policy Context</p> <p>Students identify the contextual forces affecting the likelihood that a proposed bill will or will not be enacted and prepare an eco-map. They discuss the implications of the map for advocacy.</p> <p>See Appendix 7C.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Examining the Political Environment</p> <p>In small groups:</p> <ol style="list-style-type: none"> 1. Take a look at the Democratic Party platform (2016) and the Republican Party platform (2016). You can find them both online. 2. Identify and describe 10 differences between them. These could include differences in ideology, emphasis or priorities, language used, topics one addresses and the other doesn't, and different treatment of the same issue (e.g., same-sex marriage, gun rights, health care). <p>Be prepared to discuss these differences as a class. Why do they matter? How can this information help us be effective as advocates? How is it relevant to social work?</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

(continued)

In-Class Exercises (continued)

Resource	Competency Dimension
<p>Financial Analysis</p> <p>After assigned reading and a brief lecture, instructor provides a local nonprofit organization balance sheet (many transparent organizations publish their annual audit). In groups, students compute standard financial ratios.</p> <p>McLaughlin, T. A. (2016). <i>Streetsmart financial basics for nonprofit managers</i> (4th ed., pp. 67-88). Hoboken, NJ: Wiley.</p> <p>Nonprofits Assistance Fund ratio calculation worksheet (Excel). Available at https://nonprofitsassistancefund.org/resources/item/ratio-calculation-worksheet</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>SWOT Analysis</p> <p>See Appendix 7A.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

Assignments

Resource	Competency Dimension
<p>Financial Analysis</p> <p>Instructor provides a prior year balance sheet, “Statement of Activities,” for a local nonprofit organization. Students conduct analysis and prepare a written management report in the form of a presentation to the organization’s board. Report summarizes financial results and key ratios and highlights areas for board discussion.</p> <p>See Appendix 7D.</p>	<p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Assess a Management Policy or Practice</p> <p>Students will identify a management concept, policy, or practice covered in the course, either through a situation in their practicum setting or through a published newspaper article (e.g., organizational structure, volunteer management, or employee engagement). They will explain the situation and concept, policy, or practice, explain how the situation or story illustrates it, and assess how well the organization is performing in relation to evidence and best practices. They will assess the impact of organizational behavior on various stakeholders.</p> <p>See Appendix 7E.</p>	<p>Skills</p> <p>Cognitive and Affective Processes</p>

(continued)

Assignments (continued)

Resource	Competency Dimension
<p>Performance Assessment</p> <p>The purpose of this assignment is to assess your understanding of the concept of organizational performance and your ability to design an assessment strategy for one specific organizational performance matter. See Appendix 7F.</p>	<p>Knowledge</p> <p>Skills</p>
<p>Culturally Competent Programming Assessment</p> <p>Students read the following article:</p> <p>Samuels, J., Schudrick, W., & Altschul, D. (n.d.). <i>Toolkit for modifying evidence-based practices to increase cultural competence</i>. Orangeburg, NY: Center for Excellence in Culturally Competent Mental Health, The Nathan Kline Institute for Psychiatric Research. Retrieved from: http://calmhsa.org/wp-content/uploads/2013/10/ToolkitEBP.pdf</p> <p>Provide a case study that describes the cultural perspective of different groups (see Appendix). Students assess client or constituent needs by using a more inclusive process and assessing potential best, promising, or evidence-based interventions using the toolkit resources. See Appendix 7G.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Walking Community Assessment</p> <p>The community needs assessment walking survey is a tool for small student groups to assess the age-friendliness of a small town or community. See Appendix 7H.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Strength-based Needs Assessment</p> <p>Students will work in groups of four or five to conduct a strength-based needs assessment on a topic of your choosing, in a community that they collectively choose. Given that many students are currently working in the field or have a practicum, they see plenty of social issues on any given day that could be changed. Students will submit a draft introduction to their needs assessment, and feedback will be given to improve the final assessment paper. See Appendix 7I.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Disability Meme</p> <p>This assignment uses online technology to communicate the challenges experienced by people with disabilities, existing policies to support this population, and possible policy changes needed to improve the overall welfare of this group. It could be used in relation to other policy issues, as well. See Appendix 7J.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

(continued)

Assignments (continued)

Resource	Competency Dimension
<p>White Paper or Position Paper</p> <p>In this assignment, students present an argument for a policy or programmatic intervention using a white paper or position paper format. See Appendix 7L.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Legislative Case Study</p> <p>Students deconstruct two policies that were pending at the same time, one that passed and one that failed. They develop a theory as to what forces led each to a different result. See Appendix 7M.</p>	<p>Knowledge, Skills, Cognitive and Affective processes</p>
<p>System of Care Analysis</p> <p>The purpose of this assignment is to describe a need of the population, identify the collection of services that currently exist to address the identified need, and analyze how well the services are addressing the need. The services may be formally coordinated as part of an official system of care, or they may just serve different aspects of the population's need and collectively form a loose, or unofficial, system. See Appendix 7N.</p>	<p>Knowledge</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

Field Activities

Resource	Competency Dimension
<p>Performance Assessment</p> <p>Within the student's practicum setting, they will identify one organization-level performance matter (e.g., caseload/worker ratio, employee turnover, fundraising/administrative expense ratio, volunteer retention rate). Students will design and explain a performance assessment strategy, including an operational definition of performance, the metrics to be used, the data collection strategy, and appropriate benchmarks. In a written summary they will explain why this performance matter is important and the rationale for their assessment strategy. See Appendix 7F.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

APPENDIX 7A: SWOT ANALYSIS

Instructor provides a short lecture and presents a video on SWOT analysis (from Alanis Business Academy). Instructor then provides a summary of key factors about the school of social work, such as mission and vision statements, teaching

and community service functions, degree programs, research centers, and other major initiatives. Students are broken into work groups and asked to identify strengths, weaknesses, opportunities and threats for the school. Students share, building a class SWOT analysis. Instructor provides feedback.

Alanis Business Academy. *How to complete a SWOT analysis*: <https://www.youtube.com/watch?v=0D2fT6obqdg> (business oriented but very clear)

SWOT template example (Carolina Mountain Land Conservancy): http://www.carolinamountain.org/sites/default/files/files/Nature%20and%20Commerce/11%20SWOT_analysis_template.pdf

PEST and SWOT templates: <http://www.businessballs.com/swotanalysisfreetemplate.htm>

<http://www.businessballs.com/pestanalysisfreetemplate.htm>

APPENDIX 7B: ASSESSING TEAMS

Before the assignment, instructor explains three frames for assessing groups: structure, composition, and process.

Two cases are available from Harvard Business Press that could be assigned (note: both are long and complicated) for preparation:

- Wetlaufer, S. (1994). *The team that wasn't*. (case and multiple commentaries)
- Charlier, S. D., & Brennan, M. M. (2013). *Skills for tomorrow: A management team in crisis*. (teaching note also available)

In class, small groups analyze the dysfunctions highlighted in the case, focusing on elements of structure, composition, and process. Groups share insights, and instructor challenges and provides feedback.

Optional: Connect three perspectives to assessing governing board composition.

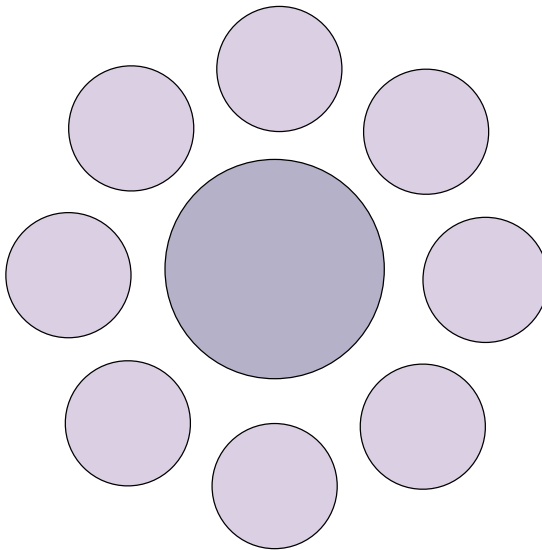
BoardSource. Envision your ideal board. Brief article and link to a board composition matrix: <https://boardsource.org/fundamental-topics-of-non-profit-board-service/composition-recruitment/board-recruitment/envision-ideal-board/>

APPENDIX 7C:
ECO-MAP: THE POLICY CONTEXT

Contributed by Giselle Ferretto

Individually or in small groups:

- 1) Write the name of a proposed or pending bill in the central circle.
- 2) In the circles that surround it, identify the various factors that might influence its likelihood of being enacted (e.g., political climate, media attention).
- 3) Using the key below, show the strength, direction, and relationships of the various influences you've identified.
- 4) Once you have completed the eco-map, discuss how you might use this analysis to inform your advocacy efforts.



Key:

Fill in connections where they exist.

Indicate the nature of the connection with a descriptive word or by drawing a different kind of line:

_____ Strong

- - - - - Tenuous

Arrows can signify major flows of energy or resources.

APPENDIX 7D: FINANCIAL ANALYSIS

The purpose of this assignment is to assess your understanding and ability to read financial reports, extract key data from them, analyze the data, and calculate financial ratios.

Task

You will analyze the financial reports of an organization, assess its current financial situation, and prepare a written report for the agency's governing board that highlights important information and identifies matters (e.g., strengths, weaknesses, risks) that deserve the board's consideration and discussion.

Attached is the previous year's balance sheet and statement of activities for _____.

Based on your understanding of the reports:

- Calculate the financial ratios you believe are relevant. For example, you might examine liquidity, debt to assets, administrative, and fundraising expense.
- Prepare a written report to the board (not to exceed two pages) summarizing the current financial situation and highlighting matters you believe it should consider and discuss.
- Attach any supplementary charts or tables you believe will enhance the board's understanding.

A critical aspect of this assignment is to extract from the wealth of data that which is most relevant to assess and understand the current financial situation and its strengths, weaknesses, and risks. Therefore, you will need to make choices about what data and analyses to include in your report.

Grading will reflect:

- the accuracy of your understanding of the financial data;
- your ability to correctly perform standard ratio calculations;

- your ability to identify key financial performance factors;
- your ability to present a cogent and concise summary of the data and your assessment.

The following resources may be of assistance:

McLaughlin, T. A. (2016). *Streetsmart financial basics for nonprofit managers* (4th ed., pp. 67–88). Hoboken, NJ: Wiley.

Community Resources Exchange. *What financial reports do management and the board need?* Available at: <https://www.crenyc.org/wp-content/uploads/2016/11/Financialreportsmanagementandboardneed.pdf>

Nonprofits Assistance Fund ratio calculation worksheet (Excel). Available at: <https://nonprofitsassistancefund.org/resources/item/ratio-calculation-worksheet>

APPENDIX 7E: ASSESS A MANAGEMENT POLICY OR PRACTICE

The purpose of this assignment is to assess your understanding of concepts covered in the course, their application in real-life situations, and your ability to assess organizational performance in relation to evidence and best practices.

There are two options to complete this assignment:

- 1) Identify a situation within your practicum that illustrates an organizational management concept, policy, or practice discussed in the course.
- 2) Identify a news article (print or online) that illustrates an organizational concept, policy, or practice discussed in the course. If you choose an article, make sure it contains (or you can obtain) enough detail to complete the assignment.

For example, you might look at organizational structure or how volunteers are supervised in your practicum, or find an article that discusses how an organization dealt with employee engagement.

Write a paper, not to exceed three double-spaced pages.

- Briefly explain the situation or attach the article.
- Identify the relevant concept, policy, or management practice (limit your paper to one concept).

- Explain how and why the situation or story illustrates the concept, policy, or practice.
- Discuss and assess how the organization is acting in relation to the concept and whether it is demonstrating best practices.
- Discuss how the organizational behavior is affecting various stakeholders.
- Cite any relevant readings, literature, or material from the course.

Grading will reflect your ability to identify the relevant concept, policy, or practice, explain its relation to the case, and assess how the organization is acting in relation to it and best practices as well as the impact on stakeholders. Use APA style if you cite any literature.

APPENDIX 7F: PERFORMANCE ASSESSMENT

The purpose of this assignment is to assess your understanding of the concept of organizational performance and your ability to design an assessment strategy for one specific organizational performance matter.

Task

Within your practicum setting or a paid employment setting, you will identify one (only one) organization-level performance matter (e.g., caseload/worker ratio, employee turnover, fundraising/administrative expense ratio, volunteer retention rate). You will design and explain a performance assessment strategy:

- a. Provide an operational definition of performance.
- b. Specify and define the metrics to be used.
- c. Explain your data collection strategy, specifying the data to be collected, sources of data, and the methods of collection and prepare a draft of any tools (e.g., surveys, interview schedules, spreadsheets) you will use for data collection.

- d. Identify any benchmarks that could be used appropriately, based on available industry, community, research or best practices data.

In a summary not to exceed two pages, explain why this performance matter is important and the rationale for your assessment strategy.

APPENDIX 7G: CULTURALLY COMPETENT PROGRAMMING ASSESSMENT

Reading: Samuels, J., Schudrick, W., & Altschul, D. (n.d.). *Toolkit for modifying evidence-based practices to increase cultural competence*. Orangeburg, NY: Center for Excellence in Culturally Competent Mental Health, The Nathan Kline Institute for Psychiatric Research. Retrieved from: <http://calmhsa.org/wp-content/uploads/2013/10/ToolkitEBP.pdf>

Assessing a Situation

You are a new social worker from a community clinic. You work with the doctors and nurses to educate community members about mental health services. You've noticed over time that certain cultural groups do not access the outpatient mental health services offered despite your awareness that it is an issue. You want to learn more about the community of interest to develop services that would be accessible by the client group from a particular culture. You will be searching the literature for evidence-based practice intervention models, but first you want to better understand the community on key issues.

Picking a population: Read the Somali Refugee Profile.

Your charge: Your job is to better understand the client population so that you will be able to use the information to develop a culturally responsive and accessible mental health intervention program.

There are two parts to this exercise:

- Gain a better understanding of the problem. You do not need to answer all of the questions on pp. 2 and 3 but should instead use them as a guide to how you would go about understanding the problem from the target client or community perspective.

- Identify cultural brokers who may be possible partners in the community you choose. Use the “Identifying Cultural Brokers” questions below for this exercise.

Use the Kleinman Explanatory Model (1980) series of questions below.

Assessing Cultural Values and Adapting Programs Accordingly

Complete the tables below to assess the cultural values of the intended client group and consider how you might adapt the program. You may have to be creative to fill in the second column, given the limitations of the case study.

Use the “Tables on Factors That May Vary by Culture and May Impact Mental Health Services” that are listed in the toolkit used for the class reading. Specifically look at overall perception of mental health, cultural values and factors in general, and ability to access services.

1A. Gain a Better Understanding of the Problem: Identifying Cultural Brokers

Develop a plan for engaging the target community through key contacts and cultural brokers.

- How might you identify contacts within the community? Individuals?
Organizations?

What would be a good plan for:

- Expanding your contacts in the community?
- Learning more about organizations and individuals?
- Gaining an understanding of any issues the community may have about your organization that might affect effective engagement?
- What information and issues will you share that will interest the community in working together on the specific issue?

1B. Gain Better Understanding of the Program: The Community Perspective. Kleinman's Explanatory Model

A working group that is participating in the analysis, design, and planning of a program is an excellent vehicle for understanding the cultural community's perspectives on the identified problem. Kleinman (1980) and others pose the following questions in order for clinicians and programmers to understand how individuals from cultural groups view the issue. Use the following worksheet within the working group session to develop an understanding of the problem.

- What is the problem?
- How prevalent is it in the community? Look up statistics on the target population.
- Who within the cultural group is experiencing the problem? Men, women, youth, other? Whom will you focus on?
- What does the community call this problem?
- What does the community identify as the causes of this problem?
- Why did this problem develop in the community when it did?
- What does this problem do? How does it work?
- How severe is the problem? Does it have a short or long course?
- What kind of treatment is appropriate for this problem? How can this organization help?
- Whom does the community usually turn to for help? Who is involved in decision making?
- What are the most important results to receive from treatment?
- What are the chief problems caused by this problem?
- What is the biggest fear about the problem?

2A. Considering the Cultural Values of the Community Program

Name: _____

Use the planning tool to better understand the cultural group of interest on key cultural values and factors. This table focuses on health and mental health, but it can be adapted for other needs you are addressing.

Cultural Values and Factors	Cultural Group's Perspective on These Key Values and Factors	What Should the Program Consider? What Programs May Fit, or How Could You Adapt Programs?
View of Health and Mental Health		
Holistic health view		
Attribution		
Degree of stigma		
Social Positioning		
Discrimination		
Equality		
Stereotypes		
Acculturation		
Formality		
Lifestyle		
Housing		
Education		
Social Class		
Development through life		

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CULTURAL FACTORS		
Age		
Gender		
Dating		
Marriage		
Divorce		
Sexual activity		
Sexual orientation		
Other health problems		
Use of drugs, alcohol, and tobacco		
Specific health problems		
Family and Kin Relationships		
Disciplining children		
Power in relationships		
WORLDVIEW		
Religion and religious practice		
Views of interconnectedness of people		
View of nature		
Locus of control		
Outlook		

2A/B. Consider Structural Components of Access That May Require Modification

Examples of components listed in this table may be affected by structural access; additional operational aspects may be affected (process/operational access, engagement, work, termination/discharge) and should be noted in the “Phases to Be Altered” column to track changes. Delete and add components as is applicable for your program assessment.

