

Business of Social Work Certificate Modules and Objectives

Intro

- Introduction to the program
- Identifying goals for participants taking certificate program
- Combining a social work background with business perspective
- Forming a business philosophy in line with social work values and ethics
- Identifying attendees' current positive and negative attitudes towards business and identifying ways to work with those perceptions
- Consideration of how the role of running a business is different from the role of being a therapist and how to successfully function in both roles

Governance and Strategic Planning

- Overview of nonprofit/business structures
- Writing a business plan, from components, marketing, financial projects, and analysis
- Developing a mission and strategic plan for your business/organization
- Building and working with board of directors
- Identifying key stakeholders and any conflict of interest issues
- Overview of 501c organization types, LLC, sole proprietor
- Identifying goals of business and future clientele

Finances

- Reading and preparing financial statements, such as a budget, balance sheet, profit and loss statement, and a cash flow statement
- Setting priorities based on financial reporting
- Finances of Human Resources
- Using and managing cash flow to keep your business/organization healthy
- Responsible use of lines of credit
- Return on investment analysis and applying the principle whenever possible to nonprofit organizations
- Working with restricted funds – tracking, reporting, etc.
- Basic accounting knowledge and skills
- Overview of tools and resources that can be used to manage finances, such as QuickBooks
- Outline of common tax situations that affect small to medium sized businesses/organizations
- Identifying types of financial records for recordkeeping for accounting, insurance, and tax purposes

Funding

- Conducting research and needs assessments to identify funds needed

- Social entrepreneurship
- Crowdsourcing
- Basics of writing a successful grant proposal and applying for grants
- Basics of fundraising
- Identifying and winning state and federal contracts
- Small business loan programs and other financing options available when traditional bank financing can't be secured
- Revenue mix (insurance vs. private pay vs. Medicaid/Medicare vs. grants... etc.)
- Working with foundations and private donors

Leadership

- Introduction to different leadership theories
- Identifying different feedback styles and tailoring feedback styles to employees
- Different leadership styles that come up with different ethnic and cultural backgrounds
- Working in a team environment
- Reviewing the differences between managers and leaders
- Introduction to different leadership theories
- Assessing and identifying leadership styles and building a staff around that style
- Leading employees by example, leading projects, creating goals, and setting expectations
- Basics of employee motivation
- Difference between leadership and supervision

HR and Cultural Competency

- HR practices
- Celebrating diversity in a team environment
- Legal issues that might come up in hiring re: diversity, gender, disability, sexual orientation
- Cultural competency basics
- Using cultural competency knowledge in your hiring and managing processes
- Incorporating work/life balance for employees
- Reconciling opposing cultural and religious beliefs
- Work differences among age groups in the workplace

Marketing Yourself and Your Business

- Identifying and marketing yourself to future clients
- Niche marketing vs. overall marketing
- Branding yourself and business/organization to set yourself apart from others in the field
- Components of a marketing plan
- Social media-based marketing and other low-budget marketing techniques, building a web presence
- Using referral sources: internal and external

- Networking and relationship building
- Working with the media and public relations
- HIPAA considerations in marketing

Billing

- Setting up rates based on cost
- What services can be billed and what services cannot
- Contracting and credentialing with insurance companies
- Insurance payouts: how long they take (from state and otherwise), using credit when waiting for a payout
- Review of different options to bill patients, including public, private insurance, and out-of-pocket
- Billing insurance
- Basics of self-pay
- State billing/accepting and being reimbursed for Medicaid
- Medicare
- Issue of ethics in using collections agencies
- Software options to handle billing

Ethics/Risk Management

- Understanding legal and other ethical issues facing social workers in businesses/organizations
- Telehealth
- Identifying and managing possible risks in your business/organization
- Role of professional liability insurance, avoiding insurance fraud
- Basics of professional malpractice
- Reviewing standards for social workers
- Review of tools to protect social workers from possible risks
- Review of confidentiality law and issues that can arise
- HIPAA Compliance
- Contract management and compliance

Negotiations

- Learning the theory and practice behind effective negotiation
- Practice skills to become an effective negotiator and develop confidence in the negotiating process
- Ethics of negotiation
- Negotiating with insurance companies, managed care contracts, self-pay, contracts, ...etc.