Marketing 100S - Service Learning

Marketing is an inspiring and dynamic field of study. Marketing 100S, an introductory course in marketing, 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 nonprofit organizations, also called Community Benefit Organizations (CBO's). Students gain relevant, hands-on learning experience and act as valuable resources to enhance the marketing activities of a CBO and improve the quality of life in the community. Marketing is an ideal business discipline for service learning since the overwhelming majority of CBO's can use assistance in this area. Service Learning assignments and activities make up 25% of each student's grade in Marketing 100S.

Following is an overview of the requirements for service learning. Documents, instructions, articles, and other materials referenced may be found on the Marketing Department's Service Learning website:

http://www.fresnostate.edu/craig/depts-programs/mktg/servicelearning.html

Service Learning Requirements – Marketing Plan

Marketing Plan: The major deliverable is the development of a marketing plan for a CBO. A well-designed marketing plan indicates how an organization's marketing objectives will be achieved through specific strategies and tactics. Students will work as a team and assume the role of a Marketing Department to create the plan and will learn and apply key marketing concepts, tools, and processes to develop the plan**.** Each team member is required to spend a minimum of 15 hours on the marketing plan aspect of service learning, about 6 of which will be done in class.

To create the plan, students will proceed through sequential steps as described in the following pages. The development of the plan is systemically integrated with chapters from the textbook. Students will engage in several one-hour Collaborative Sessions – held in class – to develop the plan**.**

Mid-Course Check-In: The team will submit their work on the Marketing Plan through Session 3 for instructor feedback.

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

Service Learning Requirements – Other

Learning Plan: Each student will submit a signed agreement (learning plan) between themselves and the Community Benefit Organization they choose to work with. The learning plan agreement is available on the service learning website. It must be completed fully, signed, and submitted to the instructor on the date specified.

Work Log for Hours Spent Developing the Marketing Plan: The team coordinator will keep a log of all team meetings and activities performed by individuals and the group to develop the marketing plan. Team members will report individual hours to their team coordinator, who will list them on the Team Work Log. The team's work log form and instructions for completion are available on the service learning website.

Marketing-Related Volunteer Hours: Students will spend 10 hours each performing marketing-related service for their CBO. Students and their CBO will agree on activities to be performed, which will be described in the Learning Plan and submitted to the instructor for approval.

Work Log for Individual Volunteer Hours: Each individual will keep a log of hours spent volunteering and submit it with the final project. The individual work log form is available on the service learning website.

Individual Readings Assignment: Each individual will read four articles as assigned by the instructor and write a review paper. The articles and instructions for this assignment are available on the service learning website.

Individual Reflections Paper: Each student will write a short paper discussing various aspects of their experiences with service learning. Instructions for this assignment are available on the service learning website.

Peer Evaluation Form: Each individual will submit a Peer Evaluation form. Peer Evaluation results may impact (negatively) individual grades students earn on the Marketing Plan and Presentation. The form is available on the service learning website.

NOTE: 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 – Step-by-Step Instructions

Step 1: Form a Team & Select a CBO

Collaborative Session 1: *Form your service learning team, elect a team coordinator, select a Community Benefit Organization, and arrange a meeting with the supervisor of the CBO (the person who will work with the team to complete the marketing plan and volunteer hours).*

Task A: Form the Team. The Service Learning Marketing Plan will be completed as a 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, etc.)

Task B: Elect a Service Learning Team Coordinator. The Team Coordinator must be willing to perform the responsibilities below. Team Coordinators will receive **25 extra credit points** for performing these tasks. Team coordinators will be evaluated by team members to determine the final number of points.

- Coordinating the team meeting times and locations.
- Serving as the liaison between the CBO supervisor and the team.
- Overseeing the proper editing and proofreading of all documents.
- Ensuring all documents are completed properly and submitted to the instructor per due dates.
- Overseeing the assembly of the Marketing Plan to ensure that <u>all</u> components are included.
- Preparing the Team Work Log. Coordinators will keep a detailed log for all meetings and work done by the group, sub-groups and individuals.