Component	Program Components	Components to Be Altered
Locations	(For example, program is offered in downtown Baltimore)	(For example, the program is not accessible by target community. We need to develop site in local community or create site along bus line.)
Transportation		
Building		
Hours		
Language		
Payor		
Intervention-specific training and materials		
Who is included in treatment		
Payor		
Provider		
Phases of Operation Component	Phases of Program	Phases to Be Altered
Initial relationship building		
Assessment: diagnostic and cultural		
Contracting		

APPENDIX 7H: WALKING COMMUNITY ASSESSMENT

Adapted from the New York Academy of Medicine. (2010). *Community needs assessment walking survey*. Available at http://nyam.org/media/filer_public/8d/b8/8db80261-6e34-42f8-924f-23fd8dbe77a3/community-needs-assessment-walking-survey-online-version.pdf.

This survey is a tool for small student groups to assess the age-friendliness of a small town or neighborhood. Focusing on such areas, the presence of retail amenities, and the availability of community services, the survey is designed to be completed by students walking five blocks and recording their observations. The observations when compiled can be used to discuss areas in need of improvement.

- 1) Date: ____/____/____
- 2) Day of the week: _____
- 3) Start time: _____ am/pm End time: _____ am/pm

Amenities

- 1) *Grocery Stores or Supermarkets*: How many grocery stores or supermarkets did you pass? _____
- 2) *Convenience Stores at Gas Stations*: How many convenience stores in gas stations did you pass? _____
- 3) *Laundromats*: How many laundromats did you pass? _____
- 4) *Beauty Shops*: How many beauty shops, nail salons, or barbershops did you pass? _____
- 5) *Banks*: How many banks or credit unions did you pass? _____
- 6) *Worship*: How many places of worship did you pass? _____
- 7) *Senior Centers*: How many senior centers did you pass? _____
- 8) *Social Clubs*: How many social clubs, fraternal clubs, or veterans' organizations did you pass? _____

9) *Parks and Community Gardens*: How many public parks or community gardens did you pass? _____

Services

- 1) *Community-Based Organizations (CBOs)*: Did you pass community, social service, or nonprofit organizations? *Check all that apply.*
- Community health or mental health clinics
 - Charitable organizations (e.g., Salvation Army, YMCA)
 - Children and family centers (e.g., Boys & Girls Clubs)
 - Settlement houses
 - Food pantries or soup kitchens
 - Public assistance or job centers
 - Private medical clinics
 - Dental clinics

APPENDIX 7I: STRENGTH-BASED NEEDS ASSESSMENT

Students will work in groups of four or five to conduct a strength-based needs assessment (for more please visit: <https://www.iriss.org.uk/resources/insights/strengths-based-approaches-working-individuals>). The assessment will be on a topic of your choosing, in a community that you collectively decide on. Given that many students are currently working in the field or have a practicum, they see plenty of social issues on any given day that could be changed. Students will submit a draft introduction to their needs assessment, and feedback will be given to improve the final assessment paper.

Assignment 1

Select a social work practice situation you are familiar with or a social problem that you are passionate about. Next, identify the community where you will conduct the needs assessment. You will develop the problem statement and goal and identify data sources to support your claim of the problem.

Assignment 2 (1–2 pages)

Identify the client-level target system and an action system for a social work intervention at the client and family level. Next, identify target and action systems at three larger system levels. Choose three from the following systems: neighborhood, organization, interorganizational (network), or policy level. Remember that the target and action systems must be different at each level. Use class materials and text for information on target and action systems.

The purpose of this assignment is for you to analyze a problem at three large system levels to establish an appropriate goal at each level, identify the target and action for each level, and think about ways to get an action system actively involved.

Assignment 3

Sign up to meet with instructor to discuss Assignments 1 and 2 after you have turned them in.

Draft Needs Assessment/Outline (3–4 pages)

Due in D2L. Detailed rubric and outline will be posted in the content area of D2L.

Comprehensive Strength-Based Needs Assessment (12–14 pages)

After you have formalized your groups, there will be a detailed project description, expectations, and rubrics found in the content area. You will be expected to meet weekly with your group, assign tasks, provide charts and graphs with data you collect to support your need for change, and make recommendations on the next steps.

APPENDIX 7J: DISABILITY MEME

Contributed by Richard Glaesser

Instructions

- 1) Create a meme using Meme Builder (<http://www.memecenter.com/memebuilder>) to demonstrate your perception of how America views disability. Please keep in mind that disability can involve physical and mental disabilities.
- 2) Draft a three-paragraph analysis that cites a current policy on disability (e.g., Americans With Disabilities Act), sources evidence-informed data on the policy's effectiveness (or lack thereof), and describes the macro and micro impact on people with disabilities.
- 3) Finally, draft two paragraphs that apply and provide some analysis of your meme through two theoretical lenses: the medical model of disability and the social model of disability. In other words, using the view of disability as described in your meme, explain what can be said through the lens of a medical model or social model of disability.
- 4) Once completed, upload your meme and five paragraphs to the Discussion Board.
- 5) Provide two responses to two student colleagues, recommending a shift in policy to improve the social well-being of this vulnerable group. Be sure to include citations and references.

APPENDIX 7K: COALITION MEETING ANALYSIS

Format

The introduction to your paper should include the meeting date, time, and place, as well as the sponsoring organization and overview of the agenda.

In the body of the paper, make sure to discuss each of the following themes. To help you in the process, under each theme is a set of questions that you could include in your discussion.

Meeting Content

- What was the content of the meeting?
- What policy issues were discussed during the meeting?
- How did the issues discussed at the meeting relate to social, economic, or political change or equity?

Meeting Power Dynamics

- Who seemed to define the agenda?
- Who was doing most of the talking? Why?
- If community residents were present, how was (or wasn't) their voice present or recognized in the meeting? How did they participate in the policy discussions (frequency, intensity, driving the agenda)?

Meeting Effectiveness

- Was the meeting effective? Why or why not?
- Did the meeting seem to be part of a larger overall strategy for policy change? How?
- What would you have done to make the meeting more effective?

The paper should be 7-10 double-spaced pages.

APPENDIX 7L: WHITE PAPER OR POSITION PAPER

What Is a White Paper or Position Paper?

A position paper, sometimes called a white paper, is a clear summary of complex ideas and facts regarding a social problem and its potential solution, with fairness to all positions. These papers are produced by government agencies to present evaluative data and policy options to decision makers (e.g., a congressional committee). Policy interest groups write position papers to influence the development of government policies. In the nonprofit arena, when

key stakeholders gather to share data and experiences regarding a social problem, a white paper may be written at the close of the group to record findings and recommendations. Position papers are also written by professional organizations, such as NASW, to provide information and influence debate on topics that are relevant to the mission of the organization.

Assignment Instructions

For your final assignment, choose and analyze a socioeconomic problem that is affecting the well-being of a community or group of people. This problem can be located within an organization or neighborhood or on the municipal or state level. The problem should be associated with concrete socioeconomic policies or programs. Before writing your paper, thoroughly explore the problem by gathering data and other forms of evidence through research relating to the problem, analyzing conditions surrounding it, identifying opportunities, and considering options for addressing the problem. If funding or resources are central to this issue, be sure to gather data in that area as well. After engaging in this research, identify and describe what you perceive to be the most effective and viable solution. Then choose an audience to be the recipients of your paper, such as a state legislative committee, the CEO of an agency, one or more members of an association or coalition, a community organization, or the public. Write the paper with the purpose of influencing *this specific audience*.

Examples of socioeconomic problems:

- financial challenges affecting a human service program
- high unemployment in a low-income neighborhood
- lack of affordable healthcare
- underfunded educational systems
- gaps in funding for human services or human needs
- funding formula challenges in a specific service delivery area
- a town with a high budget deficit
- lack of affordable housing in a city

- cost challenges associated with a human needs-related program
- economic issues affecting at-risk families
- financial literacy

APPENDIX 7M: LEGISLATIVE CASE STUDY

(Note: The assignment describes the use of the repeal of “Don’t Ask, Don’t Tell” and the “DREAM Act,” but it can be used with any NASW-supported bills that were considered during a legislative session.)

To understand how policy change occurs, we will be deconstructing two legislative proposals supported by NASW: the repeal of “Don’t Ask Don’t Tell” and the “DREAM Act.” Both were considered by Congress at the same time; one succeeded and the other failed.

- 1) Students will form teams; each team will be assigned one of the two initiatives identified above.
- 2) Using the published literature, online sources, interviews, and media accounts, students will explore how the myriad factors that typically influence policy (including political climate, economic climate, stakeholders, media, legislative support, religious values, social values, research findings, world events, competing issues, timing, and feasibility of implementation) might have affected the success or failure of their assigned initiative.
- 3) As each group explores its initiative in depth, students will educate the rest of the class by sharing key resources, information, and discoveries on Google Docs.
- 4) As the culmination of this exercise, each student will submit a thoughtful, well-researched, and well-written analysis (8–12 pages) that advances the student’s own theory regarding why one bill passed and the other failed.

Information that forms the basis for your conclusions can be derived from research and analysis provided by classmates, independent research and

exploration, material from the textbook, interviews with congressional staff and advocates, and other reputable sources. Your grade on this project will be based on your individual contributions to the process and the quality of your final paper.

APPENDIX 7N: SYSTEM OF CARE ANALYSIS

The purpose of this assignment is to describe the need of the population, identify the services that currently exist to address the need you have identified, and analyze how well the services are addressing the need. The services may be formally coordinated as part of an official system of care, or they may just serve different aspects of the population's need and collectively form a loose or unofficial system.

Your goal is to make a clear and compelling case for the need you have addressed, explain how that need is currently being met, explain how the causes of the needs are or are not being addressed, and reflect on how well the population's needs are met by the current system and propose some changes. The changes you can propose may be, but are not limited to, new services if there is a gap in services, changes in the location or delivery of services, policy changes that need to be made to allow the gap to be addressed, or better coordination of services.

You will also discuss some possibilities for changes to the system of care that, based on what you have learned about the need and the service system, would result in the population's needs being better or more efficiently met. You will also explain why you think the changes would better or more efficiently meet the population's needs.

The paper should include the following:

- 1) A concise problem statement:
 - What is a significant problem the community is experiencing?
 - Who is affected?
 - What are the consequences of the problem?

- How do we know it is a problem? Are there data to support this claim (e.g., American Community Survey, studies, public records, surveys from the people)?
 - Why is it a problem? The “why” question may touch on values, implications, social norms, changing norms, or other explanations of why your issue is a problem.
- 2) An explanation of the needs of the community or population, including the following:
- What type of need is this (normative, perceived, expressed, relative)?
 - Identify and provide supporting evidence for this problem that the community is experiencing. That is, how do we know it is a problem in *this* community or with *this* population?
 - How extensive is the problem? How many people are immediately affected by it? Are there people who are secondarily affected by this problem? How severe is this problem in this community?
 - What are the long-term implications of not addressing this problem? That is, why should we all care?
- 3) Why we should address this need.
- What are the short- and long-term implications of not addressing the need?
- 4) The cause of the problem.
- Why is this problem happening now? Try to get to the root of the problem in this section and do not simply rely on demographic characteristics (e.g., the problem is not just that people are poor).
 - What is the prevalence of these causes? Is there a cause for that cause? (For example, if the problem is crime, and part of the cause of the crime is drug use, what are some of the causes for drug use that can be identified? Has the prevalence of these causes changed recently?)

- 5) The types of formal services that are in place to address this need. A given problem might need several different types of services, and each service may have more than one provider.
- 6) Who the providers are.
 - Who pays for services (e.g., state funds, Medicaid, private funds)?
- 7) Based on what you know about the need and the causes of the problem, how well existing services meet the needs of the community or affected population.
 - Are there gaps in the services that are available?
- 8) How easy it is for the affected population to access these services. Consider *where* services are offered geographically, the availability of services, and other barriers and facilitators to service use.
- 9) The strengths and limitations of this system of care.
- 10) Your recommendations for change.
- 11) The stakeholders for this change. Stakeholders may include people experiencing the problem, other community members, service providers, public officials, the police, researchers and academics, and so on. How would you involve these different groups and actors in a change process?

APPENDIX 7O: ECOLOGICAL ANALYSIS OF A SOCIAL AGENCY

Ecological Analysis

On your first day going to your field placement (or thinking back to the first day on the job), pay close attention to the environment and the material culture of the agency and the surrounding area. Record your reactions to the agency without talking to anyone. Include your first impressions only using your five senses (i.e., what you see, hear, taste, touch, and smell).

Use your five senses to describe the aesthetic and emotional impact that the agency has on you as you enter the neighborhood or surrounding area; as you approach the building or facility from the outside; as you enter the agency; as you locate social work (or your department or program) within the agency; or as you locate or enter your space or seat. Specifically:

- What do you see? How do you react to what you see? What’s making you feel that way?
- What do you hear? What are the sounds in the setting? What is your reaction to those sounds? Why do you feel that way?
- What do you smell? What is your reaction to the odors or lack thereof?
- What do you “taste”? Does the agency leave a good or bad “taste in your mouth”? Why?
- What do you feel? What are the tactile sensations? Hard or soft? Cold or hot? What is your reaction to what you feel?
- What’s your sixth sense? What do you intuit about the agency? Social work? Clients, staff?

This assignment asks you to provide your first impressions of agency and speculate about the policies that shaped its ecological organization. Using sensory evidence only, answer the following questions:

- 1) What statement is the agency making about itself, its place in society currently and in the past, its place in the community, and in that neighborhood?
- 2) What statement is the setting making about its clients or patients, staff (executive, professional support) students, and visitors or outsiders?
- 3) Whose (which groups) needs are being met, and not being met, by the agency? Whose needs are paramount?
- 4) What assumptions are clients, staff, and the public likely to make about the policies, practices, and power relationships of the agency?
- 5) Are clients’ rights valued and enforced?

- 6) Is the agency inviting or repelling? Does it like what it does? Is it proud of what it does?
- 7) Does the agency value its clients, its staff, others?
- 8) Do staff value clients, the agency, others?
- 9) Is social work valued? Are students valued?

You will be able to make preliminary judgments, which may be reinforced or revised over time. You will know how you feel about the setting and quickly develop a sense of your surroundings. You can and should use empathy (i.e., given your reactions, how do you think the client or staff might react?). Do not assume that others necessarily see the world the way you do (e.g., what is warm and inviting to you may be intimidating or repelling to others). Class, race, position, status, and power shape our reactions to our environment and what we place and value in our environment.

This assignment sensitizes you to separate your observations of and reaction to something from a judgment about its meaning in the environment. For example, the door of the executive director's office is open. Is it to encourage access to him or her or is it for surveillance, so that he or she can see what's going on? There are security guards at the agency's entrance. Is it to keep people in or out? There are no signs identifying the agency on the outside. Is it to be invisible to the community or to discourage potential clients? Could it be to protect client confidentiality?

Suggested Items to Pay Attention To

- 1) *On the way to the agency:* Observe the neighborhood surroundings, the agency, and the building housing the agency. Compare differences or similarities between outside and inside, architecture, age, building materials, billboards, signs, entrances, type of people, housing, residential or commercial, dress and color of the people, street sounds, street people.
- 2) *Boundaries:* Consider how the roles and status of those entering change and the ease or difficulty of becoming a client or a staff member.

3) *Guide to internal layout:*

Sights

- colors, lighting;
- arrangement of space; staff and executive offices, public areas, client service areas;
- allocation of space: layout, separation of space; access to bathrooms, services, and office functions;
- arrangement of furniture; items on the walls, on desks;
- personal artifacts consuming space: signs and symbols, calendars;
- quality of space: dirty, clean, age of space;
- adequacy of space; crowded or empty;
- mobility of space: fixed or movable, temporary, permanent, disjunctive (i.e., past space imposed on current function);
- personal spaces;
- people moving through space;
- use of space; congregate areas, private or off-limit spaces;
- appearance of staff and clients: clothing, nametags, costumes, and uniforms.

Sounds

- human voices: spoken languages, hums, laughter, shouting;
- noise, decibel level, commotion, “sounds of silence,” cacophony; amplified, machinery, music.

Smells

- odors: natural, artificial, perfumes, and other scents, bodily functions;
- aroma of food; flavors, fresh, rotting;
- other aromas, variations of smells throughout the agency.

Taste

- food and eating arrangements;
- tasty environment; leaves one with a good taste.

Touch

- proximity of “bodies”: people touch (e.g., handshakes, hugs);
- temperature: hot or cold, variations and control;
- other tactile sensations;
- texture of walls, floors, ceilings (hard or soft).



Competency 8:

Intervene With Individuals, Families, Groups, Organizations, and Communities

SPECIALIZED MACRO PRACTICE COMPETENCY DESCRIPTION

Macro practitioners use research-informed evidence to address the root causes of social problems and incorporate indigenous knowledge of affected populations, communities, and organizations with their participation. Effective interventions with organizations, with communities, and in the policy arena build on successful engagement with stakeholders and constituencies, as well as the assessment of social, economic, and political contexts. Using collaborative and interdisciplinary processes, macro practitioners design and implement positive change interventions that are strategic and reflect the profession's values of social, economic, and environmental justice. Macro practitioners work to ensure that interventions combat systemic oppression and injustice that permeate our organizations and society and that often become institutionalized through social policies.

Macro social workers use cutting-edge professional knowledge to apply evidence-informed interventions at local, state, and national levels. They build power and capacity for positive social change by effectively managing human service organizations and delivery systems; educating, mobilizing, and organizing for community planning and development; and shaping social policies.

