Semester/Year: Spring 2018

Course Title: Budgeting and Financial Management

Course Prefix/Number/Section: SOCW 5325-001/002

Instructor Name: Dr. Richard Hoefer

Office Number: Building A, Room 214

Phone Number:

Email Address: rhofer@uta.edu

Office Hours: by appointment

Day and Time (if applicable): online only

Location (Building/Classroom Number): online only

Equipment: A laptop computer with wireless capability or equivalent is required for all SSW classes. You don’t need a laptop for this class but you do need a computer and Microsoft Excel.

Blackboard: https://elearn.uta.edu/webapps/login/

This course presumes a basic knowledge of Microsoft Excel. If you do not already have a basic knowledge, then you MUST acquire it on your own. The actual skills needed are listed later in this syllabus. There is an assignment you must complete showing you have these basic skills.

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

Note: In case of error or ambiguity in the syllabus, the instructor’s determination is final.
A. Catalog Course Description/Special Requirements (Prerequisites/Out of Class Meetings):

Basic overview of financial management applied specifically to human service agencies; emphasizes on basic concepts and skill building in budgeting, and fund raising; accounting principles, financial statements, and computerized financial information systems also covered. Prerequisite or concurrent enrollment: SOCW 5312.

B. Measurable Student Learning Outcomes - CORE/Advanced Practice Behaviors:

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

C. Required Text(s) and Other Course Materials:

Martin, L. (2001). *Financial management for human service administrators*. Boston: Allyn & Bacon. [Electronic PDF copies of this text will be distributed to students during the course through Blackboard for Spring 2018. This is courtesy of the Author, as the book is now considered out of print. Students may print out these pdfs if they desire.] SEE “COURSE MATERIALS, ALL THE MARTIN BOOK CHAPTERS (PDF)”.


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

D. Additional Recommended Text(s) and Other Course Materials:

Not Applicable

E. Major Course Assignments & Examinations:

In order to complete the assignments for the class, you will need contact with an agency that will provide you information about their budget and their internal workings. Students are responsible for creating this linkage themselves and could/should use their field placement agency.
Required Discussion and On-line Participation Topics List

- See the detailed list of dates, readings, assignments, etc., below.

Exercises in Martin Book: (EPAS 2.1.3, Behavior 1; EPAS 2.1.8, Behavior 2; EPAS 2.1.9, Behaviors 1, 2; EPAS 2.1.10(c), Behavior 1; EPAS 2.1.10(d), Behavior 1) (100 Points total).
Each student is expected to complete the assignments posted on the syllabus and upload them by midnight on the due date. This work is to be completed on one’s own, not in collaboration with anyone else. No late submissions will be accepted—this will be enforced by the University Computer. “Before 5:00 p.m.” means BEFORE 5:00 p.m.. If it is already 5:00 p.m., the system will not accept the submission. Do not get into the habit of waiting until the last minute.

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

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

- They must be turned in on time, that is, BEFORE 5:00 p.m. of the date they are due.
- WHenever possible, you must use formulas in Excel to calculate the numbers, EVEN WHEN numbers are given to you in the pdf. For example, the pdf may provide a total of a column of figures for you, but you MUST use a formula to calculate it yourself. Think of this as a way to ensure that you understand how to create and use formulas in Excel. This should give you more confidence in your own work when it agrees with what is in the book.
- Another example: you MUST NOT calculate a number using your own math skills or calculator and then just insert the number in the Excel spreadsheet.
- When you save your file for uploading, be sure to use a file name something like this: YOURNAME_EXERCISE_4-2.xls. I don’t want to receive 20 files called Ex4-2!

Discussion Posts
Some weeks you are required to post answers on the discussion board. These must be completed by 5 p.m. on the assigned day. Some weeks, you are required to post an answer yourself with one due date, and ALSO post a thoughtful response to someone else’s post. This is a second graded post. It is also due by 5 p.m. of the designated day. Be sure to read the discussion question and explanation carefully to ensure you are earning all the points you can.

FINAL PAPER EPAS 2.1.1, Behavior 1; EPAS 2.1.3, Behavior 1; EPAS 2.1.4, Behavior 1; EPAS 2.1.5, Behaviors 1, 2; EPAS 2.1.9, Behaviors 1, 2; EPAS 2.1.10(a), Behavior 1; 2.1.10(b), Behavior 1; EPAS 2.1.10(c), Behavior 1; EPAS 2.1.10(d), Behavior 1 (170 points) (See grading guide later in this syllabus.) (Must use APA latest style.)