Task C: 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:
  Wednesday, January 25, from 10:00 a.m. – 1:00 p.m. at the Satellite Student Union.
- Additional resources include a list of approved organizations provided on the Marketing Department's SL Website.
  http://www.fresnostate.edu/craig/depts-programs/mktg/servicelearning.html

Task D: Arrange a Meeting with the CBO Supervisor.

After Service Learning teams are formed, team coordinators should contact the CBO supervisor and arrange for an initial meeting. This meeting should take place no later than third week of the semester. After the initial meeting with supervisor is arranged, the team coordinator should notify ALL team members, who **<u>are required to attend the initial meeting to start the project.</u>** Team members should bring their Service Learning Plan with them to the initial meeting. Each individual's Plan must be signed by the supervisor during the initial meeting and submitted before the start of collaborative Session 2.

Task E: Submit your signed, individual Learning Plan form to your instructor.

- Students may not start work on the project or begin volunteer hours without submitting the signed Service Learning Plan.
- The learning plan MUST specify what marketing-related tasks EACH student will perform for their required 10 hours of service.

Step 2: Develop the Marketing Plan

Collaborative Session 2: *Provide an organizational description of the CBO, an assessment of their current marketing situation using a SWOT Analysis, and an analysis of their financial situation and stability. The relevant information should be gathered from the company's web site**,** reading the CBO's annual report (if available), visiting the company's profile on Guidestar, and* ***during the initial meeting with supervisor of the project. Students are encouraged to learn as much as they can about the organization BEFORE visiting.*** ***(****Minimum 5 pages. Deadline determined by your instructor.)*

Task A: Overview of the organization: Provide background information and an organizational description for your CBO. Each team member should come to this session prepared by providing his/her answers to the following questions:

- Provide a brief outline of the genesis of the organization. How did it start? Why was it founded?
- Explain the CBO's mission and vision.
- Explain the organizational structure and the parties involved in decision-making. Specify number of paid staff vs. volunteers and the role of the organization's Board of Directors (if they have one). If your CBO is a "branch" of a national organization, describe the local organization.
- Explain the current product or services offered by CBO and how they are delivered or distributed.
- Provide a brief description of those who use the organization's services. (You will go into more detail about the CBO's clients / customers in the next section.)
- Explain how this CBO differs from similar organizations that provide similar services.
- Explain what kind of promotional activities the organization normally engages in what their purpose is. Attach samples of any currently used brochures or flyers.

Task B: Explain the CBO's current sources of funding and major areas of expenses. You may find information from annual reports or financial statements from your CBO and through the Guidestar website: https://www.guidestar.org/Home.aspx

- **Sources of Revenue and Funding**: Consider the following potential sources of revenue and discuss which ones your CBO relies on and *what percentage of total funding* each represents:
  - 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)?
  - Donations: Describe major sources of donations, including individual or corporate donations.
  - Fundraising: Many CBO's hold fundraisers that account for a significant amount of revenue. Describe the effectiveness (profitability) of such events.
  - Grants / government funding: Does the CBO receive grants from local, state or federal government sources? Identify the agency or organization providing such funds and the purpose for which they are granted.
- **Major areas of expenditure:** Discuss where the organization spends its revenues and *what percentage of total expenditures* each represents. Information available should allow you to determine:
  - 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.
- **Financial Trends:** Discuss overall trends in sustainability for the CBO. Is their financial picture stable, declining, growing?

Task C: SWOT Analysis (**S**trength, **W**eaknesses, **O**pportunities and **T**hreats): Perform a SWOT analysis for your CBO; for a guideline about how to perform the analysis, see Chapter 2, page 22 of the textbook. A suggested format follows:

- Use the four-quadrant grid to identify key elements for each area.
- Then, analyze the contents of your grid discussing key issues you discover using the framework.