COMPETENCY BEHAVIORS

Social workers in macro practice

- select and implement theoretically and empirically informed interventions to achieve community, organizational, and policy goals that enhance well-being for clients and constituencies;

- negotiate, mediate, and advocate with and on behalf of diverse clients and constituencies and facilitate their participation in macro interventions;
- identify the strengths, expertise, and potential contributions of relevant stakeholder groups (e.g., coalitions, think tanks, organizations, associations, voters, and affected constituencies) to collectively exert power for social change;
- initiate and facilitate interprofessional collaborations within and between organizational, community, and policy partners to achieve positive system change;
- build and effectively manage organizations that initiate and sustain positive social change interventions;
- apply intervention skills to develop and revitalize social, economic, and environmental assets and build community capacity;
- draw on policy analyses and a nuanced understanding of policy processes and contexts to develop advocacy strategies;
- create opportunities for input and influence by identifying and using relationships with policymakers and staff and recognizing and taking advantage of windows of opportunity;
- formulate educational materials and deliver persuasive arguments through written and oral communications, such as fact sheets, case vignettes, and testimony.

CURRICULAR RESOURCES MAPPED TO COMPETENCY DIMENSIONS

<i>Readings</i>	
Resource	Competency Dimension
ARTICLES	
Brady, S. R., & Lesniewski, J. (2018). Rabble rousing in a red state: Lessons learned from organizing for worker rights in conservative spaces and places. <i>Journal of Community Practice, 26</i> (2), 236–251.	Knowledge Values Cognitive and Affective Processes
Kleinkauf, C. (1981). A guide to giving legislative testimony. <i>Social Work, 26</i> (4), 297–303.	Skills
Pérez Jolles, M., McBeath, B., Carnochan, S., & Austin, M. J. (2016). Drivers of management innovation in public human service organizations. <i>Human Service Organizations, 40</i> (4), 421–430.	Knowledge Values Cognitive and Affective Processes
Rose, S. J. (1999). Social workers as municipal legislators: Potholes, garbage and social activism. <i>Journal of Community Practice, 6</i> (4), 1–15.	Knowledge
Schmid, H. (2004). Organization–environment relationships. <i>Administration in Social Work, 28</i> (1), 97–113.	Knowledge Values Cognitive and Affective Processes
BOOKS	
Goldkind, L., & McNutt, J. (2014). Social media & social change: Nonprofits and using social media strategies to meet advocacy goals. In A. M. Lucia-Casademunt & J. A. Ariza-Montes (Eds.), <i>Information communication technologies (ICT) Management in nonprofit organizations</i> (pp. 56–72). Hershey, PA: IGI Global.	Knowledge Values Cognitive and Affective Processes
Healy, M., & Sofer, G. (2014). Policy advocacy at the federal level: A case study of Americorps--how the little guys won. In M. Reisch (Ed.), <i>Social policy and social justice</i> (pp. 237–257). Thousand Oaks, CA: SAGE.	Knowledge Skills

(continued)

Readings (continued)

Resource	Competency Dimension
Jansson, B. (2018). Developing political strategy and putting it into action in the policy-enacting task. In <i>Becoming an effective policy advocate: From policy practice to social justice</i> (8th ed., Chapter 11). Belmont, CA: Brooks/Cole.	Skills
Levine, B. J. (2009). Designing and executing a lobbying campaign, In <i>The art of lobbying: Building trust and selling policy</i> (Chapter 7). Washington, DC: CQ Press.	Skills
Mizrahi, T. (2015). Community organizing principles and practice guidelines. In K. Corcoran (Ed.), <i>Social workers' desk reference</i> – (3rd ed., Chapter 115, pp. 894–906). New York, NY: Oxford University Press.	Skills Values
Richan, W. (2006). Setting an action agenda. In <i>Lobbying for social change</i> (3rd ed., pp. 37–57). New York, NY: Routledge.	Skills
Reisch, M. (2015). Legislative advocacy to empower oppressed and vulnerable groups. In K. Corcoran (Ed.), <i>Social workers' desk reference</i> (3rd ed.). New York, NY: Oxford University Press.	Knowledge Values Skills
Rothman, J. (2008). Approaches to community intervention. In J. Rothman, J. L. Erlich, & J. E. Tropman (Eds.), <i>Strategies of community intervention</i> (7th ed., pp. 27–64). Itasca, IL: F. E. Peacock. Retrieved from http://loveandencourage.com/sw%20223%20Approaches%20to%20Community%20Intervention%20-%20Jack%20Rothman.pdf	Knowledge Values Cognitive and Affective Processes
BOOK CHAPTERS	
Bailey, D., & Koney, K. M. (2000). <i>Strategic alliances among health and human services: From affiliations to consolidations</i> . Thousand Oaks, CA: SAGE.	Knowledge Values Cognitive and Affective Processes
Friedman, B. D., & Allen, K. N. (2014). Systems theory. In J. Brandell (Ed.), <i>Essentials of clinical social work</i> (pp. 3–20). Thousand Oaks, CA: SAGE.	Knowledge Values Cognitive and Affective Processes
Netting, E. F., Kettner, P. M., McMurtry, S. L., & Thomas, M. L. (2016). <i>Social work macro practice</i> (6th ed.). Boston, MA: Pearson.	Knowledge Values Skills

(continued)

Readings (continued)

Resource	Competency Dimension
Stroh, D. P. (2015). <i>Systems thinking for social change</i> . White River Junction, VT: Chelsea Green Publishing.	Knowledge Skills
Weil, M. (2013). <i>Handbook of community practice</i> (2nd ed., Parts II & IV). Thousand Oaks, CA: SAGE.	Knowledge Values Skills
Weinbach, R. W., & Taylor, L. M. (2015). <i>The social worker as manager: A practical guide to success</i> (7th ed.). Boston, MA: Pearson/Allyn and Bacon.	Knowledge Values Cognitive and Affective Processes

Media

Resource	Competency Dimension
Creating infographics. Available at http://www.makeuseof.com/tag/awesome-free-tools-infographics/ https://piktochart.com/ https://venngage.com/	Skill
Grant-writing step by step. Available at https://www.youtube.com/watch?v=ByQRri_LTUE	Knowledge Values Skills Cognitive and Affective Processes
<i> Holding Ground</i> (1996, 2004) and <i> Gaining Ground</i> (2013). New Day Films. Videos on the Dudley Street Neighborhood Initiative in the Roxbury neighborhood in Boston. Shows community in social action, social planning, community development, policy practice, collaboration/partnership, and community meetings and outreach.	Knowledge Values Cognitive and Affective Processes
Wellstone Action Campaign Plan. Available at http://www.wellstone.org/resources/sample-campaign-plan	Knowledge Values Skills Cognitive and Affective Processes

<i>In-Class Exercises</i>	
Resource	Competency Dimension
<p>Case Vignette: Community Center</p> <p>This is a case study that addresses the role of an organization to address community needs.</p> <p>See Appendix 8A.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p>
<p>Policy Impact</p> <p>Students research an existing or proposed policy, analyze its likely impact on access to services, and present arguments to support or oppose it.</p> <p>See Appendix 8B.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p>
<p>Using Social Media</p> <p>Students practice using social media to communicate information about one of the Grand Challenge issues.</p> <p>See Appendix 8C.</p>	<p>Knowledge</p> <p>Skills</p>
<p>Mock Legislative Hearing</p> <p>This simulation requires students to develop arguments and testify on a bill provided by the instructor.</p> <p>See Appendix 8D.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>You've Won! Now What?</p> <p>This exercise requires students to think about policy implementation.</p> <p>See Appendix 8E.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p>
<p>Strategy Chart Case Study</p> <p>Students plan a detailed advocacy strategy, based on the material presented in a case study.</p> <p>See Appendix 8F.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p>

Assignments	
Resource	Competency Dimension
<p>Community Partner Project, Development of a Memorandum of Understanding for a Community Project</p> <p>The purpose of the projects is to provide an opportunity for students to work collaboratively with local organizations on community projects that facilitate and build the skills of the students and at the same time provide support for projects that are important to local organizations. Community partners receive requests for proposals (RFPs) to respond and are then selected to work with student groups from class. Students develop MOUs with community partners to define work on the project.</p> <p>See Appendix 8G.</p>	Knowledge Values Skills
<p>Developing a Policy Proposal</p> <p>In this assignment, students read a book that depicts a social problem, identify and critique possible policy solutions, and develop a policy proposal.</p> <p>See Appendix 8I.</p>	Knowledge Values Skills Cognitive and Affective Processes
<p>Policy Critique</p> <p>This multipart assignment requires students to analyze a proposed piece of legislation, first in written form and then as a podcast policy briefing.</p> <p>See Appendix 8J.</p>	Knowledge Values Skills
<p>Systems Problem Analysis and Practice Intervention</p> <p>This assignment provides students with analytic skills necessary to identify, assess, improve, and evaluate systemic problems.</p> <p>See Appendix 8H.</p>	Knowledge Values Skills
<p>Designing an Advocacy Campaign for Social Change</p> <p>This is a two-part group assignment in which students design a policy advocacy campaign using social media and emerging technologies.</p> <p>See Appendix 8K.</p>	Knowledge Values Skills Cognitive and Affective Processes
<p>Legislative Testimony</p> <p>This assignment requires students to craft and deliver a personal advocacy statement in the form of legislative testimony.</p> <p>See Appendix 8L.</p>	Knowledge Values Skills

(continued)

Assignments (continued)

Resource	Competency Dimension
<p>Advocacy Strategy and Implementation</p> <p>This is a comprehensive assignment that requires students to analyze a policy proposal, delineate a strategy, and develop and disseminate written advocacy tools.</p> <p>See Appendix 8M.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Advocacy Portfolio</p> <p>This is a semester-long team assignment in which students research a bill of their choice, provide an analysis, develop written advocacy tools, devise a strategy, engage in a lobbying visit, and reflect on their experience.</p> <p>See Appendix 8N.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

APPENDIX 8A: CASE VIGNETTE: COMMUNITY CENTER

As soon as Keith earned his master’s degree he decided to put all his time and energy into the creation of a center that would serve the youth of his community. Now in the fifth year of its existence, the center has grown from a storefront office, where Keith saw a few walk-in clients, into a major community center complete with recreational facilities, a peer counseling project, an ongoing consultation program, a busy staff of individual and group counselors, and a major role in the local youth advocacy movement. Most of the clients, counselors, and community members involved with the center are convinced that the explanation for this growth lies in the fact that the staff have always been close to the community’s young people and responsive to their needs. They feel that Keith, with the help of the energetic staff he has recruited, can realize a dream they all share, and they want his promise that he will stay with the center as director.

Keith is hesitant, for the agency no longer “runs itself” the way it used to. There is a need to departmentalize, to organize staff hiring and training, and to lay out appropriate plans for further change. Keith is afraid to place the

management of the center solely in the hands of a professional administrator because he fears that the community responsiveness that has been a hallmark of the program might be lost. He wants to continue to have an effect on the center's future, but he knows that he will have to learn how to plan, organize, and budget on a larger scale.

- 1) Describe the community career center's organization.
- 2) What theories guided the organization's growth?
- 3) Would you stay or leave the organization, and what is your rationale?

APPENDIX 8B: POLICY IMPACT

Instructor identifies state or federal policies (laws) or proposed policies (bills) that affect (or will affect) delivery of services to individuals or families.

- 1) In small groups, students spend 20 minutes researching on the Internet.
- 2) Each group will report back to the class how their group's assigned policy will affect individuals or families, whether in their lived experiences or their access to services.
- 3) Develop a set of arguments from the perspective of the affected groups to either support or prevent the passage of this legislation and identify the set of counterarguments you may face in your advocacy efforts.

APPENDIX 8C: USING SOCIAL MEDIA

Contributed by Renee Smith-Maddox

Select a Grand Challenge of Social Work (<http://aaswsw.org/grand-challenges-initiative/>) for students to work with to gain content knowledge and understanding of the social issue. Split the students into small groups (three or four people). Assign each group one of these four topics:

- 1) Facebook: Create a week's worth of ideas for Facebook posts on an issue of your choice, including topic, post type, tone, and timing.

- 2) Twitter: Create a week's worth of ideas for Twitter posts on an issue of your choice, including topic, post type, tone, and timing.
- 3) Blogging: Create a week's worth of ideas for blogging.
- 4) NASW or CSWE process: Create the guidelines that NASW or CSWE might need to implement a social media strategy (e.g., a workflow, approval process, comments policy, color schemes, logo).

When time is up, have students from each group share the outcomes of their discussion with the entire class.

APPENDIX 8D: MOCK LEGISLATIVE HEARING

The instructor identifies a bill for the class to focus on and provides a summary and fact sheet.

- 1) Students form small groups and familiarize themselves with the material.
- 2) Each group then draws, from a hat, the name of a person or organization (an "identity") that might support or oppose the bill. For example, if the bill would require that the U.S. government provide a lawyer to unaccompanied minors facing deportation, the possible identities might include an unaccompanied minor, a representative of NASW, a representative of Lutheran Immigration & Refugee Services, and the governor of Texas.
- 3) The group can research that identity in class (if time permits), or the instructor can provide a summary of possible arguments that person or organization might make.
- 4) Each group puts together 5 minutes of oral testimony, from the vantage point of their selected identity.
- 5) One volunteer from each group then presents the testimony, with classmates role playing a legislative committee (listening to and questioning each witness). Students must make their arguments as convincingly as possible, in character, adhering to proper protocol and format.

APPENDIX 8E: YOU'VE WON! NOW WHAT?

Contributed by Robert Vernon

Your bill passed into law. You and your colleagues are members of a coalition that is deeply concerned with the effects this new law will have on consumers and workers. You are meeting together to create a strategy for influencing how the bill will be interpreted, administered, funded, and enforced.

- Location: Which agency should have the direct responsibility for implementing this law?
- Rules and regulations: What are the most important rules and regulations that need to be considered as this legislation is implemented?
- Opportunities: What opportunities will this legislation provide?
- Problem areas: What specific problems may arise during the implementation of this legislation?
- Budget allocations: What sources for information are needed to determine how much is “probably enough” to really make this legislation work?

APPENDIX 8F: STRATEGY CHART CASE STUDY

Students will be provided instructions on the use of a strategy chart, initially developed by the Midwest Academy and modified by Northeast Action: <https://sites.google.com/daemen.edu/strategy-chart/home>

With their instructor, students will generate an advocacy-oriented mobilization strategy based on the following case. Each student is expected to contribute to the class discussion.

Students will be graded on their participation in drafting the strategy chart and completing the written chart.

The Organization

Success by 6 (SB6), a community coalition supported by the local United Way, started more than 12 years ago. In that time, the initiative has been successful

in securing support from the Department of Social Services to fund programming offering professional development training for child care workers working with young children and support for capacity building in child care settings. The initiative provides very limited phone line support to parents and child care workers who are facing challenges working with young children. The group also launched a fairly successful marketing campaign a few years back to demonstrate the value of high-quality child care for the community.

SB6 has one staff person dedicated to it, and she provides about half of her time to the coalition. Coalition staff has access to a computer, photocopying equipment, scanner, fax, and meeting rooms. Staff also has access to United Way's database, which includes information on more than 400 nonprofit organizations and 2,100 local businesses and corporations. There are currently 12 active members of SB6, and there were 40 people at their last meeting. The coalition's steering committee is made up of 6 core leaders, all of whom have been involved since the beginning. One of the steering committee members is very active with parent groups. She has a mailing list of more than 1,000 parents who have signed petitions or written a letter to their legislator in the past year.

Over the past several months, funding for core SB6 activities has come into question, and the group has decided that they must begin to move in new directions to address pressing community needs, including advocacy. At a recent meeting, SB6 decided that it also wanted to expand its active membership to 75 and to involve at least 300 people in its advocacy efforts to demonstrate some real organizational strength. This would include parents, early childhood experts, child care workers, interested community groups and leaders, and businesses, ideally.

A Community Problem

Parents and professionals from the child care and health and human service fields report increased problem behaviors among young children in general, including physical behaviors (e.g., hitting or punching, kicking, biting), difficulties with self-regulation (e.g., inability to pay attention or follow directions), problems with communication (e.g., screaming to get attention, acting out, engaging in attention-seeking behavior), and peer-related problems (e.g.,

not getting along with other students, increased isolation from peers). These behaviors may indicate socioemotional, intellectual, or other developmental challenges and the possible need for early intervention services.

Left unaddressed, behavioral, socioemotional, intellectual, and developmental challenges can pose major barriers to early educational activities (including preschool and kindergarten). A recent report on school suspensions in the Buffalo Public Schools noted 35 suspensions at the preschool level and 200 suspensions at the kindergarten level during a recent school year. Furthermore, educators indicate that it is difficult to address the learning needs of all students when as many as 15% of students in a given class are challenged. Unfortunately, the people who most commonly come into contact with young children are often not specifically trained to assess child behavior and development or to screen for underlying problems.

Communities across the nation have implemented universal screening programs in an effort to detect developmental challenges in young children. Unfortunately, New York State does not currently support such efforts financially or otherwise. There are concerns about the expense of such an undertaking. In addition, early intervention providers are not allowed to advertise their services to the public under current regulations. As a result, parents and child care workers who identify possible problems may not know where to turn for assistance or may face real difficulties navigating the system.

SB6 has decided to focus its energies on addressing this problem with an overarching goal of making screening for developmental challenges universally available. The coalition also wants to ensure that people are aware of available early intervention services and can access them as needed by changing current regulations about marketing programs.

Using the information provided in this case and in class, develop a strategy chart for SB6 with at least one short-, intermediate-, and long-term goal.

Appendix 8G: Community Project

Use this information to assist you in selecting a community organizing project and forming a group of three to five students to work on the project.

