Service Learning Project – Marketing 100S

Marketing 100S, an introductory course, is required of all majors in the Craig School of Business and is designated as a service-learning course. Service Learning is a form of experiential learning in which students engage in community SERVICE activities directly related to the academic objectives of the course, participating actively in LEARNING the key concepts, tools, and processes of the discipline. Students apply what they are learning to enhance the operation of local non-profit organizations, also called Community Benefit Organizations (CBO's).

The Service Learning Project includes assignments and activities that make up **25% of each student's grade** in the course. Following are requirements for the project. Documents, instructions, articles, and other materials referenced are available on the Marketing Department's Service Learning website at:
http://www.fresnostate.edu/craig/depts-programs/mktg/servicelearning.html.

Project Requirements – Development of Marketing Plan

Marketing Plan: Students will work as a team to develop a Marketing Plan for a CBO. Details about what the plan will include follow.

Mid-Course Check-In: The team will submit work on the Marketing Plan part way through its development so instructors may provide feedback.

Marketing Plan Presentation: Students will present their Marketing Plan to the class at the end of the semester.

Project Requirements – Other

15 Marketing-Related Volunteer Hours: Each student will spend 15 hours performing marketing-related services for the CBO. Students and the CBO site supervisor will agree on activities and describe them in the Learning Plan.

Learning Plan: Each student will submit an agreement between themselves and the Community Benefit Organization they choose to work with, detailing how the student will spend their 15 hours of service time working with their CBO.

Individual Readings Assignment: Each individual will read two articles, review information on the Richter Center's website, and either write a review paper or take a quiz on the material.

Individual Work Log: Each student will submit a work log indicating the tasks they completed during their 15 hours of service.

Individual Work Log Attachment: Students will provide details about their volunteer hours, including its purpose and outcomes.

Reflections: Students will complete a reflections assignment describing their experiences with their CBO and their team.

Peer Evaluations and Grading: Each individual will submit a Peer Evaluation form, which may impact (negatively) individual grades students earn on the Marketing Plan and Presentation.

Team Coordinator Evaluation: Each individual will submit a Team Coordinator Evaluation form to determine how many extra credit points will be assigned to the team coordinator.

Marketing Department Survey: Students will complete an online survey at the end of the semester to provide feedback to the department about the service-learning program.

What makes a Qualified CBO?

- A qualified Community Benefit Organization (CBO) is a non-profit, school, or government organization with a mission to help those in need (e.g., the poor, new immigrants, kids in poor neighborhoods, etc.), to benefit the public via conservancy or rescue efforts, to promote the arts or culture, or to perform other charity work.

- Organizations that do not qualify are non-profits that serve only a closed community (e.g., a golf country club or homeowners association), those whose primary mission is not to serve the needy, and those whose services are not accessible to the public.

- Religious and political organizations do not generally meet the requirements for a CBO for service learning. There may be exceptions; check with your instructor.

- A list of approved organizations is provided on the Marketing Department's Service Learning Website. Check to see if the CBO you'd like to work with is on the list. If it is not, check with your instructor to be sure it will qualify.

- You may NOT choose a CBO for your service-learning project if you are already working for that CBO or are volunteering at that CBO for a different project/course.

Grading of S.L. Group Projects & Peer Evaluations

Group reports and presentations will receive a Team Grade based on the work submitted by the team. All individuals in the group will receive the Team Grade, provided they have participated fully. Student members may receive a lesser percentage of the Team Grade based on evaluations by their colleagues through the Peer Evaluation form.

A team member that doesn't take the team project seriously and fails to contribute appropriately **will receive a fraction or none** of the Team Grade. Loss of individual points will occur based on the following lack of performance:

- Consistently fails to respond to other members' e-mails
- Does not attend team meetings or is consistently late
- Attends team meetings, but doesn't prepare anything meaningful ahead of time
- Passively sits in on team meetings and lets other members work on the project
- Fails to submit quality work
- Consistently misses agreed upon deadlines
- Does not turn in assignments on a timely basis

If a team member doesn't take the project seriously, the other members can collectively decide to fire that member. To do so, the team must provide sufficient evidence **as early as possible** for the instructor's consideration. Such evidence includes documentation regarding missed meetings, unreturned calls or texts, samples of unacceptable work, etc. If a team member is fired, he or she will be given the option of doing the project alone (but will be penalized for failing to be a contributing team member with a 20% of their now-individual project grade). In addition, fired individuals will not present their project to the class, thereby losing all the presentation points.