Analyzing an agency’s finances and fundraising (170 points). (Objectives 1-6). (due before 5:00 p.m. April 30.) This paper must be completed on your own. For this assignment, you need
to use a nonprofit agency (not a government body) and look at its budgeting processes and sources of revenue. After you analyze all sources of revenue, you will make recommendations for improvements. In other words, think of yourself as a highly paid consultant brought in to help the agency understand better what it is doing well and what could be improved, particularly in light of the trends in funding for the arena within which that agency operates. Use APA style in writing this paper. (Look for the point values in the grid later in the syllabus.) The outline for this paper must be followed and looks like this:

1) **Executive Summary**: 1-2 pages (maximum). Covers main topics and findings and presents the key recommendations you are making.

2) **Introduction**: 1-2 pages (maximum). Covers main topics and findings and presents the key recommendations you are making.

3) **Description of Agency**: Describe the agency according to its mission, goals/desired outcomes, responsibility centers (describe each one and what type of center it is). Include an organizational chart.

4) **Cost Analysis Basics**: Describe fully at least one client outcome and define at least one unit of service that can be used for cost analysis purposes. Develop an estimate of the cost per outcome and cost per unit of service.

5) **How Agency is Currently Raising Funds and How this has Changed in the Past 3 Years**: Describe the major sources of the agency’s funding for the most recent completed fiscal year. What were its main sources (grants, donations, special events, social enterprise, etc.)? Analyze how this most recent year compares to fundraising practices for the past 2-3 years. What changes do you see?

6) **Calculation and Analysis of Financial Ratios**: Provide financial ratios (as described in the Martin text) for 3 recent years. Analyze what you see in these ratios—where are the organization’s strong points? Are there any red flags to raise an alarm about?

7) **Forecasting**: You use correct techniques in forecasting at least two things that could be of use to the agency, such as number of clients next year or revenue from special events. Explain your prediction well enough that anyone in your agency could understand how you arrived at your forecast.

8) **Predictions of Funding Environment for Next Five Years for Your Agency**: You predict what the funding trends are going to be for agencies like yours. General trends are “personalized” to this particular agency. Ensure you look at how your agency could raise funds from internet based sources, different population groups (such as women, ethnic or racial groups, different age groups, and other niche populations). Look at all the readings in the last half of the course for ideas what to look at. This is usually the weakest section for students as it takes a lot of work to look at trends in all the areas—not just what you’ve done with financial ratios—this section wants you to look at the big pictures of what’s happening in your policy and practice area.

9) **Recommendations for Improving Current Practices**: You provide and fully explain at least 3 recommendations for improving the current practices of the agency. Your recommendations are reasonable and feasible.

10) **Conclusion**: Your conclusion summarizes key points and brings the paper to a nice close.

11) **Details** of writing, grammar, spelling, APA etc. are correct.
LATE WORK is allowed ONLY for this final paper and it carries a 50 point penalty per day. (If you have a valid medical or other pre-approved reasons talk to me **before** the deadline.)

REFLECTIONS PAPER (20 Points Due May 4 before 5:00 p.m.): This is a 2-3 page paper where you reflect on what went well this semester with the class, what could be improved, and, mostly, what you learned and how you think you will use it in the future.

F. Grading Policy:

All papers must be grammatically correct using APA style. Papers with many grammatical errors and misspellings will not receive a satisfactory grade.

Points will be given for each assignment, with a total of 300 points possible. Your final grade will be determined very strictly according to the following scale:

<table>
<thead>
<tr>
<th>Final Grade</th>
<th>Percent</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>90.0% and up</td>
<td>270 — 300 points</td>
</tr>
<tr>
<td>B</td>
<td>80.0% to 89.99%</td>
<td>240 — 269 points</td>
</tr>
<tr>
<td>C</td>
<td>70.0% to 79.99%</td>
<td>210 — 239 points</td>
</tr>
<tr>
<td>D</td>
<td>60.0% to 69.99%</td>
<td>180 — 209 points</td>
</tr>
<tr>
<td>F</td>
<td>less than 60.0%</td>
<td>179 or fewer points</td>
</tr>
</tbody>
</table>

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

G. Make-Up Exam or Assignment Policy:

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

H. Attendance Policy:

At The University of Texas at Arlington, taking attendance is not required. Rather, each faculty member is free to develop his or her own methods of evaluating students’ academic performance, which includes establishing course-specific policies on attendance. For this course, here is the attendance policy:

This is an online course so there is no attendance required. You are required, however, to log into the class Blackboard shell no less than twice per week to complete assignments, discussion postings (placing your own and/or reading others), check for changes to the schedule, etc.