Purpose and Criteria for Proposals

The purpose of the projects is to provide an opportunity for students to work collaboratively with local organizations on community projects that facilitate and build the skills of the students and provide support for projects that are important to local organizations. The following are the criteria for the projects:

- The proposed projects should address a problem that local organizations are working on that uses or focuses on one or more of the following approaches:
 - *Community development*: place-based projects focused in specific neighborhoods related to a range of issues including youth, safety, housing, gentrification, and the arts.
 - *Community planning*: government, neighborhood, or other types of urban or community planning projects.
 - *Community organizing*: grassroots organizing projects focused on neighborhood organizing, social action, or policy and advocacy efforts, such as community mobilization, direct action, union organizing, and issue-based organizing around environmental issues, food security, immigration, human rights, fair wages, and the like.
- The proposed projects should help build students' knowledge and skills in community organizing, planning, or development (e.g., community analysis, planning, engagement, development, advocacy, mobilization and related skills in communication, marketing, social media, fundraising, evaluation).
- The students should be able to start and complete the project in one semester; however, the project may be part of a larger initiative the organization is working on.
- The organization proposing the project will work with students to develop and sign an MOU that describes the organization's and the students' responsibilities towards completing the project. As part of this MOU, a staff member from each organization would be assigned to work directly with students on the proposed project.

Questions to Consider in Reviewing the Proposals

- 1) Is the proposal clear and easily understandable?
- 2) Are the objectives clear? Is the approach clear?
- 3) Is the project part of a larger effort or longer-term goals that the organization would like to accomplish?
- 4) Does the agency or organization have sufficient infrastructure to support the proposed project (e.g., to communicate with students, provide assistance and guidance)?
- 5) Is the project mutually beneficial to you as a student and the local organization?
- 6) Does the project provide an opportunity to develop skills while providing additional capacity to the organization to accomplish its goals?
- 7) Are the required skills ones I want to develop or work on?
- 8) Are the agencies and organizations I will work with ones I want to develop networks with?
- 9) Is there a sufficient division of labor and expertise in my group to complete the project?
- 10) Does the described project seem feasible to accomplish in this semester?
- 11) Does there seem to be a good fit between the project, the local organization, and my group?
- 12) Would I enjoy reviewing and writing a summary of the literature on this topic?

Criteria to Consider in Forming Your Group

- 1) Diversity issues (group composition reflects the diversity of this class). Diversity includes advanced standing and 2-year students, as well as different interests and backgrounds.

- 2) Is there a shared interest in the overall topic? Although this is an ideal goal, with only a limited number of projects this will not always be attainable.
- 3) Is there a sufficient division of labor among group members' expertise to have group members complement each other? (Roles may include writer, organizer, technology expert, outcome leader, process leader, data analysis, previous experience dealing with a specific population, neighborhood or issue.)

Useful Things to Consider in Forming Your Group

- 1) Approach your group as a professional, task-oriented group.
- 2) It is highly unlikely everyone in the group will have the same interest in the project topic.
- 3) Your group should have a goal of everyone contributing equal time and effort to the project.
- 4) Look for fellow students with different skills to contribute to the project.
- 5) Discuss the protocol for group leadership, roles, and tasks (e.g., will the same people hold the same role for the entire project, or will roles rotate?). (Note: Each student will spend approximately 20–22 hours total on the project, including writing papers, working on the project tasks, etc.)
- 6) Discuss how your group will make decisions, and establish ways to deal with group conflict.
- 7) Be willing to compromise, relax, and have fun. This is a time-limited learning experience, not a lifelong commitment.

Suggestions for Initial Discussions With Community Project Organizations

- 1) Begin with introductions.
- 2) Community organization reviews project proposal, including the short- and long-term goals, how the project fits with their mission, what they

would like you to work on, and what they will do to support the project. Ask questions to get clarity on the project.

- 3) Students should review with the community organization their availability to work on the project and the availability of the person who will supervise the project.
- 4) Days of week or evenings you will be most available and what special time requirements the project might have.
- 5) Discuss the timeline for the project and the assignments you must complete for the project.
- 6) Discuss the proposal for project with the community organization, including the following:
 - Discuss the organization's ideas for the literature review, including what would be most helpful to the agency and to inform the project.
 - Discuss issues that might come up (e.g., confidentiality, entry into the community, permission to photograph) and how these will be addressed.
 - Discuss deliverables for the project (i.e., what would they like to see as the result of your efforts?). This may include materials that you produce or something else related to the project.
 - Address other issues, questions, and concerns.

Community Project RFP (application sent in advance to community groups and partners)

Name of Sponsoring Organization:

Address: _____

Phone: _____ Fax: _____

Name and Title of Contact Person:

Phone: _____ Fax: _____

Name and title of person who will oversee the project (if different from contact person):

Phone: _____ Fax: _____

Organizational website:

Brief description of organization:

Please indicate the primary type of project you are proposing:

- Community development
- Community planning
- Community organizing

Description of proposed project (maximum 350 words):

What skills are needed or would be developed by students if they worked on this project?

What roles will the students play in the project?

What roles will your organization play in the project?

What other community organizations would be involved with this project and how?

**APPENDIX 8H:
SYSTEMS PROBLEM ANALYSIS AND PRACTICE INTERVENTION**

A. Common Assignment: Systems Analysis and Methodology Paper

Rationale: Social workers practice in organizations and contexts that are part of larger social and community systems. Systems often deteriorate or break down as a result of normal or unanticipated stressors that affect one or more parts of the system. When systems are not working as intended, it disrupts the effectiveness and efficiency of how clients and stakeholders receive services or have needs met. This assignment provides students with analytic skills necessary to identify, assess, improve, and evaluate systemic problems.

Instructions

Methodology Paper

- Identify a situation, issue, project, or problem you have faced in a previous field placement, volunteer experience, or community context.
- Assess the issue further by conducting two stakeholder interviews, through ethnography, or by attending a community meeting or forum related to the issue. You should create a semistructured protocol for interview questions and take down detailed notes for events and ethnography or interviews. Attach the interview questions and each set of notes as appendices at the end of your report. Remember that regardless of your assessment method, you are trying to attain a better understanding of the presenting problem within the relevant community or social system.
- Apply the critical systems heuristics to the situation, addressing each of the 12 points in both modes (*is* and *ought*) and considering your assessment data and personal observations during the analysis.
- Based on the results of this analysis, choose a method you have learned or with which you would like to become more familiar to analyze the problem.
- Discuss why the method you chose is appropriate for addressing the problem and discuss the theoretical orientation of the method and congruence of the method with your professional philosophy.
- The methodology paper should be approximately 4–5 pages long. Where needed (and sparingly), use the footnote function in MS Word and input the references in the footnote in APA format. No other aspects of the APA style guide will be used except for APA standards for culturally sensitive and person-first language. Instead, you are expected to prepare all assignments as “professional reports” (e.g., single-spaced, with generous use of headings and subheadings, a non-Times New Roman font, underlining, italics, bold). In no way

should any reference to this course or the instructor appear on your report. The report is being prepared for the director, board of directors, or community group to whom you will be reporting. Finally, write the report in the third person instead of the first person. For example, instead of saying, "I will describe ..." try, "This report will describe...."

B. Common Assignment: Systems Intervention Practice Paper

Based on your practice philosophy and your methodological approach (which includes the boundary critique), develop a model of the intervention you would like to pursue to address the situation, issue, project, or problem identified in Assignment A. The modeling approach can be the viable system model, a soft systems model, or another conceptual modeling approach of your choice covered in the class.

This part of your report should focus on the aspects of your boundary critique that you found most problematic in the "Is" mode. Only 1–2 pages should be spent on this discussion. Most of your report (3–4 pages) should focus on a possible solution based on ideas you initially identified in the "Ought" mode of your boundary critique and expanded based on your use of the soft systems model, interactive planning, and so on. Lastly, develop a logic model and brief evaluation plan (1–2 pages) for determining the effectiveness of your proposed systems change plan.

One aspect of this paper will be a Rich Picture or conceptual map. These rich pictures or diagrams will be presented over the last 3 weeks of the course. The purpose of these presentations is to inform your fellow students about the situation, issue, project, or problem and to receive feedback on additional issues you may want to consider.

As with all professional reports, include a descriptive title with an introductory and concluding or summary paragraph.

APPENDIX 8: DEVELOPING A POLICY PROPOSAL

Part I

Have the entire class read one of the following books or permit groups of students to choose. Each describes a social problem.

Alexander, M. (2012). *The new Jim Crow: Mass incarceration in the age of colorblindness*. New York, NY: The New Press.

Dorris, M. (1989). *The broken cord*. New York, NY: Harper Collins.

Klineberg, E. (2002). *Heat wave*. Chicago, IL: University of Chicago Press.

Kozol, J. (1991). *Savage inequalities: Children in America's schools*. New York, NY: Random House.

Part II

In teams (based on book chosen), students will do the following:

- 1) Research and describe the social problem identified in the book (e.g., nature, scope, size, distribution, trends, populations affected, theories of causation, contributing factors, significance, solutions attempted).
- 2) Update the book's statistical information to account for the time that has elapsed since publication. Explain any inconsistencies in the data. Properly reference all information.
- 3) Articulate a goal suggested by the topic (e.g., reduce racial disparities in the criminal justice system). Develop an outcome objective that relates to that goal.
- 4) Brainstorm as many policy ideas as possible that would help you achieve your objective.
- 5) Develop a list of possible evaluation criteria for choosing between policy options (one must be consistency with social work values). Rank your options according to which you think are most meaningful.
- 6) Apply the top-ranked criteria to your list of policy options. Describe how each fares. Identify the single best policy option and explain your rationale.

The group's work should be dated and recorded. Although students will deliberate in teams, each individual student must record the team's thinking and conclusions.

Part III

Once students have received feedback from the instructor, each student (individually) should proceed with Parts III and IV.

Elaborate on your policy proposal by further describing how it would be operationalized:

- Who would be eligible?
- Would your eligibility rules be selective? Universal? Means tested? Who are the intended beneficiaries? The unintended beneficiaries?
- What would those who are eligible receive? Intangible or concrete benefits? Limited scope or diversified? Cash? In-kind? Vouchers?
- Where and by whom would services be delivered?
- Would they be centralized or decentralized? Professional providers, paraprofessionals, or lay?
- How would the program or service be financed? Categorical or block grants? Entitlements or discretionary funds? Federal, state or local? Voluntary contributions, general revenues, fee for service, sliding-fee scale, matching funds, dedicated tax, prior contribution, private contract?

Part IV

In each case, explain why you made the choices you did. Relevant concepts might include (see Chambers & Bonk, 2013) consumer sovereignty, stigma, efficiency, values, cost, accessibility, prevention versus cure, off-targeting, seepage, waste, incentives, disincentives, stability, vertical versus horizontal equity, consistency, choice, flexibility, quality, accountability, control, trust, alienation, and unintended consequences.

APPENDIX 8J: POLICY CRITIQUE

Contributed by Stacey R. Kolomer

Part I: Paper

Each class member will prepare a policy critique paper (8–10 pages.) pertaining to a piece of legislation being proposed in the current state or federal legislative session. In addition, each student will send an e-mail to his or her representative about the issue advocating for or against the legislation. A copy of the e-mail must be submitted with the paper.

The paper should be a maximum of 8 pages in length, double-spaced, excluding title and reference pages. The paper should be prepared in accordance with APA guidelines for manuscripts, with attention being given to in-text citations and references. The paper should use at least six scholarly sources. Additional nonscholarly sources may be included. Please proofread your paper for grammatical errors and submit to the online Policy Critique submission link on blackboard.

Introduction: Overview of Legislation

- statement of the problem, concerns, or demands; issue the legislation addresses; and the related historical and political background;
- magnitude and scope of the problem; basic facts describing the problem or issue that the legislation addresses;
- statement of the legislation proposed and how it relates to the problem.

Comprehensive Description of Legislation: Purpose and Goal of Legislation

- representatives sponsoring the legislation and its focus;
- how the legislation is intended to work;
- the resources or opportunities the legislation is expected to provide;
- who will be covered by the legislation and how the legislation will be implemented.

Stakeholders and Decision Makers: The Agenda of the Legislation

- the individuals, groups, or organizations that are concerned with the issues related to the legislation;
- the positions of the stakeholders (individual, group, organizations), the ideologies and values that support their positions, and whether the values or positions conflict;
- the knowledge base or scientific grounding, if any, on which the legislation rests and any provisions for determining the effectiveness of the legislation.

Framework or Model of Analysis: Method to Analyze Legislation

- statement of framework or model of analysis and explanation of why it is applicable (why your framework or model, was chosen);
- analysis of the legislation or policies through the framework or model chosen;
- anticipated and unanticipated consequences of the legislation in creating new or changing existing policies;
- who gains who loses with the legislation and related policies, and who might or might not benefit from the legislation and related policies;
- critical points of disagreement between supporters and opponents of the legislation and related policies.

Conclusion: Critical Assessment of Legislation

- your assessment of the legislation and related policies;
- recommendations for change and any predictions, good or bad;
- implications for social work practice.

Part II: Policy Podcast

Each student will prepare a policy briefing podcast or audio recording (5 minutes) on the policy analysis of the legislation reviewed in Part I. The podcast will be persuasively stated to advocate for or against the legislation. All briefings must be posted to blackboard. Students will be separated into discussion board groups of five or six members each. Students will listen to the recordings of all members in their group and must ask one question of each group member about their briefing on the group's discussion board within 1 week after the first recordings were posted. All questions must be answered within 2 weeks after the first recordings were posted.

APPENDIX 8K: DESIGNING AN ADVOCACY CAMPAIGN FOR SOCIAL CHANGE

Guiding question: What are some ways that social service organizations or agencies, grassroots efforts, and advocacy groups can use social media to transform their work?

Policy Advocacy Campaign and Team Presentation

This assignment is designed to address a specific policy issue relating to a Grand Challenge of Social Work (<http://aaswsw.org/grand-challenges-initiative/>) on which to take some action (create, revise, or eliminate). Groups will be asked to design a policy advocacy campaign using social media or emerging technologies (e.g., information technology, wireless data communication) to influence opinions and the formation of public policy, raise awareness of the issue, and directly engage policy influencers (e.g., policymakers, professional organizations, lobbyists, bloggers, online organizers) or mobilize grassroots action.

Product 1: Presentation

Work groups are required to give a 15- to 20-minute presentation. Here are the requirements:

- Provide an overview of the social issue and the related policy.
- Identify your target policy-making audience (whom are you trying to influence?).

- Identify your target activist audience (whom are you mobilizing to take action?).
- Provide details on what you are asking your audience to do and exactly how you will get them to do it (How will you pitch the social action agenda? What actions do you want them to take?).
- Create and present a mockup of a website, text for e-mail messages, #hashtags, blogs, tweets, and Facebook posts. A YouTube video can also be part of the advocacy campaign.
- Identify your metrics for success (What will you measure? What does success look like? How will you measure impact).
- Include a budget and timeline for launching and implementing the advocacy campaign.

Product 2: 3-Minute Policy Advocacy Video

After the advocacy campaign has been designed (and ideally implemented and evaluated), each team creates a video presenting the solution to the world. This video includes:

- information about the group;
- a statement of the Grand Challenge selected and why this challenge is important in the specific context;
- how the advocacy campaign can be implemented;
- how success will be measured.

Students should be collecting video, audio, and images throughout the learning experience to be used in the 3-minute policy advocacy video.

APPENDIX 8L: LEGISLATIVE TESTIMONY

Contributed by Elspeth Slayter

This assignment is about connecting your life as a social worker--and the observed lives of your clients--to the world of social policy. In this assignment

you will craft testimony, or in more simple terms, a personal advocacy statement that relates to a proposed piece of legislation or alternative specific policy issue. The idea behind this assignment is to help you to build confidence in speaking truth to power.

Testimony

You will be giving your testimony as an oral presentation in videotaped format. Do not read your notes; use talking points. You will have 5 minutes to present your formal testimony. Your testimony should include both personal anecdotes (which would ideally include anecdotes related to unnamed clients) and data or evidence in support of your position in the form of a dossier.

Outline for Presentation of your Oral Testimony

- Thank the committee for allowing you to testify. If your representative or senator is a member of the committee, acknowledge that person and note that you are his or her constituent.
- Identify who you are and state your personal familiarity with or interest in the issue (bill) at hand. If you have worked with the population who will be affected by the proposed legislation, if you have worked (or interned) in an agency that provides services to the population, or if you have personal experience (family, friends, or yourself) with the issue at hand, say so and provide details.
- State whether you support, oppose, or want to offer suggestions to improve the proposed legislation (or regulation) and why.
- Provide a succinct analysis of the problem being addressed by the legislation (or regulation change), using stories and some documentation (e.g., data from peer-reviewed journal articles or reputable think tank reports) to support your analysis (statistics related to the problem are quite appropriately included here). If you have information about how similar legislation has worked in another state (and you should research this), include it; likewise, you can draw on information you've obtained from an advocacy group. Anecdotes are useful here, even though they're not appropriate in formal research papers.

- State your support, opposition, or suggested amendments to the bill and explain your position in clear and concise language. Projecting likely impacts on the subject population as a result of the proposed bill (or regulation change) is a good technique and can be used for whatever stance you take.
- Thank the committee again.

Written Dossier

You will also prepare supporting documents to go along with your videotaped presentation, as follows:

- Cover letter: This should contain your name, your home address, your work (or field agency if appropriate), and contact information (phone number, e-mail address). This letter should also state which proposed legislation (or alternative) you are addressing, explain your stance on the proposed legislation (or alternative), and explain what is in the packet attached to the letter.
- Talking points: Create a summary sheet to make your main points during your testimony. This should consist of ordered phrases, enough for you to glance at during testimony, as a guide.
- Memorandum: This will be a 5-page, double-spaced memorandum to the appropriate authorities (to be discussed individually) regarding your position and a summary of the personal and research evidence in support of your stance. You should cite research evidence using APA style and reference that evidence as an appendix or multiple appendices.
- Appendices: Provide a reference list of key documentation (e.g., reports, articles, graphs, tables of data, quotes from constituents) with a sentence by each one explaining why they are important.