Miscellaneous Information: Insurance Coverage

The University provides professional and general liability insurance for students enrolled in service-learning courses (SAFECLIP). Student MUST submit a signed Learning Plan and sign in at CBO each time they provide service. Please note: the University does not provide auto liability coverage for students, and students are not covered while driving to or from their chosen site. Outside of driving themselves to and from the CBO site, students are advised not to drive as part of their service-learning activities. Students are not permitted to drive a CBO-owned/leased vehicle to perform duties for the CBO without written authorization from the university risk manager.

Service Learning
Instructions for Completing the Project

Getting Started: Form a Team & Select a CBO

Form the Team:

- Team size is up to the instructor, but generally no fewer than three and no more than five students should be on one team.
- Students should agree on meeting times that work for all members outside of class, a preferred communication method (phone calls, texts, email) and a preferred document sharing process (Google Docs, Box).
- While your instructor will allow some time in class for groups to meet**, your team will need to meet regularly outside of class to be successful**.

Elect a Team Coordinator: The Team Coordinator must be willing to perform the responsibilities below and may receive up to **25 extra credit points** for performing these tasks effectively. Team coordinators should be certain they have the time available to commit to this role *and the writing and editing skills required*. Team members will evaluate their coordinator to determine the final number of extra-credit points received. Responsibilities include:

- Coordinating team meeting times and locations.
- Serving as the liaison between the CBO supervisor and the team.
- Overseeing the **editing and proofreading** of all group documents.
- Ensuring all documents are completed properly and submitted to the instructor according to due dates.

Select a Community Benefit Organization (CBO):

- Students may already be familiar with an organization they'd like to work with. Instructors may also recommend CBO's.
- Students may also meet CBO's by attending the Community Services Fair, which is usually held at the beginning of each semester. Your instructor will provide details regarding date and location.
- A list of approved organizations is provided on the Marketing Department's SL Website. If your organization is not on the list, check with your instructor to be sure it will qualify.

Meet with the CBO Supervisor: After Service Learning teams are formed and a CBO selected, team coordinators should contact the CBO supervisor and *arrange for an initial meeting*. All team members **are required to attend the initial meeting.** Team members should bring their INDIVIDUAL Learning Plan to be completed and signed by the supervisor.

NOTE: It is important that students learn as much as possible about their CBO prior to visiting their site supervisor. Review the CBO's website, publications or brochures, and the annual report. Preparing for meetings ahead of time will increase students' ability to gain information required.

Submit Individual Learning Plans: Each team member must submit a learning plan that clearly specifies the marketing-related tasks the student will perform for the required 15 hours of service. Students may not begin volunteer hours without submitting a plan signed by both the student and the CBO site supervisor.

Development of the Marketing Plan

The development of the plan is integrated with chapters from the textbook and lectures in class. Instructors will provide students with opportunities to meet in-class as a group to facilitate plan development**.** Each team member is required to spend a minimum of 15 hours developing the marketing plan. (Experience indicates students earning A's spent 22 - 25 hours each on research and writing.) Students should expect the marketing plan to be between 15 and 25 pages in length.

Key elements the marketing plan should contain are below. Details for each section are provided.

- Introduction to the CBO
- Overview of current marketing mix
- Analysis of the CBO's Revenue and Funding
- SWOT Analysis
- CBO's Key Marketing Objective(s)
- Implementation Plan: Tactics to Achieve Marketing Objective(s)
- Implementation Plan: Promotional Plan to Achieve Marketing Objective(s)
- Conclusion

Students should use the headers in BLUE CAPS to organize the plan.

INTRODUCTION

- Briefly discuss the CBO's history. Why was it founded? Who founded the organization? How has it evolved and grown?
- Explain the CBO's current mission and discuss **the impact** the organization has on the community every year (i.e., how many clients served, nights of shelter provided, pounds of food collected, etc.).

OVERVIEW of CURRENT MARKETING MIX and TARGET MARKET

- Product (Service): Explain the primary services offered by the CBO.
- Target market: Provide a description of clients or customers receiving the services (those targeted by the CBO). What specific characteristics does the target market share? Consider age, income, and geographic location of the clients. Also consider diversity in clients and how that may present challenges. (Are there different cultures and languages the CBO may need to consider? Are there characteristics of clients that make them reluctant to use the service?)
- Place (Distribution): Explain how the organization delivers (distributes) their services (i.e., how services can be accessed or obtained). Who delivers the service or serves the clients? (Explain the mix of volunteers and employees if applicable.)
- Price: Does the organization charge for services? If so, describe the how pricing works (sliding scale, flat fee, by-the-hour, membership, etc.) Does the organization sell anything? (The Goodwill, for example, sells products.)
- Promotion: Briefly discuss the organization's current promotional (advertising, social media, press relations) relative to communicating to their stakeholders (clients, prospective clients, donors, and volunteers).

