

Macro & Administrative Skill-building Activities by Organizational Functional Areas & Social Work Competency

*A PRACTICUM RESOURCE FOR SOCIAL WORK STUDENTS &
PROGRAMS*

JENIFER GAMBLE, PHD, MSSW; UNIVERSITY OF KENTUCKY, COLLEGE OF SOCIAL
WORK

Macro & Administrative Skill -building Activities by SW Competency Area & Organizational Functional Areas

The following items have been developed for social work students engaging in practicums, with macro and administrative skill-building in mind. Skill-building activities are written in an adaptable manner, and items should be developed into SMART activities that are Specific, Measurable, Achievable, Relevant, and Time-bound. Items should be used to inspire unique and meaningful learning goals and activities specific to the organization, mission and student interests. Items are organized by functional areas and social work competencies and numbered for ease of reference.

Macro & Administrative Skill -building Activities by SW Competency Area & Organizational Functional Areas

Functional Area: GOVERNANCE

The Board of Directors (BOD) oversees the strategic direction of the org and its governing processes and procedures.

SW Competency	Skill-building Practicum Activities
I. ETHICS	<ol style="list-style-type: none">1. Review board bylaws2. Review state-level SW regulatory standards and licensing board3. Identify and review 2 articles on board ethics violations4. Examine Board of Directors (BOD) conflict of interest and disclosure forms and processes
II. ADVANCE JUSTICE	<ol style="list-style-type: none">5. Examine mission and policy engagement opportunities with BOD6. Review BOD manual. If there isn't one, create it.7. Review BOD orientation materials relating to org mission and advancing justice
III. ADEI IN PRACTICE	<ol style="list-style-type: none">8. Investigate BOD audits and approaches for BOD evaluation9. Review audit tools. If there aren't any, create them.10. Conduct a BOD audit re: talent, gender, race, ethnicity, etc.

Macro & Administrative Skill -building Activities by SW Competency Area & Organizational Functional Areas

IV. RESEARCH	<ul style="list-style-type: none"> 11. Research BOD best practices 12. Review BOD role and characteristics in relation to organizational lifecycle 13. Identify and review 2-3 evidence-based resources around BOD best practices 14. Subscribe to online BOD expert network for up-to-date news and events
V. POLICY PRACTICE	<ul style="list-style-type: none"> 15. Develop issue briefs for BOD 16. Develop BOD strategy for issue advocacy 17. Review org policy on reporting abuse, discrimination and unfair treatment 18. Review org's Directors & Officers' insurance policy
VI. ENGAGE	<ul style="list-style-type: none"> 19. Attend BOD meetings and committee dialogue 20. Interview with BOD members re: role and motivation 21. Attend/network with accrediting body meetings and outreach opportunities
VII. ASSESS	<ul style="list-style-type: none"> 22. Develop BOD survey 23. Identify support gaps within BOD giving/service 24. Conduct prospect research within community for board members
VIII. INTERVENE	<ul style="list-style-type: none"> 25. Develop and deliver BOD information session on current topic 26. Engage in BOD committee work 27. Implement BOD data collection and survey deployment
IX. EVALUATE	<ul style="list-style-type: none"> 28. Review strategic plan performance benchmarks and progress 29. Examine financial support trends within BOD led efforts 30. Review meeting minutes and cross reference BOD and/or agency goals

Macro & Administrative Skill -building Activities by SW Competency Area & Organizational Functional Areas

Functional Area: EXECUTIVE DIRECTOR /CEO & ORG LEADERSHIP

The Executive Director reports to the BOD and oversees the operations of the org, manages HR and finance, provides linkage to the community, and makes day-to-day org decisions.

I. ETHICS	<ol style="list-style-type: none"> 1. Interview ED 2. Review ED job description for ethical responsibilities and role challenges 3. Investigate ethical violations of leaders in community 4. Review the conflict of interest and dual relationship policies pertaining to leadership
II. ADVANCE JUSTICE	<ol style="list-style-type: none"> 5. Examine org partnerships and memberships with advocacy orgs 6. Explore advocacy efforts that may be opportunities but are unfamiliar 7. Conduct leadership interviews with justice lens and framing 8. Identify/review/join groups leading community impact efforts
III. ADEI IN PRACTICE	<ol style="list-style-type: none"> 9. Identify and examine interprofessional learning, professional development, and staff success efforts with an equity lens 10. Explore equity strategies that may be appropriate for org and leadership structure 11. Identify and review 2-3 evidence-based resources on improving representation and supporting underrepresented groups in the non-profit sector
IV. RESEARCH	<ol style="list-style-type: none"> 12. Explore the leadership strategies and approaches utilized in org with leadership team members 13. Research and review the leadership types and strategies discussed 14. Identify and review 2-3 evidence-based reports on leadership types, styles, approaches, and/or theories.
V. POLICY PRACTICE	<ol style="list-style-type: none"> 15. Develop social media posts for org leadership around issue advocacy 16. Explore issue area and develop brief /report