Peer Review

After you have submitted your legislative testimony, you will conduct two peer reviews of student videos. Comment on how well the student responded

to the assignment instructions, on areas they might improve, and on their presentation skills regarding making a clear and engaging presentation.

APPENDIX 8M: ADVOCACY STRATEGY AND IMPLEMENTATION

An important skill for professional social workers is the ability to engage in policy advocacy. Over the course of the semester, each student is expected to develop and implement an advocacy project around a policy issue of professional or personal interest. The advocacy may be on a local, state, or national level. Students are encouraged to complete this project in a two-person team; however, individual projects are permitted.

You are expected to identify a domestic policy issue at the local, state, or national level and develop and implement an advocacy strategy to strengthen policy in this area. This assignment focuses on your plan for bringing about policy change related to this issue.

Proposed Advocacy Strategy Summary

Write a 3- to 4-page narrative that plans your proposed advocacy effort, addressing each of the following points:

- Using references, identify and describe briefly the broad policy problem you will be addressing in this project and why there is a need for change regarding this problem.
- Make a clear statement of the specific policy change you seek and how this change will affect practice, clients' lives, and social, environmental, or economic justice.
- Justify the specific long-term, intermediate, and short-term goals you hope to achieve through your advocacy.
- Specify (including names, titles) the targets with authority over the issue that you seek to influence. Discuss the targets' political party affiliation, reputation and voting record in areas related to your policy problem, and any other information about your target relevant to your advocacy goals. Explain why these people are the appropriate targets of your advocacy effort.

- Using course readings or other references, describe and justify each advocacy approach and tactic you will be using.
- Based on the tactics you have selected, identify and describe three advocacy tools you would like to implement this semester. Explain why you are choosing each of these tools for this advocacy effort.

Advocacy tool share

For each advocacy tactic you select, you will develop at least one advocacy tool from the following list, for a total of three distinct tools:

- talking points to be used in advocating your position;
- fact sheet for a lawmaker;
- op-ed;
- testimony for an elected or appointed body;
- letter to the editor;
- letter to local, state, or national legislator;
- press release;
- radio or TV spot;
- website, if accompanied by dissemination plan;
- development and strategic dissemination of infographics;
- social media tools, if accompanied by a structured media plan;
- phone banking guide (in-person or virtual);
- coordination plan for a lobby day;
- other advocacy tools, with approval by course professor.

Between Sessions 8 and 12, each student is required to present a solid draft of at least one of the three advocacy tools to fellow students to receive constructive feedback from peers.

Final Advocacy Strategy

At the end of the semester, students are required to revise their strategy, incorporating the professor's feedback. This revision must reflect *all* changes in the plan and its implementation since the proposal was submitted.

Regardless of whether students work individually or in pairs, each individual student must add the following to the end of the strategy summary document:

- Describe and discuss any outputs (e.g., number of letters to the editor submitted, number of phone calls made, number of social media followers added, number of website hits) and any outcomes (e.g., responses from your targets, media coverage, progress toward or achievement of any of your goals) of your advocacy effort.
- Provide a multiparagraph personal reflection of your experience with the project, including an analysis of your own competencies regarding policy advocacy.

Final Project Implementation: Advocacy Tools and Project Log

Students are expected to develop and submit to the professor three distinct tools necessary for implementing the advocacy project. At least two of these tools must be implemented through publication submission, presentation, or dissemination to lawmakers or the public. A log that provides evidence of implementation of each tool, along with the date you implemented each tool, the location, and any key stakeholders that were present, must be submitted. Up to 1 extra credit point will be awarded per additional tool submitted for publication, presented, or publicly disseminated.

APPENDIX 8N: ADVOCACY PORTFOLIO

Students will form teams of three or four members each. Each team will research a bill currently pending before the U.S. Congress or the state legislature, analyze the bill and attendant landscape, articulate a comprehensive lobbying strategy, engage in legislative advocacy consistent with social work values, and prepare professional-quality materials to support a successful lobbying effort.

The team's work will be represented by a written portfolio. Except for Part II-B (which is completed individually), all team members will receive a single grade based on the quality of the final product.

Part I

A. Background

- Description of the underlying problem: Legislation is typically introduced to address a perceived problem. What problem is your bill attempting to address? Provide background and statistical information that elucidates the causes, scope, dynamics, and trends relevant to the underlying problem, as well as who is affected by the problem and how.
- Summary and status of the bill: Read the bill and summarize its major provisions in your own words. What would the bill do? How would it change current policy? What is its status? (Which committee has jurisdiction? Have there been any hearings? A markup? Any important votes?). If there are bills in both houses, how do they differ? What is the status of each? Has this, or a similar bill, been introduced before? If so, how far did it get toward enactment?
- Analysis of the playing field (proponents and opponents): Who are the major supporters (or likely supporters) of the bill? Who are its opponents? Consider both those inside the legislature (sponsor, cosponsors, others) and those on the outside (advocacy and professional organizations). Explain what role each plays and how critical their support or opposition is likely to be. Finally, what factors in the larger environment might predispose the bill toward success? Toward failure?
- Arguments pro and con: Provide a well-documented and articulate list of arguments in favor of the bill, followed by a list of arguments against the bill. Make the strongest case you can both for it and against it. Be sure to cite any sources you are relying on.

- Team's recommendation (support, oppose, amend) and rationale: After considering what you now know about the bill and considering any position that NASW has taken on it, your team should reach a conclusion about what your position will be: Help to get the bill passed, try to get the bill killed, or work toward the passage of an amendment. Explain your conclusion and rationale.

B. Written Instruments

Draft the following communication tools. For each one, identify your intended audience and what you hope to achieve. Each should come from your team (give yourselves an identity!) and should reflect the reality of your bill's status at the time it is written, reflecting strategic thinking.

- Fact sheet or position paper: Prepare a 1-page (one- or two-sided) document that could be used as a lobbying tool. Who would your audience be? What is your objective? What deliberate choices did you make in terms of tone, format, and content?
- Letter to a legislator: Draft a letter to a legislator, advancing your position on the bill. Whom would you send it to? Why? What is your objective in sending it? What deliberate choices did you make in terms of tone, format, and content, given this audience?
- Media or social media: As part of your outreach, draft a letter to the editor or an op-ed piece. Where would you submit it? Why? Be sure it conforms to the specifications acceptable for that specific news outlet. What deliberate choices did you make in terms of tone, format, and content, given your likely audience? Then create a Facebook page or Change.org petition advancing your position on the bill. Who is your audience? What is your objective? What deliberate choices did you make in terms of tone, format, and content, given your likely audience?

Part II

A. Strategy

If your team oversaw developing an overall legislative strategy for your bill, what would it look like? Examine each of the following elements, being as specific as you can. Use the following questions as your guide:

- Testifying: Would it be important to testify on this issue? Why or why not? If so, what would you hope to gain? Whom would you choose to deliver the testimony? Why? Whom would you be trying to influence? What would you seek to get across?
- Coalition building: Would it be important to work in coalition? Why or why not? Whom would you seek to partner with? Why? What would you have the coalition do?
- Face-to-face lobbying: How important would face-to-face lobbying be? Who should make these visits? Why? Whom would you target? Why? Which arguments would be most effective? How would you frame them? What kinds of written tools would be most helpful? What role, if any, do you see for clients or consumers in your lobbying effort? Explain.
- Field organizing: Is an active field presence important? Why or why not? If so, whom would you mobilize? How? With what message? What would you ask them to do?
- Media campaign: Would you use the media as part of your action campaign? Why or why not? What media resources would you use? What message would you seek to convey? Who would be your audience? How would you coordinate this effort with other parts of your legislative campaign?
- Finally, which of these activities do you see as the centerpiece of your legislative campaign? Why?

B. Lessons Learned (to be submitted individually)

Before completing and submitting Section B, each student must engage in face-to-face lobbying visits with at least two legislative offices, specifically on your chosen bill. You may do these visits together with other members of your team. Each visit should be scheduled in advance, and those making the visit should spend adequate time preparing. Every member of the team must be an active participant in the lobbying visits. In a cogent, thoughtful reflective statement, each student should respond to the following questions:

- Which legislators did you lobby? Why were they selected? For each meeting, whom did you meet with? Who else attended? What was your agenda? How did you prepare? What was the most important thing you succeeded in communicating? What was the most important thing that was communicated to you? What would you hope to do differently next time?
- In the process of completing this project, what did you learn about your topic? What did you learn about the legislative process? How did your experience compare to what you thought when you entered the class? How did your experiences compare to what you learned from readings, lectures, and other materials? What did you learn about yourself as an advocate? As a social worker?



Competency 9:

Evaluate Practice With Individuals, Families, Groups, Organizations, and Communities

SPECIALIZED MACRO PRACTICE COMPETENCY DESCRIPTION

Macro social workers use research methods to evaluate programs, interventions, organizations, communities, and policies by using multiple sources of knowledge including professional experience, practice knowledge, and stakeholder input. They consider research and theories on organizational, community, and political processes in addressing the causes and consequences of social problems, inequality, and systematic oppression. Macro social workers evaluate the processes and outcomes of change efforts to ensure that evaluation findings are used to promote social, political, and economic justice, sustainable and accessible services and programs, and evidence-based practice. Macro social workers ensure that evaluation design, measurement, implementation, and use of findings are customized to the target population and diverse settings and that they are culturally responsive, accurate, and timely. They recognize that evaluation is a complex activity that does not occur in a vacuum and that factors such as measurement issues, multiple goals, and changing systemic contexts contribute to success or failure. They strive to include the perspectives, input, and participation of stakeholders and community members throughout the evaluation process.

COMPETENCY BEHAVIORS

Social workers in macro practice

- select appropriate evaluative questions to facilitate documenting, improving, or changing organizational programs, policies, and community performance processes and outcomes;
- develop collaborative relationships with internal and external stakeholders to engage them in the evaluation process;
- integrate theoretical and conceptual frameworks into evaluation strategies that facilitate an understanding of community, organizational, and policy dynamics and outcomes;
- develop evaluation plans that include clear goals, outputs, and outcomes, and operationalize all aspects of a planned evaluation, including partners, measures, data collection, analysis, and dissemination;
- demonstrate the ability to use and apply quantitative and qualitative data analyses and current technological processes and resources, such as SPSS, geographic information systems, administrative data, and management information systems, to inform and enhance evaluation activities;
- use and translate evaluation outcomes to increase the effectiveness and sustainability of organizations and communities and to advocate for policies and planned change efforts that advance social work values;
- recognize and factor in the complexities of the work needed to receive institutional review board approval and the complexities associated with the power dynamics.

CURRICULAR RESOURCES MAPPED TO COMPETENCY DIMENSIONS

Readings

Resource	Competency Dimension
ARTICLES	
Bowen, S. (2008). Beyond self-assessment: Assessing organizational cultural responsiveness. <i>Journal of Cultural Diversity, 15</i> (1), 7–15.	Knowledge Values Skills
Caldwell, M., Ziemke, M., & Vitacco, M. (2008). An examination of the Sex Offender Registration and Notification Act as applied to juveniles: Evaluating the ability to predict sexual recidivism. <i>Psychology, Public Policy, and Law, 14</i> , 89–114	Knowledge Values Skills
Coffman, J., & Reed, E. (2009). Unique methods in advocacy evaluation. Harvard Family Research Project. Innovation Network. Retrieved from http://www.innonet.org/resources/files/Unique_Methods_Brief.pdf	Knowledge Skills
McNutt, J. G. (2011). Is social work advocacy worth the cost? Issues and barriers to an economic analysis of social work political practice. <i>Research on Social Work Practice, 21</i> (4), 397–403.	Knowledge Skills Cognitive and Affective Processes
Medina-Borja, A., & Triantis, K. (2014). Modeling social services performance: A four-stage DEA approach to evaluate fundraising efficiency, capacity building, service quality, and effectiveness in the nonprofit sector. <i>Annals of Operations Research, 221</i> , 285–307. doi:10.1007/s10479-011-0917-0	Knowledge Skills
Shapiro, V. B., Oesterle, S., Abbott, R. D., Arthur, M. W., & Hawkins, J. D. (2013). Measuring dimensions of coalition functioning for effective and participatory community practice. <i>Social Work Research, 37</i> (4), 349–359.	Knowledge Skills
Torres, R. (2016). Planning and facilitating working sessions with evaluation stakeholders. <i>New Directions for Evaluation, 149</i> , 53–66.	Knowledge Skills
Winter, C., & Ohmer, M. L. (2014). Using the best of research and practice to create an outcome measurement framework: A family service agency's experience. <i>Families in Society: The Journal of Contemporary Social Services, 95</i> (3), 155–162.	Knowledge Values Cognitive and Affective Processes

(continued)

Readings (continued)

Resource	Competency Dimension
BOOK CHAPTERS	
Hillier, A., & Culhane, D. (2012). GIS application and administrative data to support community change. In M. Weil, M. Reisch, & M. L. Ohmer (Eds.), <i>The handbook of community practice</i> (2nd ed., pp. 827-844). Thousand Oaks, CA: SAGE.	Knowledge Skills
Lane, S. R., & Pritzker, S. (2018). Evaluating political social work efforts. In <i>Political social work: Using power to create social change</i> (Chapter 13). New York, NY: Springer.	Knowledge Values Skills
BOOKS	
Patton, M. Q. (1997). <i>Utilization-focused evaluation</i> (3rd ed.). Thousand Oaks, CA: SAGE.	Knowledge Skills
Royse, D., Thyer, B. A., & Padgett, D. K. (2016). <i>Program evaluation: An introduction to an evidence-based approach</i> (6th ed.). Boston, MA: Cengage Learning.	Knowledge Values Skills

Media

Resource	Competency Dimension
Advocacy Capacity Tool, Boulder Advocacy Available at https://www.bolderadvocacy.org/tools-for-effective-advocacy/evaluating-advocacy/advocacy-capacity-tool	Knowledge Skills
Centers for Disease Control and Prevention (CDC) Evaluation Resources and Basic Evaluation Steps CDC Evaluation Working Group: http://www.cdc.gov/eval/index.htm CDC Program Evaluation Resources: http://www.cdc.gov/asthma/program_eval/default.htm Youth Program Evaluation Resources: https://www.cdc.gov/healthyyouth/evaluation/index.htm CDC Guide to Community Preventive Services: http://www.thecommunityguide.org/inde.html CDC: Free EZ-Text and AnSWER Qualitative Data Analysis Software: http://www.cdc.gov/hiv/topics/surveillance/resources/software/index.htm	

(continued)

Media (continued)

Resource	Competency Dimension
<p>Harvard Family Research: Advocacy Evaluation Guide</p> <p>Available at http://www.hfrp.org/evaluation/publications-resources/a-user-s-guide-to-advocacy-evaluation-planning</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p>
<p>National Neighborhood Indicators Project</p> <p>Available at: http://www.neighborhoodindicators.org/</p>	<p>Knowledge</p> <p>Skills</p>
<p>Online Resources for Describing Programs and Interventions</p> <p>Innovation Network Logic Model: http://www.innonet.org/</p> <p>Theory of Change: http://www.theoryofchange.org</p>	<p>Knowledge</p> <p>Skills</p>
<p>Outcome Indicators Project, The Urban Institute</p> <p>Provides a framework for tracking nonprofit performance. It suggests candidate outcomes and outcome indicators to assist nonprofit organizations that seek to develop new outcome monitoring processes or improve their existing systems. Available at https://www.urban.org</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>W. K. Kellogg Foundation</p> <p>W.K. Kellogg provides many publications and other resources to help organizations evaluate the effectiveness of their programs. Publications include an evaluation handbook and a logic model guide. Available at https://www.wkkf.org</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

In-Class Exercises

Resource	Competency Dimension
<p>Agency Perspectives on Evaluation</p> <p>Invite a panel of speakers who represent a variety of human service organizations to address the students. Prepare the speakers to provide the following information: mission, service delivery approach, key program initiatives, program evaluation methods, and agency decision-making processes for program sustainability. Have students discuss and compare their impressions after the panel presentation or at the next session.</p>	<p>Knowledge</p> <p>Values</p> <p>Cognitive and Affective Processes</p>

(continued)

In-Class Exercises (continued)

Resource	Competency Dimension
<p>Evaluating Policies</p> <p>Students evaluate an existing policy from different stakeholder perspectives.</p> <p>See Appendix 9A.</p>	<p>Knowledge</p> <p>Skills</p>
<p>Grant-Making and Evaluation</p> <p>Invite a grant officer from a local philanthropic foundation to visit the class. Prepare the presenter to address expectations they have of their grantees concerning organizational and community evaluation processes.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>
<p>Logic Models</p> <p>Using a real-life case study of a community-based organization, students are provided statements or words that are part of the organization’s logic model on colored sheets of paper. Students must work together and figure out how each of their statements fits under the logic model framework: resources, activities, outputs, and short-, medium-, and long-term outcomes.</p> <p>The following resource is provided for students to review as a reading they must complete before this class session:</p> <p>The Innovation Network. (2005). <i>Logic model workbook</i>. Washington, DC: Author.</p>	<p>Knowledge</p> <p>Skills</p>

Assignments

Resource	Competency Dimension
<p>Cultural Competence Evaluation</p> <p>Agencies often provide initial training to staff regarding cultural needs of the people they serve. As with any program, design and implementation are only a part of the process of good program management. For this assignment, you will use the cultural assessment model described by Bowen (2008) to evaluate the cultural competence of your practicum site. Use the following outline to prepare an 8- to 10-page evaluation report in which you identify areas of strength and weakness. The paper should conclude with an initial program recommendation to improve cultural competence.</p> <p>See Appendix 9E.</p>	<p>Knowledge</p> <p>Values</p> <p>Skills</p> <p>Cognitive and Affective Processes</p>