I. Course Schedule:
As the instructor for this course, I reserve the right to adjust this schedule in any way that serves the educational needs of the students enrolled in this course. Should technical problems arise with course delivery, alternate but equivalent assignments may be given so long as the overall learning objectives, general time frame and grading structure for the course are sustained.

- All weeks begin on Tuesday; thus
- All weeks end on Monday.
- Check carefully what date assignments are due, as they are not always on the same day of the week. All assignments are due before 5 p.m. of whatever day they are due. Please note that I do not usually respond to emails after 5 p.m. or much on the weekend.
- Follow the information on what to read and watch under the course materials part of Blackboard. If something is provided for a particular week, read or watch it. Major assignments are posted there as well. Required discussion posts are shown in the discussion area.

<table>
<thead>
<tr>
<th>Week</th>
<th>Dates</th>
<th>Topics</th>
<th>Material to Consume</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Jan. 16-22</td>
<td>Introduction to Course and Budgeting</td>
<td>Everything in course content folder plus Martin Ch. 1; Do discussion post (5 pts.). Attempt “prove it” assignment (15 pts.).</td>
</tr>
<tr>
<td>3</td>
<td>Jan. 30-Feb. 5</td>
<td>Program Structures Performance Measures and Evaluation</td>
<td>Everything in course content folder. Martin Ch. 2. Do Discussion post (15 pts.). Attempt “prove it” assignment if not already done.</td>
</tr>
<tr>
<td>4</td>
<td>Feb. 6-12</td>
<td>Budgeting and Budgeting Systems Cost-Analysis</td>
<td>Everything in course content folder. Martin Ch. 7 and 8. Do Exercise 8.3 (10 pts.). Attempt “prove it” assignment if not already done. You may not submit any Martin exercise until Prove it assignment is completed.</td>
</tr>
<tr>
<td>5</td>
<td>Feb. 13-19</td>
<td>Financial Analysis Ratios</td>
<td>Everything in course content folder. Martin Ch. 5. Do Ratios Assignment (10 pts.). Attempt “prove it” assignment if not already done. You may not submit any Martin exercise until Prove it assignment is completed.</td>
</tr>
<tr>
<td>6</td>
<td>Feb. 20-26</td>
<td>Basics of Accounting Understanding Financial Statements</td>
<td>Everything in course content folder. Martin Ch. 3 and 4. Take test (10 pts.). Attempt “prove it” assignment if not already done. You may not submit any Martin exercise until Prove it assignment is completed.</td>
</tr>
<tr>
<td>7</td>
<td>Feb. 27-Mar. 5</td>
<td>Forecasting</td>
<td>Everything in course content folder. Martin Ch. 9. Do Exercise 9.3 (10 pts.). Attempt “prove it” assignment if not already done. You may not submit any Martin exercise until Prove it assignment is completed.</td>
</tr>
<tr>
<td>Week</td>
<td>Assignment</td>
<td>Points</td>
<td>When Due</td>
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</tr>
<tr>
<td>1</td>
<td>Introduction</td>
<td>5</td>
<td>Jan. 22</td>
</tr>
<tr>
<td>1</td>
<td>Prove you can do Excel</td>
<td>15</td>
<td>Feb. 5</td>
</tr>
<tr>
<td>2</td>
<td>Am I a fundraiser</td>
<td>5</td>
<td>Jan. 26</td>
</tr>
<tr>
<td>2</td>
<td>Response</td>
<td>5</td>
<td>Jan. 29</td>
</tr>
<tr>
<td>3</td>
<td>Business Models and Nonprofits</td>
<td>15</td>
<td>Feb. 5</td>
</tr>
<tr>
<td></td>
<td>Remember “Prove You can Do Excel” assignment Due Feb. 6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Martin 8.1</td>
<td>10</td>
<td>Feb. 12</td>
</tr>
<tr>
<td>5</td>
<td>Financial Analysis Ratios</td>
<td>10</td>
<td>Feb. 19</td>
</tr>
<tr>
<td>6</td>
<td>Accounting Basics Test</td>
<td>10</td>
<td>Feb. 26</td>
</tr>
<tr>
<td>7</td>
<td>Forecasting Martin 9.3</td>
<td>10</td>
<td>Mar. 5</td>
</tr>
<tr>
<td>8</td>
<td>Martin 10.1</td>
<td>10</td>
<td>Mar. 19</td>
</tr>
</tbody>
</table>
Note: Grades will be posted to the campus MyMav system at course completion and made available on the University Schedule for posting of grades. Grades cannot be given by email or individually by the instructor, per University Policy.