**Macro & Administrative Skill -building Activities by
SW Competency Area & Organizational Functional Areas**

	17. Present issue brief/report to team and disseminate appropriately.
VI. ENGAGE	18. Review of strategic plans and processes 19. Attend community events with org leadership 20. Review leadership profiles of those in like organizations at local, state and regional levels 21. Review org chart in relation to funding distributions
VII. ASSESS	22. Examine professional development opportunities available to leadership and different career requirements 23. Explore function of associations within issue, org type, etc. and role in quality 24. Develop a Survey tool for specific work groups and projects
VIII. INTERVENE	25. Develop materials, briefs, and tools for a project 26. Conduct a workshop, training or information session 27. Attend an event and represent the org 28. Assist leadership on a project
IX. EVALUATE	29. Review leadership performance review process by BOD 30. Research best practices in evaluating leadership

Functional Area: FINANCING, FUND DEVELOPMENT & GRANT WRITING

Resource development, including grants, donors and partnerships, and the org's financial management.

Macro & Administrative Skill -building Activities by SW Competency Area & Organizational Functional Areas

I. ETHICS	<ol style="list-style-type: none"> 1. Review of past 3 years of org financial audits, 990's and budget reports 2. Review ethics and regulations regarding social enterprise models 3. Review donor and fundraising ethics 4. Examine fundraising policies and practices for ethical compliance with NASW/ASWB/CSWE Technology standards
II. ADVANCE JUSTICE	<ol style="list-style-type: none"> 5. Review of corporate and major donor profiles for mission alignment 6. Review funding allocations to programs 7. Review current grants and project materials with just lens 8. Review development strategy through critical and just lens.
III. ADEI IN PRACTICE	<ol style="list-style-type: none"> 9. Explore the backgrounds of 2-3 major funders or donors 10. Develop a case study or impact summary of their role in org's mission 11. Research approaches for broad resource engagement 12. Develop a funding campaign supporting a specific group or community.
IV. RESEARCH	<ol style="list-style-type: none"> 13. Subscribe to non-profit association or collaborative for news, events and up-to-date research 14. Identify and read 2-3 reports on successful fundraising strategies 15. Research proposal writing basics and use AI to help develop outlines and templates
V. POLICY PRACTICE	<ol style="list-style-type: none"> 16. Research state fundraising laws and regulations 17. Research Federal funding vehicles and mechanisms for issue 18. Review org's development and fundraising policies and procedures. If there aren't any, create them.
VI. ENGAGE	<ol style="list-style-type: none"> 19. Attend network events 20. Conduct landscape funding landscape research 21. Subscribe to donor network communications

**Macro & Administrative Skill -building Activities by
SW Competency Area & Organizational Functional Areas**

	<ul style="list-style-type: none"> 22. Explore the communities of practice involved in your issue 23. Explore social enterprise orgs supporting same mission 24. Explore new funding opportunities and tax credits and incentives
VII. ASSESS	<ul style="list-style-type: none"> 25. Examine org's funding distribution and program allocations 26. Review donor strategy for gaps in group engagement, requests, acknowledgement, etc. 27. Examine donor landscape for overall trends in giving 28. Compare success of different program support strategies and proposal success 29. Assess communication rates within donor groups and tools 30. Compare project timelines and results using grant agreements and financial reports 31. Assess org sustainability based on budget and revenue reviews
VIII. INTERVENE	<ul style="list-style-type: none"> 32. Develop and execute a donor or fundraising campaign 33. Develop proposal content and materials 34. Conduct issue research for proposal development 35. Develop recommendations for expanding donor reach
IX. EVALUATE	<ul style="list-style-type: none"> 36. Review org audits 37. Analyze org budgets, revenue forecasts and spending plans 38. Observe a budget committee meeting 39. Review grant budgets and expenditures for mission alignment

OPERATIONS, ADMINISTRATIVE SYSTEMS & TECHNOLOGY

The people, processes and equipment used by the org for operations and facilities.