(continued)

Assignments (continued)

Resource	Competency Dimension
<p>Evaluation Project</p> <p>Each student is required to complete a program evaluation in the field agency or place of employment or with another student at the field agency or place of employment. Products include an evaluation timeline, proposal, paper, and presentation.</p> <p>See Appendix 9C.</p>	Knowledge Values Skills Cognitive and Affective Processes
<p>Online Analysis 1: Building Online Logic Models</p> <p>For this exercise, students work alone or in pairs to develop a logic model using the Innovation Network Logic Model Builder. The Logic Model Builder will allow you to create and edit the logic model online. Students use two real-life cases that are posted to the course website to develop their logic model.</p> <p>Online Analysis 2: Developing an Online Survey</p> <p>For this exercise, you will work alone or with the same partner you worked with to develop a logic model for Online Exercise 1. For this exercise, create an online survey to evaluate a program described in the case study. Use SurveyMonkey to create your online survey. Use the same case study you used for Online Exercise 1.</p> <p>See Appendix 9D.</p>	Knowledge Values Skills Cognitive and Affective Processes
<p>Policy Evaluation Assignment</p> <p>Select a policy that has been implemented in your community. Find the enabling legislation for the policy, implementing regulations for the policy, and a fiscal impact statement, if one was developed. Identify the organizations in your community that are implementing the policy.</p> <ul style="list-style-type: none"> ● Identify the theory of change for this policy. ● What questions would you formulate to set up an evaluation project to assess outputs, outcomes, and impact of this policy? ● What kind of data would you collect to gather evidence to assess policy outcomes and impact? ● What steps would you take to disseminate findings from this policy evaluation? 	Knowledge Values Skills Cognitive and Affective Processes

(continued)

Assignments (continued)

Resource	Competency Dimension
<p>Program Evaluation Grid Assignment</p> <p>Using the program assessment grid described in Kluger (2006) have students conduct an evaluation of programs provided by their agency. Then instruct students that the agency has experienced a 20% loss of funding. Using the results obtained through the program evaluation grid, have students discuss, in an 8- to 10-page paper, their recommendations for addressing the budget shortfall from a program effectiveness perspective.</p> <p>Kluger, M. P. (2006) The program evaluation grid. <i>Administration in Social Work, 30</i>(1), 33-44.</p> <p>https://www.tandfonline.com/doi/abs/10.1300/J147v30n01_03</p>	Knowledge Values Skills Cognitive and Affective Processes
<p>Social Mapping</p> <p>In this exercise you will learn to monitor households based on indicators that the community agrees on in a very participatory process.</p> <p>See Appendix 9F.</p>	Knowledge Values Skills Cognitive and Affective Processes
<p>Team Evaluation Project and Report</p> <p>Teams of four students partner with human service agencies on selected evaluation projects from a results-based accountability and empowerment evaluation perspective. Each team (1) selects appropriate evaluative questions with stakeholders that can lead to documenting, improving, or changing program or project performance, (2) collects and analyzes basic quantitative and qualitative data and interprets results, (3) succinctly and clearly presents findings to the organization or professional community, and (4) collaboratively discusses a course of action with stakeholders.</p> <p>See Appendix 9B.</p>	Knowledge Values Skills Cognitive and Affective Processes

Field Activities

Resource	Competency Dimension
<p>Evaluating Consumer Satisfaction</p> <p>Have students use an online survey instrument such as Google Forms or Survey Monkey to create a consumer satisfaction survey for their practicum agency with their knowledge and participation.</p>	Knowledge Skills

(continued)

Field Activities (continued)

Resource	Competency Dimension
<p>Use of Research and Data for Evaluation in Your Agency</p> <p>This assignment can be used as a written assignment, for discussion purposes, or as an online activity.</p> <p>Answer as many questions as possible as they relate to your current field placement setting or agency. Incorporate at least four relevant course readings into your answers.</p> <ul style="list-style-type: none"> • What are ways in which your agency uses data for planning and evaluating its services, strategies, and programs? What tools and tactics, if any, are used to incorporate data or research into planning and evaluation activities (e.g., logic models, strategic plans or action plans, community mapping, community visioning, surveys, tracking, interviews, focus groups, or other participatory methods)? • What role do staff, managers, board members, volunteers, and clients or constituencies have in the planning and evaluation process? How does your agency obtain feedback from these groups to know whether the programs and strategies are working (<i>i.e.</i>, are they effective, and by whose criteria)? • Are evaluation results used, and by whom? How are they used? If not, how could they be used? Using the Participatory Action Research (PAR) Toolkit (www.researchfororganizing.org), suggest one or two PAR evaluation tools that your agency could use to generate data that could be used to assist the agency in achieving its desired outcomes. 	<p>Knowledge</p> <p>Values</p> <p>Skills</p>

APPENDIX 9A: EVALUATING POLICIES

- 1) Identify and briefly describe an existing social policy: Divide into three groups, each representing a different local stakeholder organization that has been asked by a local (or state, or federal) legislator to evaluate the policy so that he or she can decide whether to continue to support it.
- 2) Three stakeholders: The stakeholders should include a community-based advocacy group, a local business organization, and a human service organization.
- 3) Task for each group: What will you have to consider in deciding how best to evaluate this policy? What criteria will you use and why? What method of evaluation? What measures? What benchmarks? On what basis will you decide whether the legislator should support or oppose the policy? Provide your rationale.

- 4) Final task: The three groups meet to share their results, compare decisions, and see whether they agree on a shared recommendation. If the policy must be tweaked to bring all parties on board, indicate what needs to be tweaked and why the changes create grounds for reconciling differences.

APPENDIX 9B: TEAM EVALUATION PROJECT AND REPORT

Teams of four students partner with human service agencies on selected evaluation projects from a results-based accountability and empowerment evaluation perspective. Each team (1) selects appropriate evaluative questions with stakeholders that can lead to documenting, improving, or changing program or project performance, (2) collects and analyzes basic quantitative and qualitative data and interprets results, (3) succinctly and clearly presents findings to the organization or professional community, and (4) collaboratively discusses a course of action with stakeholders.

- 1) Executive summary
- 2) One-page summary of your focus area, key questions, measures, methods, major findings, and implications, key lessons, and recommendations
- 3) Context and methods
- 4) Environmental context (agency or community) and focus of project
- 5) Summary of relevant and related literature
 - a. Indicators and measures for designated focus
 - b. Methods for data collection
- 6) Results
 - a. What story does the data tell? Describe the major themes related to your focus area.
 - b. Are there differences in the data results by demographic characteristics?
 - c. What key questions can you answer (what's so and so what)? How much? How well? Anyone better off, difference made?

- 7) Implications and recommendations
 - a. What could be done better?
 - b. What key lessons learned or suggestions could help in future initiatives?
 - c. Partners who might have a role or could contribute?
 - d. No-cost or low-cost ideas and strategies?
- 8) Team learning: Describe what your team learned about evaluation from both the process and outcomes of the project.

APPENDIX 9C: EVALUATION PROJECT

Each student is required to complete a program evaluation in the field agency or place of employment or with another student at the field agency or place of employment. Students must discuss and get written approval for the project from their field or work supervisor. Students can work individually or in a group of no more than three students. If working in a group, all members must participate in conducting the evaluation. Students must complete an evaluation timeline stating the main evaluation tasks and timeline for completion, along with the responsibilities of each group member if working in a group. In addition, students will complete an evaluation proposal and a final presentation (including PowerPoint slides) for this project.

Evaluation Proposal

Please use the following format to submit your evaluation proposal. The reference list and appendices should be on separate pages at the end. If you are working in a group, you can submit one proposal; however, all students must take responsibility for writing the proposal.

On the title page, include the names of evaluators (e.g., your name and group members' names, if applicable), name of agency and student placed at this agency, and name of program you'll be evaluating.

A. Introduction and Statement of Problem (5 points)

- Problem statement and purpose of your evaluation: Explain the problem, the populations affected by problem, and the intervention you are examining in the evaluation.
- Briefly discuss the significance of the problem and the intervention and their relevance to social work practice and research.
- Briefly state how you will evaluate the impact of the intervention on the problem.

B. Literature Review

Provide a synopsis of the relevant literature, particularly as it relates to your problem and intervention, and prior research and evaluation that have been used to address the problem or analyze the effectiveness of similar types of programs or interventions. Any method of evaluation used in the prior research is acceptable as long as the topic is relevant to your own evaluation. Conceptual articles that highlight the importance of the problem or intervention and your evaluation methods are also important to include, particularly if there is limited research in your area. Summarize and explain how the studies reviewed are related to your evaluation, including:

- An introductory paragraph that introduces the prior research you've found (e.g., "there is limited research on [your problem or intervention]"; "prior research has demonstrated that..."). This paragraph very briefly summarizes the status of prior evaluation or research on your problem, as well as related research on similar interventions to address the problem, and introduces the literature review.
- Summarize prior research outlined in the articles, including the problem addressed, the evaluation or research methods used, including the sample, and key findings. Please integrate findings from studies that are on similar topics (e.g., discuss these studies together).
- A paragraph at the end summarizing the key findings from prior evaluations or research as it relates to the problem or intervention addressed in your evaluation and how prior evaluations inform your evaluation. Discuss how your evaluation refines, revises, or

extends existing knowledge from prior evaluations or research.

Describe the significance of your evaluation and how it contributes to social work research and practice.

C. Program Description and Logic Model

Use a participatory process to engage key stakeholders in developing the logic model.

- Program description: Briefly describe the program, including its history, goals and objectives, nature of the clients served (e.g., race and ethnicity, age, geographic location), and any additional information you think is relevant to explaining the program.
- Logic model: Present your program logic model in a diagram. You must include the following components (see Logic Model Workbook): (1) problem statement, (2) program goal, (3) rationale, (4) assumptions, (5) resources, (6) activities, (7) outputs, and (8) short-, intermediate-, and long-term outcomes. If your agency already has a logic model for the program, you must update it to ensure that it includes the required components.
- Indicate in your paper the specific area or areas on the logic model that will be examined in your evaluation and why those areas are being examined.

D. Evaluation Methods

- American Evaluation Association (AEA) evaluation principles: Discuss how you will abide by the AEA principles as you conduct your evaluation (see <http://www.eval.org/Publications/GuidingPrinciples.asp>).
- Engagement of Key Stakeholders and Purpose
 - Describe strategies for engaging key stakeholders at the agency in the evaluation.
 - Who are the key stakeholders? What is their interest in or perspective on the program or evaluation? What do they want to learn from the evaluation?

- What is their role in the evaluation? How and when will you engage them?
- How might they use the evaluation findings?
- Evaluation questions: State your broad evaluation questions (e.g., similar to research questions), indicating what you and the key stakeholders hope to learn about the program. These questions are related to the type of evaluation you will be conducting. These are not the interview or survey questions used to collect data.
 - Type of Evaluation and Evaluation Design
- Please indicate the type of evaluation you will conduct (e.g., formative, process, outcome, or summative) and your rationale for choosing this method.
- Describe your evaluation design, including:
 - Are you gathering in-depth, detailed information about the evaluation questions (e.g., qualitative information), specific, targeted information (e.g., quantitative information), or both? Explain why.
 - Are you using a control or comparison group?
 - Are you measuring before and after (e.g., pretest and posttest) or only after?
 - Are you collecting data prospectively (e.g., currently), retrospectively (e.g., using existing data sources that have already been collected), or both?
 - Sampling Procedures
- Describe the population from which the sample will be drawn (e.g., the typical population served by this program) and the sampling strategy (e.g., include how you will chose the sample and any inclusion or exclusion criteria, such as demographics or other population characteristics that you want to include or exclude from your sample).

- Please estimate the number of respondents in your sample: If conducting focus groups, you should have at least two groups with approximately 6–10 participants in each. For qualitative, in-depth interviews or surveys, there should be approximately 10–15 participants in your sample. For quantitative or survey research there should be approximately 20–25 individuals in your sample, preferably 25–50. You can use existing data as long as you meet the sampling criteria.
 - Data collection procedures: Describe your data collection procedures including:
 - Procedures and methods: The specific procedures and methods for how you will collect the data (new data) or how data were collected (existing data), including location, people collecting the data, frequency (e.g., how often), duration (e.g., how long), and any other relevant information.
 - Informed consent: Describe procedures and how they will be or were conducted.
 - Evaluation Instrument
 - Describe your instrument or guide (e.g., survey, interview guide, focus group guide). Provide a copy of your instrument or guide in the appendix even if it is still in draft form. Include how you will gather background information on participants.
 - Quantitative measures: If you are using specific measures or scales, describe them, including reliability and validity information from prior research if available. Also include how your measures are scored (e.g., how do you calculate an individual's score; for example, is a mean of all the items calculated?)
 - Describe how you will analyze your data (e.g., using qualitative or quantitative methods, and software you will use, such as Excel or SPSS).
 - Informed consent form or language providing for consent; evaluation instrument

- Survey instrument or interview or focus group guide
- Updated evaluation timeline (typed)
- Written approval from supervisor for conducting the evaluation project

Evaluation Presentation

Presentation slides must be emailed to the instructor by noon on the Friday before your presentation. The instructor will post all presentation slides on the course website so that all students can access them before class. Please submit one set of presentation slides per group or individual. Timing for presentations is approximately 15 minutes (including time for questions). Please do not go over the allotted timeframe so that we have enough time for all students to present on their projects. Points will be deducted if you go over the time limit.

Follow the outline listed below for your presentation. Cover all the points in the outline, and use proper tables, graphs, and other materials to present and summarize your results. You may or may not have time to go over all the required information in detail, so please put more detailed information in the notes section of your presentation slides for grading purposes. Remember to make the recommended changes that were included in your graded proposal.

The following format is required for students' presentation slides for the final presentation of their evaluation projects. These instructions are adapted from the instructions for oral presentations provided to presenters at the annual conference of the Society for Social Work and Research.

- Stick to one idea per slide and use phrases rather than complete sentences.
- Use only six to seven words per line, totaling no more than 40 characters.
- Use no more than eight lines of printing per slide, with a blank line in between each.
- Double check your message. It should be easily grasped in 30 to 40 seconds.

- Simplify graphics and do not reduce artwork to illegible size.
- Use appropriate graphics (e.g., bar charts, tables) to present your evaluation results. Use course presentation slides, the APA manual, and scholarly articles in APA format to help you determine which graphics would work the best to display your results.
- Label all slides using the headings and subheadings listed in the above section on the requirements for content for the final evaluation presentation.
- Use easy-to-read colors, such as white or yellow on a blue background. Please do not use fancy backgrounds unless you are able to easily read the slides when printed.

Outline for Presentation Slides

Title Page

- Program evaluation title, name of agency, and presentation date.
- Evaluator names: Indicate student placed at agency first, followed by group members' names if working in a group.
 - A. Summary of Literature Review
 - Update and provide a summary of the literature review you conducted for your evaluation proposal, including how the studies informed the problem or intervention evaluated.
 - Discuss the purpose of your evaluation and how your evaluation refined, revised, or extended existing knowledge.
 - B. Program Description and Logic Model
 - Program description: Briefly describe your program, including history, goals, objectives, and nature of the clients served (e.g., race and ethnicity, age, geographic location).
 - Logic model: Present your program logic model in chart form. Indicate the specific areas on the logic model that were examined in your evaluation and explain why.

C. Evaluation Methods

Describe the following:

- How you engaged key stakeholders
- Your key evaluation questions
- The type of evaluation and the design
- The sampling method and how you chose the sample
- Your data collection and informed consent procedures
- Your evaluation instrument, including description, sample items, scoring, and reliability if applicable

D. Results

- Description of sample: Provide the number in original sample, total number of final participants, and response rate (%). Summarize demographic information on participants.
- Findings: Use appropriate methods to present findings based on data analysis methods.
 - Quantitative: Present findings using tables, graphs, or charts, and summarize key findings in narrative form.
 - Qualitative: Present themes in narrative form, using quotes from participants.

E. Discussion

- Summarize and interpret your results. Review and answer your evaluation questions.
- Discuss the implications for social work and community partnerships, research and practice, and recommendations for how the agency and other key stakeholders might use the findings to inform practice.
- Discuss the strengths and limitations of your evaluation methods and design, including threats to internal and external validity.

- Discuss lessons learned and any suggestions for future evaluations of the program.
- References and Attachments
 - Include a slide with all references in APA format on the last slide.
 - You must also attach your final evaluation instrument and informed consent form.
 - Group names and responsibilities for evaluation and presentation.

APPENDIX 9D: ONLINE EXERCISES

Online Analysis Exercise 1: Building Online Logic Models

- For this exercise, you will work alone or in pairs to develop a logic model using the Innovation Network Logic Model Builder. The Logic Model Builder will allow you to create and edit the logic model online. You will select one of the following two cases that are posted to the course website to use for your logic model. (Note: You can use any macro practice case studies for this exercise; below are two examples of actual programs that students can look up online; summaries of these programs were also provided to students).
 - ▶ **LOGIC MODEL CASE A: *Wraparound Services***
 - ▶ **LOGIC MODEL CASE B: *Community Organizing and Family Issues Program (COFI)***
- The above case studies are actual programs. The basic information about the programs is included in the case descriptions; however, you may conduct additional research on these organizations to complete this exercise. For this exercise, please complete the following steps:
- Listen to the two podcasts: “But Why Here: Developing a Logic Model — Parts 1 and 2.” These podcasts discuss logic models and their importance to coalitions and collaborations.