J. Expectations for Out-of-Class Study:

Beyond the time required to attend each class meeting, students enrolled in this course should expect to spend at least an additional three hours (for each hour of class or lecture per week) of their own time in course-related activities, including reading required materials, completing assignments, preparing for assignments and exams, and reviewing online content, etc.

K. Grade Grievance Policy:

See BSW/MSW Program Manual.

L. Student Support Services:

UT Arlington provides a variety of resources and programs designed to help students develop academic skills, deal with personal situations, and better understand concepts and information related to their courses. Resources include tutoring, major-based learning centers, developmental education, advising and mentoring, personal counseling, and federally funded programs. For individualized referrals, students may visit or contact Ms. Jennifer Malone, Coordinator of the Office of Student Success and Academic Advising located on the third floor of Building a of the School of Social Work Complex. Dr. Chris Kilgore serves as a writing coach and resource as well and has posted an online writing clinic. Also, the Maverick Resource Hotline may be contacted at 817-272-6107, or send a message to resources@uta.edu, or view the information at www.uta.edu/resources.

M. Librarian to Contact:
The Social Sciences/Social Work Resource Librarian is John Dillard. His office is in the campus Central Library. He may also be contacted via E-mail: dillard@uta.edu or by Cell phone: (817) 675-8962, below are some commonly used resources needed by students in online or technology supported courses:

http://www.uta.edu/library/services/distance.php

The following is a list, with links, of commonly used library resources:
Library Home Page.....................http://www.uta.edu/library
Subject Guides .........................http://libguides.uta.edu
Subject Librarians ....................http://www-test.uta.edu/library/help/subject-librarians.php
Database List .........................http://www-test.uta.edu/library/databases/index.php
Course Reserves .......................http://pulse.uta.edu/vwebv/enterCourseReserve.do
Library Catalog ......................http://discover.uta.edu/
E-Journals ............................http://utalink.uta.edu:9003/UTAlink/az
Connecting from Off- Campus ....http://libguides.uta.edu/offcampus
Ask a Librarian ........................http://ask.uta.edu

N. Emergency Exit Procedures:

This is an online class so this section does not apply.

O. Drop Policy:

Students may drop or swap (adding and dropping a class concurrently) classes through self-service in MyMav from the beginning of the registration period through the late registration period. After the late registration period, students must see their academic advisor to drop a class or withdraw. Undeclared students must see an advisor in the University Advising Center. Drops can continue through a point two-thirds of the way through the term or session. It is the student's responsibility to officially withdraw if they do not plan to attend after registering. Students will not be automatically dropped for non-attendance. Repayment of certain types of financial aid administered through the University may be required as the result of dropping classes or withdrawing. For more information, contact the Office of Financial Aid and Scholarships (http://wweb.uta.edu/aao/fao/).

P. Americans with Disabilities Act:

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

Q. Title IX:

The University of Texas at Arlington is committed to upholding U.S. Federal Law “Title IX” such that no member of the UT Arlington community shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity. For more information, visit www.uta.edu/titleIX.