Macro & Administrative Skill -building Activities by SW Competency Area & Organizational Functional Areas

I. ETHICS	<ol style="list-style-type: none"> 1. Examine data collection, access and client record management policies for ethical compliance with NASW/ASWB/CSWE Technology standards 2. Review and get familiar with main organizational digital structures and systems 3. Review org standards around technology use, roles and privileges 4. Examine digital access policies and procedures. If there aren't any, create them.
II. ADVANCE JUSTICE	<ol style="list-style-type: none"> 5. Explore environmental impacts of org systems and processes 6. Examine green energy efforts and propose new tactics for improved efficiency 7. Review technology utilization and identify areas for training and broader uptake
III. ADEI IN PRACTICE	<ol style="list-style-type: none"> 8. Examine accessibility within organizational systems for individuals with disabilities and different needs 9. Review policies around facility and system access for inclusiveness 10. Examine generational system use and opportunities for enhanced training between intergenerational staff 11. Explore and review emergency weather alert and community safety procedures for inclusivity and disability access
IV. RESEARCH	<ol style="list-style-type: none"> 12. Research staff training models and needs for efficiency and effectiveness in technology utilization 13. Research internal system needs and gaps for improved project management, data collection, communication and accountability 14. Identify and share new research on interoperability and system integration for human services 15. Investigate regulatory standards for facilities (OSHA, etc.) and review recent reports, compliance scores, and certifications
V. POLICY PRACTICE	<ol style="list-style-type: none"> 16. Review technology policies and provide recommendations for areas of need 17. Explore promising practices and ethical AI use in org systems and delivery models 18. Review and examine facility standards and service contracts for potential improvements and alignment with mission

**Macro & Administrative Skill -building Activities by
SW Competency Area & Organizational Functional Areas**

<p>VI. ENGAGE</p>	<p>19. Review operations procedure manual. If there isn't one, create it.</p> <p>20. Interview staff about operational procedures and identify areas of improvement</p> <p>21. Examine interoperability of data and client management systems for gaps and areas of improvement</p> <p>22. Review and monitor technology and database platforms for user trends, case file access, and data improvement opportunities</p> <p>23. Review tech platforms within agency and develop a cheat sheet for new employee training</p> <p>24. Conduct listening sessions with staff around safety concerns, especially related to injuries and incidents caused by client violence</p>
<p>VII. ASSESS</p>	<p>25. Evaluate technology training processes and resources for new and existing staff</p> <p>26. Develop training materials for new enhancements and functionality</p> <p>27. Review and examine contract procurement processes for org partners and contractors</p> <p>28. Attend leadership and/or staff meetings around operations and internal systems</p> <p>29. Review of workplace incidents involving client violence toward staff</p>
<p>VIII. INTERVENE</p>	<p>30. Participate and support org and operational improvement projects</p> <p>31. Assist in technology feature or system implementation process</p> <p>32. Assist in new procedure roll-out training sessions</p> <p>33. Develop materials and guides for new process and procedural trainings</p> <p>34. Research and develop processes for staff support involving injuries caused by client violence toward staff</p>
<p>IX. EVALUATE</p>	<p>35. Evaluate safety codes and emergency procedures</p> <p>36. Review org insurance coverage and identify areas of limited coverage</p> <p>37. Evaluate org policies on workplace compensation and injuries caused by client assault/incidents</p>

PRODUCTS, PROGRAMS & SERVICES

The activities and services provided to the community to reach its target population/issue.

Macro & Administrative Skill -building Activities by SW Competency Area & Organizational Functional Areas

I. ETHICS	<ol style="list-style-type: none"> 1. Review accrediting bodies for org service types 2. Review professional standards that apply to org services and programs 3. Examine org history of ethics violations within program services 4. Review program operations manual for areas of ethical clarity and potential improvements
II. ADVANCE JUSTICE	<ol style="list-style-type: none"> 5. Examine a specific program for just practice impacts and areas for improvement 6. Explore community landscape of individuals and entities for potential partnerships that would support just collaborations and new services 7. Research new program models demonstrating effectiveness in serving client population and share with teams
III. ADEI IN PRACTICE	<ol style="list-style-type: none"> 8. Collect data and develop case studies highlighting ADEI impact from service models and programs 9. Share and present case studies and findings with org leadership 10. Examine outcome reporting processes relating to ADEI efforts 11. Host collaborative dialogue among community partners aiming toward improved ADEI efforts and programs
IV. RESEARCH	<ol style="list-style-type: none"> 12. Research program model best and promising practices 13. Explore social impact organizations focused on similar population or service areas and their service approach and challenges 14. Review recent findings and data around advocacy efforts at Federal, state and local levels for issue area 15. Review recent findings and data around services impact at Federal, state and local levels for population needs
V. POLICY PRACTICE	<ol style="list-style-type: none"> 16. Develop client services issue briefs for advocacy efforts 17. Attend and support events encouraging client testimonials and org advocacy 18. Participate in advocacy efforts aimed at improving professional standards, compensation and benefits 19. Examine org strategy for policy engagement at Federal, state and local levels for program and issue awareness. If one doesn't exist, help create one.

