Service Learning Requirements

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 non-profit 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**.**

Requirements – Marketing Plan

Marketing Plan: Students will develop 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 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, about 6 of which will be done in class.

Students will proceed through sequential steps described in the following pages. The development of the plan is integrated with chapters from the textbook. Students will engage in several one-hour, in-class Collaborative Group Sessions 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.

Requirements – Other

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

Team Work Log for Hours Spent Developing the Marketing Plan: The team coordinator will keep a log of hours spent on team meetings and individual activities to develop the marketing plan. This work log is available on the service learning website.

Ten Marketing-Related Volunteer Hours: Each student will spend 10 hours performing marketing-related service for the CBO. Students and the CBO will agree on activities, which will be described in the Learning Plan.

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 two articles, review information on the Richter Center's website, and write a review paper. The instructions for this assignment are available on the service learning website.

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

Peer Evaluations and Grading: 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.

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 and Grading: Students are expected to contribute to group projects equally. 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.

In the team evaluation process of the service-learning segment, you will evaluate your own and each of your other team member's performance and contributions. If all team members take the team project seriously and contribute equally, then everybody will receive the team grade. However, any individual team-member that doesn't take the team project seriously and wants to have a free ride will receive a fraction or none of the Team Grade. Loss of individual points will occur based on the following performance (or lack thereof) of a team member:

- Consistently fails to respond to other members' e-mails
- Does not attend Service-Learning 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 projects seriously, the other members can collectively decide to FIRE that member from the team. However, the team should provide sufficient evidence as early as possible for the instructor's consideration. In the case a team member is fired, the individual is given the option of doing the project alone (but he/she will be penalized for failing to be an engaged or contributing team member and will be reduced by 20% of the project grade). Also, fired individuals will not present their project to the class, thereby automatically losing the presentation points (30).

Any problem in a team should be brought to my attention immediately; otherwise you will have to resolve the problem within the Team.

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 team, elect a team coordinator, select a CBO, and arrange a meeting with the supervisor of the CBO (the person who will work with the team to complete the marketing plan and supervise your volunteer hours). Submit individual, signed Learning Plans.*

Task A: 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).

Task B: 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. 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.
- Overseeing the assembly of the Marketing Pl
- an to ensure that all components are included.
- Preparing the Team Work Log.

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, 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. 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. (See previous page for information about types of CBO's that do / don't qualify.)

  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. All team members **are required to attend the initial meeting to start the project.** Team members should bring their Learning Plan, which must be completed and signed by the supervisor and submitted before the start of Session 2.

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.

Task E: Submit your signed, individual Learning Plan 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 the marketing-related tasks each student will perform for the required 10 hours of service.

For the remaining Collaborative Sessions, students should review the tasks to be completed PRIOR to the session and bring their own answers and ideas to each session. Being prepared will allow students to use in-class time more effectively.

Step 2: Develop the Marketing Plan

Collaborative Session 2: *Provide an organizational description of the CBO, an analysis of their financial situation and financial stability, and a SWOT Analysis. The relevant information should be gathered from the CBO's web site, their annual report (if available), the company's profile on Guidestar, and the initial meeting with CBO supervisor.*
(Suggested Length: 5 – 7 pages.)

Task A: Overview of the organization. Provide background information and an organizational description for your CBO.

- Provide a brief outline of the organization's history. Why was it founded?
- Explain the CBO's mission and vision.
- Explain the organizational structure and parties involved in decision-making. Specify the role of volunteers and the organization's Board of Directors (if they have one). If your CBO is a "branch" of a national organization, focus on the local organization.
- Explain the current services offered by the CBO and how they are delivered.
- 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.)

Task B: Explain the CBO's sources of funding and 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

- **Major Sources of Revenue**: Consider the following 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 events and their profitability.
  - Grants / government funding: Does the CBO
  - receive grants from local, state or federal government sources? Identify the agency or organization providing such grants and the purpose of the grants.

- **Major Sources of Expenditure:** Discuss where the organization spends its revenue and *what percentage of total expenses* 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 financial sustainability. Is the CBO financially stable, declining, or growing? The Guidestar website may provide a financial history of the organization's net income year-over-year.

Task C: SWOT Analysis (**S**trength, **W**eaknesses, **O**pportunities and **T**hreats). Perform a SWOT analysis for your CBO. For a guideline, 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 the key issues you discover using the framework.
- Explain how this CBO differs from similar organizations that provide similar services (their competition).

Collaborative Session 3*: Discuss in detail the clients served by the CBO and the CBO's other key stakeholders. Identify and discuss the CBO's marketing objectives.*
(Suggested Length: 3 - 4 pages.)

Task A: Describe the organization's stakeholders. For each of the groups identified, create as complete a profile as possible, including demographic, geographic, lifestyle, or other characteristics. What makes members of the group similar (a shared perspective, similar socio-economic background, facing similar challenges)?

- Clients: Provide a description of those served by the organization. Discuss the diversity present in the client base and how that diversity may present challenges for the CBO. (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?)
- Volunteers: How large is the role of volunteers in sustaining the CBO? Consider the number of volunteer service hours of provided annually. What is the profile of the average volunteer? Why do they volunteer? Describe any special qualifications volunteers must have.
- Donors: Describe the individual and corporate entities that provide funds through donations and/or who support fundraisers.
- Other: If your organization requires things like donated blood (the Blood Bank) or donated goods (the Goodwill), describe the profile of those who donate.