***Collaborative Session 3**: Discuss in detail the CBO's target segments served and key stakeholders. Identify, clarify, and discuss the CBO's marketing objectives for the upcoming year.*
***(**Minimum 3 pages. Deadline determined by your instructor.)*

Task A: Describe the organization's stakeholders. Describe the important stakeholder groups your CBO needs to address and engage for the coming year. In explaining the target segment (s), consider the following:

- Clients or customers – specifically who does the organization serve?
- Donors – individual and corporate
- Volunteers –any training or other skills the CBO requires.
- If your organization requires "inputs" such as donated blood (the Blood Bank) or donated goods (the Goodwill), explain the profile of those donating "inputs."

For each of the groups you've identified above, create a profile that includes: demographic, psychographic, geographic, or other characteristics shared by members. What makes members of the group similar (shared perspectives, habits and wants)?

For the organization's primary client or customer base, discuss the diversity present and any challenges that presents for the CBO. (What different cultures and languages does the CBO work with?)

Task B: Explain the CBO's marketing objectives: Based on information from the initial meeting with the supervisor, explain the specific marketing objectives the CBO expects to achieve. Establishing CLEAR marketing objectives that include measures of success is CRITICAL as these objectives drive the remainder of the marketing plan. If a CBO's marketing objectives are somewhat vague or unclear, it is up to the student team to fully define appropriate objectives for this plan.

Examples of some areas in which a CBO may set marketing objectives include:

- Planning for fundraising events with a goal of achieving a certain dollar profit and/or attendance level.
- Expanding existing services to a new geographic area.
- Expanding existing services to a new market segment. (For example, many CBO's are unable to reach clients because of language or cultural barriers.)
- Developing and offering a new services to existing clients.
- Increasing volunteer retention or increasing volunteer hours by a specific amount. (For many CBO's, once volunteers are trained, the number who continue to consistently volunteer is low.)
- Implementing improvements in marketing communications by creating promotional materials – digital, traditional, or both.
- Increasing donations from a specific sector by a specific amount.
- Obtaining grant funding for a specific purpose from a specific source.

Remember a meaningful objective should:

- Identify and target specific groups. To whom will we provide the service? From whom are we soliciting donations?
- Be feasible and attainable. The objectives must have a way to be implemented. The funding, staffing, or volunteer resources required for implementation must exist or the team must identify how they will be obtained.
- Be measureable and time-bound. There must be a way to measure BOTH ongoing progress and final results. For example an objective that is measurable and time-bound is: *Increase the number of volunteers who provide 10 service hours per week by 10% in 2016 and by 15% in 2017.*

Mid-Project Check-In

After completion of Collaborative Session 3, students will submit work completed to date on their project. This check-in will allow students to receive feedback from the instructor to facilitate success with the final project. Your instructor will provide a due date for this assignment.

***Collaborative Session 4**: Propose your own new service offering(s) & your own new delivery mechanism(s) to help the CBO reach their marketing objectives for the coming year.*
(Minimum 2 pages. Deadline to be determined by your instructor.)

This section is designed for students to think creatively about what additional services or products the organization might develop and offer and what new ways the organization might reach clients with existing services. Students' proposals must be relevant to the organization's targeted clients or stakeholders, aligned with its mission, and feasible to implement.

Task A: Develop a new service offering(s): Each team member should bring his/her own idea for a proposed new service offer to help the CBO reach the marketing objectives specified in session 3. After thorough discussion, team members should agree on ONE new service offer to include in the marketing plan. This new offer must include recommendations for implementation – what additional funding will be required, what additional staff will be needed, etc. The discussion should also include an estimate of how many additional clients will be served, how much additional revenue will be raised, etc.

Task B: Develop the next year's service delivery mechanism: Each team member should bring his/her own recommendations regarding how EXISTING services might be delivered differently, more effectively, or to new groups of clients. After thorough discussion the team should agree on ONE new delivery mechanism to include in the marketing plan. This new offer must include recommendations for implementation – what additional funding will be required, what additional staff will be needed, etc. The discussion should also include an estimate of how many additional clients will be served, how much additional revenue will be raised, etc.