**Macro & Administrative Skill -building Activities by
SW Competency Area & Organizational Functional Areas**

VI. ENGAGE	<ul style="list-style-type: none"> 20. Attend consortium and networking events aimed at service population and community providers 21. Interview program staff and explore their motivations and challenges 22. Review and update resource guides for client and program services 23. Review service delivery model characteristics and observe them in action
VII. ASSESS	<ul style="list-style-type: none"> 24. Analyze program evaluation data over 2-3 years of activity 25. Examine service reporting processes and identify areas for process improvements 26. Examine Federal, state and local relationships and connections for program allies and support 27. Review program outcome/logic model and highlight high and low performance areas
VIII. INTERVENE	<ul style="list-style-type: none"> 28. Develop new/improved service area concept 29. Develop and provide materials for program engagement and service access 30. Facilitate a team meeting 31. Present research findings to team, leadership, etc. 32. Launch an awareness campaign around access for new or changed program services
IX. EVALUATE	<ul style="list-style-type: none"> 33. Review all grant reports and requirements 34. Develop improved outcome reporting materials 35. Develop and share year-over-year service metrics 36. Compare effectiveness of within agency program services 37. Examine cost effectiveness of specific program offerings

HUMAN RESOURCES, STAFFING & VOLUNTEERS

The paid and unpaid people in the org and the internal processes supporting them.

I. ETHICS	<ul style="list-style-type: none"> 1. Examine volunteer policies and procedures for ethical clarity and areas of vulnerability
------------------	---

Macro & Administrative Skill -building Activities by SW Competency Area & Organizational Functional Areas

	<ul style="list-style-type: none"> 2. Review any reported ethics violations and reporting process for potential violations 3. Conduct a Code of ethics training for staff and volunteers
II. ADVANCE JUSTICE	<ul style="list-style-type: none"> 4. Review org demographics in comparison to service population 5. Review fair and just compensation processes within agency hiring and promotion process 6. Examine HR policies for responsiveness and social justice engagement
III. ADEI IN PRACTICE	<ul style="list-style-type: none"> 7. Examine opportunities for staff and volunteer recruitment from service beneficiaries 8. Develop intergenerational training and mentoring programs 9. Explore staff professional development offerings and make recommendations for enhanced and improved opportunities 10. Attend and complete online certification around culturally responsive hiring and accountability 11. Examine social impact opportunities around talent engagement
IV. RESEARCH	<ul style="list-style-type: none"> 12. Review staff and workplace satisfaction surveys and efforts 13. Analyze volunteer engagement data for improvement opportunities and engagement gaps 14. Identify and review 2-3 articles around evidence-based models for expanded volunteer engagement and best practice 15. Identify and review 2-3 articles around social impact models for new staff recruitment 16. Research successful models and metrics for performance appraisal approaches
V. POLICY PRACTICE	<ul style="list-style-type: none"> 17. Review fair work standards at state and local levels 18. Review and evaluate compensation policies and year-over-year trends 19. Review recruitment and hiring process regulations at Federal, state and local levels 20. Conduct analysis of proposed hiring, employment and benefit policies at Federal, state and local levels
VI. ENGAGE	<ul style="list-style-type: none"> 21. Observe volunteer training process and provide recommendations 22. Review volunteer and staff orientation materials. If they don't exist, help create them 23. Explore volunteer recruitment strategy