- Create one account on the Innovation Network's Website: www.innonet.org (this site is also posted on the course website). See "Tools and Resources at Point K" in the lower right-hand corner of the screen and click on "Register" to create a new account. If working with a partner, you will register using one student's name and e-mail address. Then you and your partner can access the account with the username and password that you create.
- Create a logic model based on the case study you have selected. If working with a partner, divide the responsibilities, with each person taking the lead on developing specific components of the logic model. Work together to edit and finalize the logic model. For your logic model include the following components: (1) problem statement, (2) program goal, (3) resources, (4) activities, (5) outputs, and (6) short-, intermediate-, and long-term outcomes. You must use the Logic Model.
- Use the workbook on U-Learn as your guide to develop these components. The workbook provides examples of each of the logic model components.
- Submit your logic model online to the course website by the deadline, providing the following information:
 - If working with a partner, please indicate the names of people working on the logic model and which components of the model each person took the lead on.
 - The case you selected and why you selected that case.
 - The username and password you created on the Innovation Network website (so that I can access the logic model to review and grade it).
 - The name of the logic model that you created on the website.

Online Exercise 2: Developing an Online Survey

- For this exercise, you will work alone or with the same partner you worked with to develop a logic model for Online Exercise 1. For this exercise, create an online survey to evaluate a program described in the case study. Use Survey Monkey to create your online survey. Use the same case studies for this exercise that you used in Online Exercise 1:
 - ▶ **CASE A: Wraparound Services**
 - ▶ **CASE B: Community Organizing and Family Issues Program (COFI)**
- For this exercise, please complete the following steps:
 - Create one free account for your group on the Survey Monkey website: www.surveymonkey.com (also see link on the course website). You will need to register using one student's name and e-mail address; however, once you register, all group members can access the account with the username and password.
 - Decide what program or aspect of the program you want to evaluate. Designate the specific area or areas on the logic model you will examine in your program evaluation (use the logic model you created for the last exercise).
 - Develop one to three overall evaluation questions for your program evaluation. Decide what type of evaluation you will conduct: formative, process, outcome, or summative evaluation.
 - Decide on your sample: Whom will you send the survey to (be specific about the sample characteristics)? How many people will you send the survey to? What type of sample is this?
 - Create an online survey based on the case study you have selected and the overall evaluation questions you developed. Use the Survey Monkey Manual posted on U-Learn to help you create your survey. Divide responsibilities among your group members, with each person taking the lead on developing specific questions for the survey. Work together to edit and finalize the online survey.

- Under the Design Survey Tab, create 10 questions for the survey: 5 closed-ended questions and 5 open-ended questions. For closed-ended questions use a Likert scale or other type of closed-ended response format. Please refer to the Smart Survey document to assist you.
- Under the Collect Responses Tab, use the “create a web link” option to create a web link for your survey.
- You or your partner will submit your Online Survey in the Assignment Tool by providing the following information:
 - If working with a partner, you and your partner’s names and responsibilities in completing this exercise, including the survey questions each person took the lead on developing.
 - The program or aspect of the program you selected and the specific area or areas of the logic model you are evaluating.
 - Your overall evaluation questions for your program evaluation, the type of evaluation you are conducting, and why.
 - The type and description of your sample.
 - The web address or link to your survey (you can copy and paste the web address created on the “Collect Response” tab on Survey Monkey).

APPENDIX 9E: CULTURAL COMPETENCE EVALUATION ASSIGNMENT

Agencies often provide initial training to staff regarding the cultural needs of the people they serve. As with any program, design and implementation are only a part of the process of good program management. For this assignment, you will use the cultural assessment model described by Bowen (2008) to evaluate the cultural competence of your practicum site. Use the following outline to prepare an 8- to 10-page evaluation report in which you identify areas of strength and weakness. The paper should conclude with an initial program recommendation to improve cultural competence.

- 1) Identify the agency you are evaluating. Provide a brief overview of the agency's vision, mission, goals, population or condition served, and programs or services provided.
- 2) Describe any activities the organization has undertaken to assess the cultural responsiveness of the organization.
- 3) What is the fit between the cultures of agency staff and that of the clients' culture?
- 4) What type of cultural responsiveness training, if any, has the agency used?
- 5) Does training address only awareness? Does it focus on knowledge? Does it attempt to develop skills? Is it culture-specific or culture-general? Provide a rationale for your decisions.
- 6) Does the agency have client representation on the board of directors or on committees?
- 7) Use the document review instrument included in Bowen (2008, p. 12, Table 4) to evaluate organizational documents identified in the instrument. Use the instrument guidelines to analyze the documents.
- 8) Base the analysis on the following parameters:
 - Definition of culture and cultural group;
 - multicultural, antiracist, or equity orientation;
 - voluntary or required action;
 - individual or organizational focus;
 - provider competence or client or community access focus;
 - approach to human resource management;
 - approach to cultural training.
 - Describe the extent to which the organization has adopted best practices and the agency's approaches to addressing issues of diversity in services indicated through the identified documents. Discuss areas of strength and weakness. Use relevant literature to support your conclusions.

- Provide a recommendation to improve cultural competence. State your approach (policy, program, project, personnel, or practice) and your rationale for selecting this approach, including political and interpersonal considerations, resource considerations, and how well your intervention would or would not succeed.

APPENDIX 9F: SOCIAL MAPPING

Social mapping is a method to identify households based on indicators that the community agrees on in a very participatory process.

Example

Prepare a base map on which all the households of the area being analyzed are located (e.g., a village, a neighborhood, a rural zone).

Ask the participants to code each household according to its level of well-being in comparison to others. Each level can be given its own symbol or color code. Make sure you crosscheck the coding of each household by ensuring there is consensus about the code. In this way, a base map can be made in which households are clustered according to different rankings of well-being. Include a legend on the map that explains the symbols and codes.

Now focus on the indicators in which you are interested (e.g., “school attendance of children,” “involved in a certain project activity,” “member of a micro-credit group”). Code each household according to its status.

The base map can then be used to monitor the well-being of each household from year to year and to relate the households to changes introduced by a project. This makes it possible to examine whether there are any impacts occurring on well-being or other socioeconomic indicators in focus and, if so, how the “impacts may affect different social groups” (Guijt & Woodhill, 2002).

Guijt, I. M., & Woodhill, J. (2002). *Managing for impact in rural development: A practical guide for M&E*. Rome, Italy: International Fund for Agricultural Development.

Macro Tools for the Field

GUIDELINES AND FRAMEWORKS FOR MACRO PRACTICE FIELD EDUCATION

Social work includes a field practicum or internship as a major means for students to obtain the hands-on knowledge and skill in real time, under supervision of a field instructor. The field component is known as the profession's signature pedagogy because of the investment of time, resources, and credits allocated by BSW and MSW programs.

The field component requires an intensive and extensive relationship between a student and a social work degreed and formally trained field instructor. This person is usually an agency staff member or someone hired by an agency to provide the social work component. The title *field instructor* is used by EPAS 2015 because of the educational component that accompanies the role. Many macro students also have a preceptor or task supervisor, who may not be a social worker and who provides on site-specific skills and day-to-day direction.

Given the diversity of field placements and field assignments for macro students in community, organizational, and policy practice settings, this "Macro Tools for the Field" section provides a variety of written exercises and projects to demonstrate practice behaviors at the macro level. Together with self-reflective logs or narratives, and detailed performance evaluations each semester, these tools can be used to assess competency in field placements by field instructors and by field advisors or liaisons assigned by the social work program.

In addition to this section of the guide, each of the nine competencies includes a section titled “Field-Related Activities,” which classroom faculty can use to link theory and practice, to assist students in applying concepts to actual field work assignments, and to bring the world of macro practice into the classroom.

NASW CODE OF ETHICS REVIEW

CSWE Competency 1: Demonstrate Ethical and Professional Behavior

Objective:

- To understand and apply ethical principles articulated by the NASW Code of Ethics within an agency context.

Directions:

- Review the NASW Code of Ethics. Discuss how the NASW Code of Ethics applies to the agency’s practice and work with clients and communities.
- Identify a conflict or ethical dilemma in practice at your agency. Discuss how the best interests of an individual can be in conflict with the best interests of the organization or community.
- Using the NASW Code of Ethics, identify the core values that relate to this dilemma or conflict. Discuss the implications. How does the NASW Code help us to approach this dilemma? What factors do you need to consider? How do you balance conflicting interests? Using a macro practice perspective, think about the larger system issues involved and consider social and economic justice issues.

SOCIAL WORK POSITION PITCH

CSWE Competency 1: Demonstrate Ethical and Professional Behavior

Objective:

- To reflect on the professional skills and competencies of social workers and express the utility of a macro social work skill set within a specific agency or professional context.

Directions:

- Consider the knowledge and skills of social work profession.
- Draft a social work job description for field setting.
- Include a documented rationale for hiring social worker.
- This may include models of social workers in similar settings or accomplishments and contributions of student as field intern.
- Include cost analysis.
- Pitch to supervisor, board of directors, or other relevant stakeholders

FIELD ASSIGNMENT: CAREER PLANNING FOR MACRO STUDENTS

CSWE Competency 1: Demonstrate Ethical and Professional Behavior

Identify three employment opportunities or job postings that might meet some of your employment goals. These could include positions requiring a social work degree or other professional credential. For each opportunity, please address the following:

- What aspects of the position draw you (e.g., agency context, population served, job responsibilities, location, salary, opportunity for advancement)?
- Select one of these opportunities and prepare a cover letter highlighting work samples, accomplishments, and experiences that would demonstrate your developing knowledge, skills, and abilities

you would bring to that position. Indicate why a social work degree would add value if the job does not call for a social work degree.

- Identify two potential interview questions you think are challenging to answer with confidence.

MACRO CULTURAL COMPETENCE

Contributed by Giselle Ferretto

CSWE Competency 2: Engage Diversity and Difference in Practice

Objective:

- Often when the cultural competence continuum (Rauch et al., 1993) is considered, it is applied to an individual's status and growth concerning their cultural competence and development. This assignment asks students to apply this continuum to macro-level practice.

Directions:

- Read a 5-page handout: *A Guide to Infusing Cultural & Linguistic Competence in Health Promotion Training*, National Center for Cultural Competence, Georgetown University Center for Child & Human Development (<http://nccc.georgetown.edu/projects/sids/dvd/continuum.pdf>).
- For each stage on the continuum, identify agency policies, laws, regulations, procedures, and historical events that best illustrate the concept. Examples: Slavery is an example of a macro-level system that was culturally destructive. The federal policy of "Don't Ask-Don't Tell" is a macro-level example of being culturally blind.
- Identify five policies at your field agency or ones that affect the population it serves. Identify each policy and assess where it is on the cultural competence continuum. Briefly explain why you selected that area on the continuum. What modifications could be made that would bring it closer to a more positive stage along the continuum? What would be needed to implement that change?

AGENCY HUMAN RIGHTS ANALYSIS

CSWE Competency 3: Advance Human Rights and Social, Economic, and Environmental Justice

Objective:

- To use existing human rights frameworks to evaluate community or organizational settings from a rights-based perspective.

Directions:

- Refer to either the United Nations *Universal Declaration of Human Rights* or *Convention on the Rights of the Child*.
- Locate articles within the document—individual human rights—that relate in some way to your agency or community setting.
- Using language and concepts from either of these documents, evaluate your agency or community setting in some of the following areas:
 - Mission, vision, or purpose: Does the mission, vision, or purpose statement use any human rights language? How might adopting a human rights perspective in the mission, vision, or purpose statement affect the work of the organization?
 - Programs and campaigns: Do any of the programs or campaigns within the agency or community setting use human rights-based concepts? How do human rights show up in the work of the organization or in the community? Are there ways existing programs or campaigns could better advance the human rights of those involved?
 - Messaging: What does the messaging of your organization or community setting look like? How could you integrate a human rights perspective into the brand or messaging of your organization?
 - Are there rights that are not addressed in your organization or community setting? What are these rights, and why are they

not being adequately addressed? What could your agency or community do to more adequately address these rights?

APPLYING RESEARCH TO PRACTICE IN THE FIELD

CSWE Competency 4: Engage in Practice-informed Research and Research-informed Practice

Objective:

- To identify and apply current research that is relevant to a specific agency's practice area.

Directions:

- Student identifies a research article that is relevant to the work the student is doing in the agency. The research can be related to the area of practice, the community or population served, theories of intervention, or related to organizational practice (e.g., use of interprofessional teams, use of data, management).
- Student presents a review of the research article to field instructor, possibly with other team members or agency staff. Student facilitates a discussion of the article or research with a focus on the implications for the agency or agency practice in the community.
- Student prepares brief article, blog post, or other document for the agency based on a review of the article and discussion with field instructor and staff.

POLICY COMPOSITION

CSWE Competency 4: Engage in Practice-informed Research and Research-informed Practice

Objective:

- To use community, organizational, and professional resources to create effective social policy.

Directions:

- Interview key stakeholders (e.g., lead staff, board of directors, program managers) and identify policies needed based on organizational needs or occurrences (e.g., high turnover, lack of orientation or training, workload expectations).
- Use critical thinking and analysis to determine what policies link to organizational needs and occurrences.
- Conduct a literature review or consult with other agencies to identify applicable best practice and standard policies.
- Draft a new policy.
- Submit to initial stakeholders for review.

TRAUMA-INFORMED COMMUNITY OR ORGANIZATIONAL INTERVENTIONS

CSWE Competency 4: Engage in Practice-informed Research and Research-informed Practice

Objective:

- To demonstrate an understanding of trauma-informed principles to create a trauma-informed community or programmatic intervention.

Directions:

- According to SAMHSA’s concept of a trauma-informed approach, “A program, organization, or system that is trauma-informed:
 - Realizes the widespread impact of trauma and understands potential paths for recovery;
 - Recognizes the signs and symptoms of trauma in clients, families, staff, and others involved with the system;
 - Responds by fully integrating knowledge about trauma into policies, procedures, and practices; and

- Seeks to actively resist retraumatization. A trauma-informed approach can be implemented in any type of service setting or organization and is distinct from trauma-specific interventions or treatments that are designed specifically to address the consequences of trauma and to facilitate healing.”
- The Substance Abuse and Mental Health Services Administration’s Six Key Principles of a Trauma-Informed Approach: A trauma-informed approach reflects adherence to six key principles rather than a prescribed set of practices or procedures. These principles may be generalizable across multiple types of settings, although terminology and application may be setting- or sector-specific:
 - safety
 - trustworthiness and transparency
 - peer support
 - collaboration and mutuality
 - empowerment, voice, and choice
 - cultural, historical, and gender issues
- Create (or discuss) a plan to guide the design and implementation of a community or program intervention that specifically targets your field agency’s population and takes a trauma-informed care approach.
- Be sure to attend to the following in your planning:
 - Knowledge you have gained from course readings and discussions, discussions with your agency staff, and knowledge of and interaction with clients or the community.
 - Student and field instructor discuss how to gather further evidence, knowledge, or information to inform the plan.
 - Research known trauma-informed interventions for organizations, programs, and services.
 - Consider the extent to which your plan respects diversity and reflects the communities your agency serves.

- Discuss the resources that will be needed to carry out the plan (e.g., staff resources, outreach efforts).
- Think about and discuss how to measure outcomes from your intervention or change effort.
- Discuss how changes in underlying theories, models, or approaches affect practice and agencies.

A DAY IN MY LIFE

Contributed by Giselle Ferretto

CSWE Competency 5: Engage in Policy Practice

Objective:

- To identify the role of social policy in daily living activities and to increase knowledge of an agency's purpose and program scope.

Directions:

- Part 1: Set up a document with two columns. Identify a full day and record your general activities on one side of the document. Then go back and try to identify the state and federal agencies that have some connection, jurisdiction, or authority over the activity.
- Some helpful resources include the following:
 - All states have administrative procedures or regulatory procedure provisions. Search your state for a list of state agencies and the regulatory procedures under which they operate. For example,
 - the Maryland Manual (for state agencies and laws—it is located under the “Executive Branch”) (www.mdarchives.state.md.us/msa/mdmanual/html/mmtoc.html).
 - In California there are two sources: the California Code of Regulations (CCR; www.oal.ca.gov/publications/ccr/) and the California Administrative Procedure Act (www.oal.ca.gov/state-and-federal-laws/).

- The Index of U.S. Government Departments and Agencies (for federal agencies and laws) ([www.firstgov.gov/Agencies/Federal/All Agencies/index.shtml](http://www.firstgov.gov/Agencies/Federal/All%20Agencies/index.shtml)).
- After listing the agencies, identify whether they are a state or federal agency with an “s” for state and an “f” for federal.
- Part 2: Select five agencies that you have identified and for each one write a brief summary of its purpose or function, scope, and how it affects people’s lives.

Partial sample of Part 1 (for discussion with student). Note these are all state agencies and only a small sample of the various agencies which have jurisdiction over the activities.