***Collaborative Session 5:** Develop the CBO's integrated marketing communications plan to support the next year's Marketing Objectives. (Minimum 4 Pages. Deadline to be determined by your instructor.)*

Task A: Develop promotional goals: To achieve the marketing objectives specified in Session 3, each team member should bring his/her own ideas for proposed promotional goals for group discussion. For guidelines refer to Chapter 15, pages 267-268 (Goals of Promotion) and pages 273-275 (AIDA Model and IMC). After thorough discussion of team members' recommendations, the team should build a consensus and create appropriate promotional goals. Goals must specifically support the marketing objectives as described below. Answer the question, "What specifically do the elements of the promotional mix need to accomplish?" Examples include:

- Increase awareness with a specific group or groups about services available (inform)
- Increase attendance at a fundraising event by a certain percent (persuade)
- Achieve a consistent message about the organization's needs by reaching XX people each month for 6 months (remind)
- Build relationships with volunteers or other audiences through social media by increasing the number of fans, posts, shares, or likes (connect).

Task B: Develop the next year's traditional media and social media plans and timeline: After thorough discussion, the team should determine the appropriate mix of media to use to achieve the goals in A. (Refer to Chapters16, 17, &18.) Determine which communication channels (media) will be used and how frequently they will be used. Remember, your media plan MUST be appropriate to the target audience and MUST be one the organization can actually implement. Consider the opportunities and keep in mind the costs of each media selected. Some examples:

- Many media provide Public Service Announcements and assis t with the development of ads
- Free publicity in the form of articles or mentions created by press releases is highly cost-effective
- Direct mail to targeted zip codes / Direct email to targeted constituencies
- 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 remember, any platform selected must be managed consistently.
- Paid digital and traditional advertising.

An effective way to describe how each media will be used is suggested below. Use an Excel sheet or Word table to detail the messages and release dates recommended for a specific time period. 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 your 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 for May fundraiser using newspaper resources.	Print PSA 8 times Measure inquiries from ad.	Print PSA 4 times Measure inquiries from ad.

Task C: Student volunteer activities: Students are required to complete 10 hours of marketing-related volunteer work for their CBO. Generally, the tasks performed are promotional in nature. Accordingly, students will discuss the work they each completed and explain how it aligns with the organization's marketing objectives and / or promotional goals. Be sure to include:

- A clear description of what **each member of the team** did for the 10 hours of volunteer work.
- How the activities aligned with and supported the CBO's marketing objectives.
- What specific results each student achieved through his / her activities.

Collaborative Session 6*: Develop the CBO's implementation, evaluation & control plans. Create an executive summary. (Minimum 3 pages, excluding the executive summary. Deadline to be determined by your instructor.)*

Task A: Develop the CBO's implementation plan for the next year: For this session, each team member should bring his/her own suggestions for group discussion regarding the process that should turn the proposed marketing plan into action assignments (*sequential steps with deadlines)* and ensure that steps are executed in a way that accomplishes the plan objectives.

- Detail the sequential steps required to implement the marketing plan. What actions will be taken when?
- Who will be responsible for implementing the steps? Director of the CBO? Existing staff or new staff? Board members, volunteers, or other connections?
- Consider creating a schedule using Excel or Word to indicate what will be done when and by who may as that may be the clearest way to address implementation.
- Your media plan / schedule above may be included in this section, if it integrates more logically here.

Task B: Develop the CBO's evaluation and control plans: After thorough discussion the team should explain the evaluations and control measures that will be used to achieve the original marketing objectives determined during Session 3. (Refer to Chapter 2, page 28 – 29.) While the original marketing objectives identified metrics to be achieved, it is critical to measure ongoing progress to allow for course corrections in implementation.