NOTE: As you address each of the elements of the marketing mix, note strengths and weaknesses, which will be useful for the SWOT analysis section.

CURRENT FINANCIAL SITUATION

Explain the CBO's sources of revenue & expense for the most recent year. You may find information from annual reports or financial statements from your CBO and/ or through a website like Charity Navigator or Guidestar. All non-profits file a Form 990 with the IRS each year. These forms are required by law to be PUBLIC and are valuable in addressing the questions below. Cite your source(s) of information for each of the areas below.

- **Sources of Revenue**: Identify which of the following sources of revenue your CBO relies on and *what dollar amount the CBO receives for each category. Provide a percentage of total funding* each source represents.
  - Donations: Describe major sources of donations, both individual and corporate.
  - Fundraising: Many CBO's hold fundraisers that earn significant revenue. Describe the events and their profitability.
  - Grants / government funding: Does the CBO receive grants from local, state or federal government sources or other sources? Identify the agency or organization providing such grants and the purpose of the grants.
  - Fees for service or revenue from product sales

- **Major Sources of Expenditure:** For the most current year available, discuss where the organization spends its revenue and *what percentage of total expenses* each category represents.
    - Salaries and benefits
    - Fundraising expenses
    - Program expenses
    - Administrative expenses: A key metric for CBO's is the amount of administrative expenses incurred as a percent of total expenses. **Determine this percentage for your CBO**.

- **Volunteers as a Resource:** A key resource for many CBO's includes dedicated volunteers who provide many hours of service. Determine how many volunteers and volunteer hours your organization relies on. (The organization may have a "volunteer coordinator" who has this information readily available.) Estimate an hourly rate for the volunteers and determine about how much their time is worth in total for one year (in dollars).

SWOT ANALYSIS

Perform a SWOT analysis for your CBO based on what you've learned in the preceding sections. Include the following.

a. A four-quadrant grid to identify key elements for each area. (See your text.)
b. An analysis the key issues you discovered. (Explain what the information in the grid means.)
c. Explain how this CBO differs from other organizations providing similar services (their competition).

MARKETING OBJECTIVES

Clearly state the CBO's marketing objectives. Based on information from the CBO supervisor, identify two or three specific and important marketing objectives the CBO wishes to achieve in the next year or two. If a CBO's marketing objectives are vague or unclear, it is up to the student team to identify appropriate objectives; your instructor may be of significant help in this area.

Good examples of marketing objectives:

- Hold a specific number of fundraising events to achieve a certain dollar profit.
- Expand existing services to an underserved geographic area (specify location).
- Expand the client base to include a new segment or group of clients (i.e., clients who don't speak English).
- Develop and offer a new service (specify the service) to existing clients.
- Increase volunteer retention or increase volunteer hours by a specific amount.

Poor examples of marketing objectives:

- Increase awareness of the CBO
- Improve the CBO's social media presence
- Increase the CBO's net income
- Obtain more volunteers
- Make the website more user-friendly

When writing marketing objectives, remember a meaningful objective should:

- Identify specific groups targeted for action. To whom will we provide the service? From whom are we soliciting donations?
- Be realistic. The objectives must have a way to be implemented. The funding, staffing, or volunteer resources required must exist or the team must identify how they will be obtained.
- Be measureable and time-specific. An example of an objective that is measurable and time-bound is: *Increase the number of clients we are able to serve by 10% (50 more people) in 2019 and by 15% (75 more people) in 2020.* Note the percentage goal is explained in a quantifiable number as well.

Check-In: Students will submit the work they have completed on their project up to this point. This check-in will allow students to receive feedback from their instructor to facilitate success with the final project.

NOTE: Use 12 pt font and 1.5 spacing. Margins should be 1-inch top, bottom, right and left.

TACTICS TO ACHIEVE MARKETING OBJECTIVE – IMPLEMENTATION PLAN

Choose **one important marketing objective** from those identified and determine the steps required to achieve the objective. These steps will form an "implementation plan." This section is all about HOW you will get the objective done. Examples follow.

- **Marketing Objective:** *Increase donations by 20% ($50,000) in 2019 through increased participation / attendance in 3 existing fundraisers.*
    - Tactics to achieve this objective might include:
        - Obtain additional volunteers to assist with events.
        - Create communications to previous attendees with a special offer for early sign-up.
        - Perform research to create a list of new businesses and individuals to invite.
        - Increase silent auction items by 25% at the main fundraiser.