R. Academic Integrity:

Students enrolled all UT Arlington courses are expected to adhere to the UT Arlington Honor Code:

\[
I \text{ pledge, on my honor, to uphold UT Arlington’s tradition of academic integrity, a tradition that values hard work and honest effort in the pursuit of academic excellence. I promise that I will submit only work that I personally create or contribute to group collaborations, and I will appropriately reference any work from other sources. I will follow the highest standards of integrity and uphold the spirit of the Honor Code.}
\]

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

S. Electronic Communication:

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

T. Student Feedback Survey:

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

U. Final Review Week:

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

V. School of Social Work - Definition of Evidence-Informed Practice:

Evidence-informed practice (EIP) is a guiding principal for the UTA-SSW. This approach is guided by the philosophy espoused by Gambrill (2006) and others who discuss evidence-based practice (EBP). Though many definitions of EIP/EBP saturate the literature, we offer two definitions that most closely define our understanding of the concept and serve to explicate our vision of EIP for the UTA-SSW:

The use of the best available scientific knowledge derived from randomized, controlled outcome studies, and meta-analyses of existing outcome studies, as one basis for guiding professional interventions and effective therapies, combined with professional ethical standards, clinical judgment, and practice wisdom (Barker, 2003, p. 149). ...the integration of the best research evidence with our clinical expertise and our patient’s unique values and circumstances (Strauss, et al., 2005).

The University of Texas at Arlington School of Social Work vision statement states that the “School’s vision is to promote social and economic justice in a diverse Environment.” Empowerment connects with the vision statement because, as Rees (1991) has pointed out, the very objective of empowerment is social justice. Empowerment is a seminal vehicle by which social justice can be realized. It could well be argued that true social justice cannot be realized without empowerment. Empowerment, anchored with a generalist base, directs social workers to address root causes at all levels and in all contexts, not simply “symptoms”. This is not a static process but an ongoing, dynamic process, a process leading to a greater degree of social justice and equality.

University of Texas at Arlington-School of Social Work: Definition of Empowerment
Empowerment is defined by Barker (2003:142) as follows: In social work practice, the process of helping individuals, families, groups, and communities increase their personal, interpersonal, socioeconomic, and political strength and develop influence toward improving their circumstances.

Note: Please also consider conserving paper by formatting and two-sided printing of syllabi with ½ inch margins. Please help our fragile environment by recycling all paper when finished, as well as plastic bottles, cans, etc., in the many recycling stations available in the Social Work Complex. Thank you.
Student Name: __________________________________________________________

<table>
<thead>
<tr>
<th>Grading for the Final Paper</th>
<th>Possible Points</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Executive Summary.</strong> 1-2 pages (maximum). Covers main topics and findings and presents the key recommendations you are making</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Introduction</strong> Tells the purpose of the paper, provides an overview</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Description of Agency.</strong> Describe the agency according to its mission, goals/desired outcomes, responsibility centers (describe each one and what type of center it is). Include an organizational chart.</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td><strong>Cost Analysis Basics.</strong> Describe at least one client outcome and define at least one unit of service that can be used for cost analysis purposes. Develop an estimate of the cost per outcome and cost per unit of service.</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>How Agency is Currently Raising Funds and How this has Changed in the Past 3 Years.</strong> Describe the sources of the agency’s funding for the most recent completed fiscal year. What were its main sources (grants, donations, special events, etc.)? Analyze how this most recent year compares to fundraising practices for the past 2-3 years. What changes do you see?</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td><strong>Calculation and Analysis of Financial Ratios.</strong> Provide financial ratios (as described in the Martin text) for 3 recent years. Analyze the trends you see in these ratios—where are the strong points and are there any red flags to raise an alarm about?</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td><strong>Forecasting.</strong> You use correct techniques in forecasting at least two things that could be of use to the agency, such as number of clients next year or revenue from special events. Explain your prediction well enough that anyone in your agency could understand how you arrived at your forecast.</td>
<td>10</td>
<td></td>
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<tr>
<td><strong>Predictions of Funding Environment for Next Five Years for Your Agency.</strong> You predict what the funding trends are going to be for agencies like yours. General trends are “personalized” to this particular agency. Ensure you look at how your agency could raise funds from internet based sources, different population groups (such as women, ethnic or racial groups, different age groups, and other niche populations).</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td><strong>Recommendations for Improving Current Practices.</strong> You provide and fully explain at least 3 recommendations for improving the current practices of the agency. Your recommendations are reasonable and feasible.</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td><strong>Conclusion.</strong> Your conclusion summarizes key points and brings the paper to a nice close.</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td><strong>Details of writing, grammar, spelling. APA etc. are correct</strong></td>
<td>20</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>170</strong></td>
<td></td>
</tr>
</tbody>
</table>

Comments
Required Competencies in Microsoft Excel

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

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