- Examples might include measuring an increase in phone calls resulting from advertising, measuring the number of new volunteer sign-ups on a quarterly basis, measuring the profitability of fundraising efforts, an increase in donations, etc. All interim metrics should align with you're the original metrics for each objective
- This section should also identify critical risks of implementation (i.e., not obtaining planned funding, losing a key staff member, inability to obtain regulatory approval, etc.) and how they will be mitigated or overcome.

Task C: Develop an executive summary. An executive summary summarizes a longer report in such a way that readers can rapidly become acquainted with a large body of material through a brief overview of the report. Your executive summary should be NO LONGER 1 – 1 1/2 pages. Some guidelines:

- o VERY BRIEFLY discuss the organization and the critical problem they address
- o Present marketing objectives and briefly explain how they will contribute to the CBO's success
- o Include dates by which key actions driving achievement of objectives will be completed
- o Identify key risks of implementation and how they will be mitigated

Step 3: Submit the Marketing Plan and Present It to the Class

Below is a summary of what should be submitted. The Team Coordinator is responsible for ensuring all parts are included, edited well, and in the proper order.

Contents of the Written Marketing Plan

- Cover Page – include the name of your CBO and all team member names
- Table of Contents
- Executive Summary
- Organizational Description and SWOT Analysis
- Analysis of the CBO's Funding Sources and Expenses
- Proposed Marketing Objectives and Target Segments
- Proposed New Service Offer and New Delivery Mechanisms
- Promotional Goals and Media
- Implementation and Control Plans

Attachments / Addenda: The following documents should be in a separate section **at the end** of your paper:

- The Team Work Log that includes all hours for team meetings, small group meetings, and individual work. The Team Coordinator must sign this document.
- Individual Work Logs detailing activities for 10 volunteer hours, **signed by the CBO Supervisor**
- Students are encouraged to provide "evidence" of their work – photos of themselves doing volunteer service, before-and-after screen shots of websites they've improved, specific locations if flyers were distributed, etc.
- Copies of any promotional materials (hard copy or internet link if applicable) students developed for their CBO as part of their volunteer hours should be included.

Format of the Marketing Plan Report: Margins should be 1-inch top, bottom, right and left. Use headings and sub-headings as appropriate. Spacing should be 1.5. On each page you must provide the sources of information in a form of footnote(s).

Marketing Plan Presentation: Your group will present your marketing plan to the class. Your instructor will establish presentation dates and times.

Peer Evaluations: Peer evaluations will be completed separately. To view the evaluation form, see the S.L. Website

Grading of S.L. Group Projects

Students are expected to contribute to group projects on an equal basis. Group reports and presentations will receive a grade based on the work submitted by the team. All individuals in the group will receive the group grade, provided they have participated fully. Student members may receive a lesser percentage of the group grade based on their participation as evaluated by their colleagues through the "Peer Evaluation" form mentioned above. If a member doesn't take a project seriously (expecting a "free ride"), and the group's evaluation reflects this lack of participation, that individual's grade on the group parts of the project will be reduced by a percentage that may be as high as 50% of the group's grade.

If a member doesn't take the project seriously (e.g., does not respond timely to other members' e-mails, does not attend the group meetings, is late to meetings, doesn't prepare anything meaningful for meetings, etc.), members can collectively decide to FIRE that member from the group. The group should provide the instructor with sufficient evidence early in the semester before firing a member. In the event an individual is fired, he or she may continue the project individually, but will have their final grade on the written plan reduced by 20%. Also, fired individuals will not be allowed to present the project to the class, thereby automatically losing the presentation points (30).

What makes a Qualified CBO?

- A qualified CBO for the MKTG100S SLP would be a non-profit, school, or government organization with a mission geared to helping a needy community (e.g., the poor, new immigrants, kids in poor neighborhoods, etc.), or benefitting the public via its conservancy or rescue efforts, arts/culture promotions, or charity works.

- Organizations that would not qualify for a MKTG100S Service Learning Project would be non-profits that serve only a closed community (e.g. a golf country club; homeowners association, etc.) whose primary missions are not to serve the needy, and whose services/resources are, generally, not accessible to the public.

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

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