- **Marketing Objective:** *Establish a site from which to deliver services to clients located in Sanger and Selma.*
    - Tactics to achieve this objective might include:
        - Determine location for new services delivery (sharing office space, leasing office space).
        - Determine additional staff or volunteers required.
        - Create a sliding scale of charges for service.
        - Assess costs associated with new location and explain where funding will come from.

TACTICS TO ACHIEVE MARKETING OBJECTIVE – PROMOTIONAL PLAN

Develop the traditional media and social media plans to support the implementation plan above. Determine which communication channels (media) will be used and how frequently they will be used. The media plan MUST be appropriate to the target audience and MUST support your implementation plan above. Keep in mind the costs of each media selected. Examples:

- Many radio and TV stations provide Public Service Announcements (PSA's) and assist with the development of ads
- Free publicity in the form of articles or mentions created by press releases is cost-effective
- Direct mail to targeted zip codes / Direct email to targeted segments
- Newsletters from the organization – digital and "snail mail"
- Collateral material – brochures, flyers, posters – digital and printed
- Speakers' bureaus – many CBO's utilize volunteers to speak to service organizations like Rotary Clubs
- The organization's website – Is it easy to navigate? Can people donate online? Is it search-engine-optimized?
- Social media – what is the right combination? Remember the demographics of certain social media platforms are highly skewed to younger audiences. And any platform selected must be managed consistently
- Paid digital and traditional advertising, including search

An effective way to describe how each media will be used is suggested below. This format allows you to see the interactions and integration among the various elements of the mix; it also allows you to estimate the workload of managing the media mix.

Media	Month 1	Month 2	Month 3
Website	Re-design site to optimize search results (SEO)	Add capability to accept online donations.	Measure online donations.
Local Newspaper	Create PSA about May fundraiser using newspaper resources.	Run PSA for May fundraiser 8 times.	Print PSA 4 times Measure inquiries from ad.

CONCLUSION

Explain how you might "check for progress" to determine whether your plan is being implemented effectively and will conclude successfully. Discuss any risks you see in implementing the plan and explain how you might mitigate those risks.

Submit the Marketing Plan

The Team Coordinator is responsible for ensuring all parts are edited well and included in the proper order. Spacing should be 1.5. Margins should be 1-inch top, bottom, right and left. Use headings and sub-headings as appropriate. On each page you must provide the sources of information in a form of footnote(s). APA is the preferred citation format. Contents that should be included are all those sections described above. Plans should be 15 – 25

- Introduction
- Overview of Marketing Mix
- Current Financial Situation
- SWOT Analysis
- Identification of Marketing Objectives
- Implementation Plan: Tactics to Achieve Marketing Objective
- Implementation Plan: Promotional Plan to Achieve Marketing Objective
- Conclusion

Project Presentation

Each group will present their marketing plan to the class. Presentations should be about 10 - 12 minutes long and should cover ONLY the key points below.

- Provide a BRIEF history of the CBO and discuss their marketing mix
- Discuss *the impact the organization has* on the community every year (i.e., how many clients served, nights of shelter provided, pounds of food collected, etc.).
- Describe the size of the CBO's annual budget and explain BRIEFLY their top two or three sources of funding.
- Describe the marketing objective you chose to implement and explain why it is important. Describe briefly how it will be achieved.
- Explain what you did for your 15 hours of service to your CBO and *how you think your work benefitted your CBO*. (This part should be no more than 10 – 15% of your presentation.)

Provide your instructor a print out of your presentation in handout mode with three slides to a page the day you present. (It does not need to be in color.)

Submit Individual Work

Students are responsible for submitting the following INDIVIDUAL assignments. Your team coordinator is NOT responsible for ensuring your personal work is submitted on the dates assigned by your instructor.

- **Peer Evaluations:** Peer evaluations will be completed separately. To view the evaluation form, see the S.L. Website. Remember, student grades may be impacted (negatively) if the students fail to participate fully as evaluated by their peers.
- **Team Coordinator Evaluations:** Instructors will provide students with a team coordinator evaluation form to use in determining the amount of extra credit points an individual in that role will receive.
- **Individual Work Log:** Students will submit their work log SIGNED by their site supervisor.
- **Work Log Attachment – Discussion of Activities:** Students will submit answers to questions regarding the impact of their work and attach them to their work log.
- **Reflections Paper:** Students will answer the questions asked in the Reflections Assignment.
- **Student SL Survey:** The marketing department will provide a survey for students at the end of the semester to gauge how students feel about their experience. Your instructor will provide a link to the survey.