Name:	Date:
I got up from the sound of my alarm. I made and drank a cup of tea and fed the rabbit.	Pesticide Regulation Section State Council on Cancer Control
I then took a shower and dressed for work. I then woke up my son and fixed him pancakes for breakfast. I ate a bagel with cream cheese and took my allergy medication and packed his lunch. After we ate breakfast he got dressed while I packed up the car for work and school.	Division of Primary Care Egg Inspection Grading Grain Section Office of Food Safety Office of Resource Conservation MD Health Care Access & Cost Commission Insurance Commission State Board of Pharmacy Air & Radiation Management Administration Office of Epidemiology & Disease Control State Board of Physician Quality Assurance
I drove him to school for before-school child care and then got gas for the car.	Office of Child Care Motor Fuel Tax Unit Insurance Fraud Unit, Office of Attorney General Non-public School Accreditation Branch

<p>I drove to Annapolis from home.</p>	<p>State Board of Pilots MD Transportation Authority Board of Public Works Motor Vehicle Administration Wetlands Administration M-Tag Division <u>Division of Tourism & Promotion</u> Environmental Noise Advisory Council MD State Police</p>
<p>I met with three interns and their field instructors for their semester liaison meetings.</p>	<p>State Board of Social Work Examiners Department of Budget & Fiscal Planning Safety Inspection (Elevators) State Board of Architects</p>
<p>Then I went to lunch and returned to Baltimore to finish preparing for a presentation. These preparation activities include coordinating with other event planners, organizing materials and sending e-mails, and securing funding for students who were attending a training event.</p>	<p>Office of Minority Affairs Equal Opportunity Office Occupational Safety & Health Board Comptroller of the Treasury Department of Personnel State Department of Assessments & Taxation</p>
<p>I returned home to make and have dinner with my son and my mother. After dinner I emptied the trash and cleaned the kitchen while my son did his homework, then I reviewed it.</p>	<p>Public Drinking Water Program Housing and Long-Term Care Division Waste Management Administration MD Science Week Commission Fire Department Parole & Probation</p>
<p>My son went in the basement to play Nintendo 64 games while I washed some laundry.</p>	<p>Video Game Rating Board Lead Paint Commission Asbestos Oversight Committee Office of Planning & Zoning (Baltimore County) Water Management Administration Water Resources Administration Hydrogeology Program</p>
<p>We watched some TV, then we read our books, said prayers, and he went to bed. I worked a bit on the computer and then went to bed.</p>	<p>Telecommunication Division of Public Service Commission Office of the Attorney General</p>

POLICY “ASK”***CSWE Competency 5: Engage in Policy Practice***

Objective:

- To demonstrate an understanding of social policy and to practice engaging communities to work on a policy level. (Recommended as a semester-long activity with included evaluation measure.)

Directions:

- Identify individuals invested in advancement of policy on behalf of target population (e.g., parents with kids who have special needs, caregivers of older adults, formerly incarcerated people seeking employment, veterans in need of housing).
- Design simple, approachable training on relevant policies, whether governmental, agency specific, or intragroup (e.g., school system, military, nursing facility).
- Invite for community gathering.
- Give training and include component that participants can do: the “ask” (e.g., send letter, begin attending community group, commit to action item).
- Give additional training and share prior attendees’ information, with permission, to mobilize and empower or equip past participants to conduct trainings.
- Use evaluation to track action taken and elicit participant feedback.

GUIDE FOR A MEETING ANALYSIS***CSWE Competency 6: Engage With Individuals, Groups, Organizations, and Communities***

Objective:

- To reflect on and identify various strategies, organizational tools, and power dynamics present with agency meetings.

Directions:

- Complete a meeting analysis, using a meeting from your field placement to answer the following questions:

A. Identifying Data

Name of organization, sponsor or agency, date of meeting, number of members, number in attendance, name of worker.

B. Premeeting

- 1) Student's preparatory work (research or administrative tasks) for the meeting.
- 2) Agency or community events that took place before the meeting that have bearing on the meeting.
- 3) Student's role at meeting: observer, participant, co-leader or leader, organizer?
- 4) Student's activity with individuals and subcommittees (e.g., relating to problems, decision making, positions, and strategies) (see D).

C. Purposes

Purposes of the meeting and primary content areas expected to be covered.

D. Content of the Meeting

This section should be descriptive rather than interpretive or evaluative. It should report on behaviors or actions that took place and should do so as specifically as possible. In each instance, the activities of the worker should be described. The meeting should be reported in chronological order.

The following areas should be covered:

- 1) points, issues or problems that were raised'
- 2) decision-making (what decisions were made or not made? how?)
- 3) positions and strategies

Once a position or issue was decided upon, what means or strategies were discussed or developed for proceeding on the issue? Was a goal or rationale

indicated? Who participated in discussion? Indicate differences of opinion or conflicts that took place (e.g., regarding individual members, officers, outsiders, workers). What happened?

E. Analysis of Meeting

Use a race, class, and gender lens and address the power dynamics observed at the meeting. What motivated the decisions made? Who seemed to have major influence? Possible consequences to group of its decision making? What significant values were expressed?

How were personal relationships and group alignments affected by the discussion? Indicate the activities revealing the group or organization's relation to its sponsoring agency, other organizations in the community, important people, and significant groupings. What, if any, were the dangers or risks to the group in its pursuit of strategies? Positive dynamics as well as any conflict or potential conflict stemming from strategies? Community forces at work? What is your opinion about these?

F. Opinions or Impressions

- What problems, question, issues, value conflicts did the meeting raise, if any?
- What roles (if any) did the student play in the meeting? Were the student's objectives met?
- Why or why not? What worked well? What would the student do differently?

G. Follow-Up and Predictions

- What prediction would the student make about the future course of the group or subsequent meetings?
- Any significant events occurring after formal ending of meeting? Does the student have any plans for follow-up related to the meeting? What? Why?
- How is the student going to use this information in her/his assignments?

ALTERNATIVE: MEETING ANALYSIS

Format

The introduction to your paper should include the meeting date, time, and place, as well as the sponsoring organization and overview of the agenda.

In the body of the paper, discuss each of the following themes. To help you in the process, under each theme is a set of questions that you could include in your discussion.

Meeting Content

- What was the content of the meeting?
- What policy issues were discussed during the meeting?
- How did the issues discussed at the meeting relate to social, economic, or political change or equity?

Meeting Power Dynamics

- Who seemed to define the agenda?
- Who was doing most of the talking? Why?
- If community residents were present, how was (or was not) their voice present or recognized in the meeting? How did they participate in the policy discussions (frequency, intensity, driving the agenda)?

Meeting Effectiveness

- Was the meeting effective? Why or why not?
- Did the meeting seem to be part of a larger overall strategy for policy change? How?
- What would you have done to make the meeting more effective?

The paper should be 7-10 double-spaced pages.

ORGANIZATIONAL ENVIRONMENT AND MISSION ANALYSIS

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

Objective:

- To critically reflect on key factors of student’s task environment and greater organizational environment within their field placement.

Directions:

- Use the Task Environment Chart (below) to conduct analysis of the task environment chart of your practicum agency. Provide a description of each item with some details. For example, regarding “other organizations,” explain how it relates to “other organizations.” (The information you need for this assignment may be found in the organization’s annual report or “about us” on its website.)
- Use the organization information form to identify organization’s mission, goals and objectives, vision, values, and programs and services.

Task Environment Chart		
Organization Name		
Organization Website		
ELEMENTS IN THE TASK ENVIRONMENT		BRIEF DESCRIPTION
Clients	Past, present, and potential clients, geography, etc.	
Other organizations	Is the organization connected with any other organizations? If so, in what ways? Name a few of these organizations.	
Funding sources	List the main funding sources, percentages.	
Private insurance companies	Does the organization accept any private insurance for the services it provides for its clients?	

Government programs	Does the organization receive support from any government programs, such as Medicare, Medicaid, Supplemental Security Income, or Temporary Assistance for Needy Families?	
Professional organizations	Are there any professional codes of conduct that employees must comply with (e.g., NASW)?	
The media	Does the agency appear in or use any media?	
The general public	Is it supported by the public? How is it viewed by the public?	

ORGANIZATION INFORMATION FORM

Identify the organization’s mission, goals and objectives, vision, values, and programs and services.

Organization name	
Website	
Mission	
Vision	
Values	
Goals	
Objectives	
Programs and Services (list at least two programs or services and provide a brief description of them)	

SWOT (STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS) ANALYSIS

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

Objective:

- To practice using a SWOT analysis to begin the process of strategic planning within a specific agency context.

Directions:

- SWOT analysis is a strategic planning method used to evaluate the strengths, weaknesses, opportunities, and threats of an organization. It involves specifying the objective and identifying the internal and external factors that are favorable and unfavorable to achieving that objective.
 - **Strengths:** characteristics of an organization that give it an advantage over others
 - **Weaknesses:** characteristics of an organization that place it at a disadvantage relative to others
 - **Opportunities:** external chances for the organization to develop in the environment
 - **Threats:** external elements in the environment that could be negative factors for the organization.
- Apply SWOT analysis to your field placement organization.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

GROUP PROPOSAL OUTLINE

Contributed by Giselle Ferretto

CSWE Competency 8: Intervene With Individuals, Families, Groups, Organizations, and Communities

Objective:

- To practice planning a community or group intervention in a specific agency or community context.

Directions:

- The following outline identifies the questions macro practitioners need as they contemplate planning and implementing a group.
- Answer all the questions as specifically as you can, explaining the justification for your proposed intervention.

- There are many helpful group assessment models that may serve as a guide. If your field assignment is to co-lead an existing group, then answer the following questions as they relate to the current group.

1) What unmet needs will be met by the group?

- How were these unmet needs identified?
- What benefits might a group experience provide for the target population?
- What is the purpose of the group? By the end of the group, what will be the outcomes; what will the members have achieved?
- Describe the kind of group it will be. Examples include therapeutic, educational, problem-solving, self-help, socialization, personal growth, T-group, preventive or remedial, open or closed group, task-action, natural or formed, short-term, ongoing, single session, homogeneous or heterogeneous membership, or focus group.
- What will the structure of the group be?
 - number of meetings
 - frequency and duration of meetings
 - length of individual meetings
 - location of meetings
 - size of group
 - number (and roles) of group leaders or facilitators
- What will the composition of the group be?
 - age and sex of members
 - demographic characteristics (social, cultural, economic)
 - developmental issues associated with the age of members
 - behavior (physical, emotional) associated with the developmental stage of its members

- What are the specific topics for each session? Arrange the topics in chronological order after reflecting on the stages of group development (initial, transition, working, ending).
 - For each session, develop the specific agenda or curriculum. Identify at least one activity that will facilitate the goal of that specific session.
- 2) What materials are needed to facilitate the group process? Are there any costs associated with the group? If so, how will the costs be met?
- What are the anticipated rules or norms of the group? Describe the best process to establish the rules of the group to increase member buy-in to the rules (contracting).
 - How will members be recruited and oriented to the group? If children are members, how will the appropriate guardian permission be sought? Who are the key people in the agency to help facilitate the participation of specific group members?
 - Are there any agency policies that will affect the group's development?
 - How will the group progress be recorded? Will individual member attendance be recorded? If so how?
 - How will the issue of confidentiality be addressed? What are the specific practices and policies related to confidentiality that relate to the population and setting? Any ethical considerations? Conflicts of interest?
 - *Self-awareness*: What are your strengths and areas of growth that will affect your role of leader or facilitator of this group? What would you like your field instructor to do to assist you in this process?
 - Reflect on the physical location of the meeting place of the group. How might the room be arranged to facilitate group process?
 - Reflecting on the stages of group development (initial, transition, working, ending), what issues might you anticipate with the population of the group? Identify any strategies you might use to address the issues identified.

- Describe the ending process for this group. Identify one activity that will facilitate the ending.
- Describe the process to evaluate the group progress and outcomes.

DEFINING OUTCOME MEASURES

CSWE Competency 8: Intervene With Individuals, Families, Groups, Organizations, and Communities

Objective:

- To practice planning a community or group intervention in a specific agency or community context, with a focus on how that intervention will ultimately be evaluated.

Directions:

- Choose one group, community, or policy intervention at your agency.
- For that intervention:
 - Identify the outputs of this service. How are the outputs measured?
 - Identify the intended outcomes of the service.
 - What indicators would you look for to determine whether you have achieved your intended outcomes?
 - What obstacles might make it difficult to measure outcomes?
 - What are the benefits to your agency of measuring the outcomes of this service or program?

METHODS EVALUATION: EVALUATING AGENCY'S RESEARCH AND EVALUATION METHODS

CSWE Competency 9: Evaluate Practice With Individuals, Families, Groups, Organizations, and Communities

Objective:

- To review agency's program evaluation methods and practices.

Directions:

- Discuss how reliable, valid, and relevant information is needed to support evidence-based practice today.
- Examine the agency's current evaluation methods (may need to focus on one program or service). How does the agency measure outcomes and use results?
- Discuss the difference between outputs, outcomes, and indicators.
- Discuss the specific tools or methods used to evaluate the agency's services or programs and how this information is used. Specifically focus on how the data inform practice interventions and improve quality of services.

FIELD ASSIGNMENT: ANALYSIS OF PROJECT

CSWE Competency 9: Evaluate Practice With Individuals, Families, Groups, Organizations, and Communities

Describe a tangible product (e.g., a flyer, outreach plan, policy brief) you created in your field placement.

- 1) Provide a brief introduction to the project. Include the purpose and the context; indicate whether you worked on it alone, as part of a committee/work team, consulted with others, and so on.
- 2) Describe the process you followed to accomplish it. Include background research or review, consultation with internal or external key informants, review and revision, how it was finalized, and how it was disseminated.
- 3) Reflections, challenges, lessons learned, and questions include the following:
 - political considerations;
 - resource-related considerations;
 - challenges and how you addressed or overcame them;
 - reflections on its effectiveness (include what worked well and how you knew), what lessons were learned, what you might consider when you face a similar project);

- connection to competencies and readings, lectures, and discussion in your methods course.

4) Include the project document as an appendix (if feasible).

AGENCY ASSESSMENT

Contributed by Giselle Ferretto

CSWE Competency 9: Evaluate Practice With Individuals, Families, Groups, Organizations, and Communities

Objective:

- To more fully understand the inner workings of an agency by analyzing various aspects of its current and historical function.

Directions:

- Using student's field agency as the topic of assessment, students should complete the following assessment form:

Agency Assessment	
Name of Agency or Organization:	
Person Completing Assessment:	Role in agency:
Academic year this assessment was completed:	
History of the Agency or Organization	
Describe the origin of the agency or organization (when, why, how this agency or organization was formed).	
Identify any significant events that are part of the history of this organization.	
Mission and Vision of the Organization	
Does the agency or organization have a clear vision and mission statement? <input type="checkbox"/> yes <input type="checkbox"/> no	If yes, where is the mission statement explained:

Mission Statement:	
Staff (use additional sheet if needed)	
Name	Position
	Length of time with organization
CONSTITUENCY OR SERVICE	
Is the agency or organization: <input type="checkbox"/> Private <input type="checkbox"/> Public <input type="checkbox"/> For-Profit <input type="checkbox"/> Nonprofit	
The agency or organization's description of a client or customer	
Where is the client or customer defined (in bylaws? statute? regulations)? Or is there an informal definition?	
Describe the population the organization attempts to serve.	
Describe the services provided. Include the following: voluntary services or mandated services; primary or secondary prevention, response; social criteria, income eligibility, other; short-term, open-ended; psychoeducational, therapeutic, or self-help.	
Average number of people served per year (any trends related to population served to note?).	
Points to consider when reflecting on developmental theory as it relates to the population served.	
Points to consider when reflecting on social role theory and systems theory as it relates to the population served.	

List some of the federal and state laws and regulations that affect the service delivery of this agency.		
Describe the diversity of the client or customer population.		
Describe the diversity of the staff.		
LEADERSHIP AND LEADERSHIP DEVELOPMENT		
Identify the leaders in this agency or organization (attach list of the board members):	Their position in the organization:	
Does the agency or organization have a plan for the development of new leadership?	<input type="checkbox"/> yes <input type="checkbox"/> no	
If yes, identify their leadership development plan. Describe the opportunities for new people to work their way into leadership.		
Does the agency or organization receive any technical assistance (TA) from outside the organization? <input type="checkbox"/> yes <input type="checkbox"/> no	If yes, identify TA providers:	Topic of TA provided in the last year:
In what ways is the agency or organization recognized by other organizations or institutions in the community?		
FINANCIAL SELF-SUFFICIENCY		
Sources of Funding	Amount of Funding	
	\$	
	\$	
Total budget: \$		
What percentage of the core operating income is raised from fees or charges?	What percentage of the core operating income is raised from grants?	What percentage of the core operating income is raised from events?

What percentage of the core operating income is raised from state or federal budget allocations?	Other?
Describe how the leaders are involved in fundraising.	
Describe how staff is involved in fundraising.	
Describe how volunteers are involved in fundraising.	
Identify the fundraising activities of the agency (grant writing, phone-a-thon, direct mail, public budget process, other).	
Describe how these activities have changed over the history of the agency or organization. Do they demonstrate more skill or have more activities each year?	
Capacity and Self-Sufficiency	
What indicators have been observed that indicate that the agency or organization is growing?	
What is the strategic planning process? How are staff and clients, partners, and others raising questions and proposing new strategies?	
Describe the relationships with the geographic community. Note any significant changes over time.	
Describe the relationships with the professional community. Note any significant changes over time.	
What is the public perception of the agency or organization? (Give specific examples from articles, news reports, research, others?)	
What are the trends in the larger society, and how does the agency or organization stay ahead or incorporate changes?	

Decision Making	
Describe the decision-making process used by this agency or organization (e.g., democratic, parliamentary, hierarchy, participatory, transparent, closed).	
What possibilities are in place that give staff and clients an opportunity to raise issues and opposing points of view?	
Describe power in this agency or organization and the distribution of power.	
Identify the critical decisions being made by this agency or organization.	
Identify the critical decisions and issues not being addressed by this agency or organization.	
Describe how the agency or organization has influenced the decision making of other organizations or institutions.	
Issue Identification and Institutional Change	
List issues identified by the agency or organization. How do you know this? Is the issue contained in minutes? agency report? audit? observed?	
Describe how these issues are communicated.	
Identify the problems associated with these issues.	
Identify behaviors observed that indicate a level of commitment to working on these issues.	

How is the power or expertise (needed to resolve those issues) being developed?	
Name the targets of change that have been identified.	
Evaluate the progress being made on the resolution of those issues.	
Describe the agency or organization's strength to endure to see the resolution of the issue.	
Other information to note?	