**Macro & Administrative Skill -building Activities by
SW Competency Area & Organizational Functional Areas**

	<p>24. Interview volunteers and staff for workplace and mission satisfaction</p> <p>25. Explore potential community partnerships for expanding staff and volunteer self-care opportunities</p>
VII. ASSESS	<p>26. Examine staff and/or workplace satisfaction evaluation process</p> <p>27. Examine performance appraisal process and provide recommendations for improvement</p> <p>28. Evaluate staff and volunteer self-care offerings and benefits</p> <p>29. Analyze volunteer impact metrics and develop “storytelling” approach and framing for sharing</p> <p>30. Assess volunteer recruitment, feedback, and satisfaction process for areas for improvement, cultural competence, and social impact</p>
VIII. INTERVENE	<p>31. Participate in staff training and orientation efforts</p> <p>32. Develop staff training materials</p> <p>33. develop and participate in self-care events</p> <p>34. Join in partnership and community events</p> <p>35. Present materials and research to staff and leadership</p>
IX. EVALUATE	<p>36. Examine volunteer impact and develop an infographic</p> <p>37. Review staff performance trends</p> <p>38. Conduct overall staff and volunteer retention and turnover review</p> <p>39. Examine internship processes and feedback</p> <p>40. Develop internship services summary report</p>

Macro & Administrative Skill -building Activities by SW Competency Area & Organizational Functional Areas

MARKETING & COMMUNICATIONS

The image, branding, messaging and information efforts taken on by the org to share its work.

I. ETHICS	<ol style="list-style-type: none"> 1. Examine social media and online engagement policies and practices for ethical compliance with NASW/ASWB/CSWE Technology standards 2. Review online photo and release information form, policy and procedure. If there isn't one, create it. 3. Review Charity Navigator and Guidestar profiles for up-to-date information and overall review for accuracy
II. ADVANCE JUSTICE	<ol style="list-style-type: none"> 4. Examine activity and engage in online advocacy and education efforts 5. Review agency affiliations and support partner events and material support for just advocacy efforts 6. Analyze communication and education efforts for issue area connections and representation 7. Highlight program outcomes that support just initiatives and progressive efforts 8. Develop communication materials that connect org mission and successes to Sustainable Development Goals and Social Work Grand Challenges
III. ADEI IN PRACTICE	<ol style="list-style-type: none"> 9. Collect client stories and utilize storytelling and oral traditions for dissemination 10. Feature impact stories aiming to reach underserved groups and communities 11. Examine client recruitment and engagement strategies for reaching underserved groups and communities 12. Convert reporting data for underserved groups and communities into infographic
IV. RESEARCH	<ol style="list-style-type: none"> 13. Evaluate public access to program effectiveness evidence and annual reporting data 14. Review and develop trend report for social media and online engagement rates by audience

Macro & Administrative Skill -building Activities by SW Competency Area & Organizational Functional Areas

	15. Review 2-3 evidence-based studies centering on non-profit communications and digital strategies for education, fundraising and advocacy
V. POLICY PRACTICE	16. Participating in and support legislative engagement campaign 17. Examine legislative efforts and develop issue brief for org audience 18. Develop education materials for org newsletter relating to policy issues and advocacy efforts 19. Identify issue champions and develop strategy for engagement 20. Review website and provide recommendations for increasing advocacy materials
VI. ENGAGE	21. Review online and social media audience demographics and activity trends 22. Review past 2 years of newsletters and annual reports 23. Conduct review and audit on online media pages, materials and content 24. Review org's communication style guide. If there isn't one, create it.
VII. ASSESS	25. Conduct engagement testing (A/B, timing, etc.) for social media and newsletter posts and content 26. Develop issue awareness campaign 27. Review websites and digital presence of competitors and those sharing issue and service landscape 28. Examine org website analytics for audience demographic, geolocations, and online behaviors
VIII. INTERVENE	29. Develop narrative framing around volunteer impact data 30. Create a social media campaign for volunteer recruitment 31. Develop and launch awareness month campaign 32. Develop or modify newsletter and information sharing templates
IX. EVALUATE	33. Assist in annual report and data collection and communication efforts 34. Review website for up-to-date reporting data 35. Develop boilerplate briefs and narrative content for fundraising and member communication activities 36. Analyze donor data and communication impacts

Macro & Administrative Skill -building Activities by SW Competency Area & Organizational Functional Areas

	37. Examine annual outreach efforts and trending social media content
--	---

ACTIVITY VERIFICATION

Methods:

- | |
|--|
| 1. Discuss in supervision |
| 2. Develop a report/summarize findings |
| 3. Attend an event |
| 4. Present materials |
| 5. Develop materials |

If you have ways to improve upon this resource or items you think should be included, please contact jenifer.gamble@uky.edu. Thank you!