Task B: Clearly state the CBO's marketing objectives. Based on information from the CBO supervisor, state the specific marketing objectives the CBO wishes to achieve for the next year or two. Including measures of success is CRITICAL as these objectives drive the remainder of your marketing plan. Refer to Chapter 2, page 25. If a CBO's marketing objectives are vague or unclear, it is up to the student team to fully define appropriate objectives and 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.
- Obtain grant funding for a specific purpose.

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

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. 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% (10 people) in 2016 and by 15% (15 people) in 2017.* 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 after Session #3. This check-in will allow students to receive feedback from the instructor to facilitate success with the final project.
Your instructor may require you to re-submit the marketing objectives until they are well stated and complete.

***Collaborative Session 4**: Propose your own new service or product offering(s). Develop the tactics you'll use to achieve the marketing objectives stated in #3 above (the steps you'll take to implement the objectives). (Suggested Length: 2 - 4 pages.)*

Task A: Develop a new product or service offering(s). Students should think creatively about what additional services or products the organization might offer or what new ways the organization might reach clients with existing services. Students' proposals must be relevant to the organization's clients, aligned with its mission, and feasible to implement. Each team member should bring his/her own idea for a proposed new service offer. The team should agree on ONE idea to develop. Include an estimate of how many additional clients will be served and / or how much additional revenue will be raised. The new offer must include recommendations for implementation – how will the service be delivered, what additional funding will be required, what additional staff will be needed, etc.?

Task B: Identify Tactics to Achieve or Implement Marketing Objectives. Choose the **one or two** most important marketing objectives from Section #3 (or from your own new service idea above) and determine the steps required to achieve the objective. These steps will form an "implementation plan." Examples follow.

- **Marketing Objective:** *Increase donations by 20% ($50,000) in 2017 through increased participation / attendance in 3 fundraisers.*
  - Tactics to achieve this objective might include:
    - Create a project plan assigning responsibilities for each fundraiser.
    - 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.
    - Identify how many people will be served each month during the first year.

NOTE: You will prepare a marketing communications plan to support your tactics or objectives in the next section, so any details about advertising and communications can be addressed in the next section.

Collaborative Session 5: *Develop the CBO's promotional goals and integrated marketing communications plan to support your marketing objectives. Discuss the activities each individual performed during their 10 hours of volunteer service.*
(Suggested Length: 2 - 4 pages.)

Task A: Develop promotional goals. For guidelines refer to Chapter 15, pages 267-268 (Goals of Promotion) and pages 273-275 (AIDA Model and IMC). Create promotional goals that will specifically support your marketing objectives. Examples:

- Increase awareness with a specific group or groups about the new services available (**inform**)
- Increase attendance at 5 fundraising events (**persuade**)
- Present a constant and consistent message about the organization's need for in-kind donations (**remind**)
- Build relationships with potential volunteers by increasing the CBO's presence on social media (**connect**)

Task B: Develop the traditional media and social media plans and timeline. (Refer to Chapters16, 17, &18.) 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 marketing objectives and tactics. Consider the opportunities and keep in mind the costs of each media selected. Examples:

- Many media 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. Use an Excel sheet or Word table to detail the message content 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 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.

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 CBO's marketing objectives and / or promotional goals. 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 evaluation & control plans. Create an executive summary.

Task A: Develop the CBO's evaluation / control plans. Refer to Chapter 2, page 27 – 29. It is important to measure the progress toward achieving marketing goals. Determine how to evaluate or assess progress toward implementation of marketing tactics and the marketing communications plan to allow for course corrections. How can we tell if we are "on track" toward achieving our objectives?

Examples:

- Measure the increase in phone calls resulting from advertising our services to a new audience.
- Measure the number of new volunteer sign-ups on a quarterly basis.
- Measure the number of sign-ups for a specific event 8, 4, and 2 weeks before the event.
- Assess progress on implementation tactics on a monthly basis to determine if we are achieving key dates for deliverables.

Task B: Develop an executive summary. This section summarizes the longer report in such a way that readers can rapidly become acquainted with the key points of your marketing plan through a brief overview. Your executive summary should be NO LONGER than 1 – 1 1/2 pages. **The Executive Summary is placed AT THE BEGINNING of your paper**.

Guidelines:

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

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

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

Contents of the Written Marketing Plan

- Cover Page: Include the name of your CBO, your Team Coordinator, and all Team Members
- Table of Contents (optional)
- Executive Summary (written *after* the plan is completed)
- Organizational Description
- Analysis of the CBO's Funding Sources, Expenses and Financial Stability
- SWOT Analysis
- Analysis of Stakeholders – Clients, Donors and Volunteers
- Marketing Objectives
- Proposed New Service or Product Offer
- Tactics to Achieve Marketing Objectives / Implementation Timeline
- Promotional Goals / Media Plan
- Student Volunteer Hours Activities & Results
- Evaluation / Control Methods

Attachments: 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 the activities for 10 volunteer hours, **signed by the CBO Supervisor.** Students should provide good detail about their activities and are encouraged to provide samples of their work. Students might, for example, include photos of participation at events or list the specific locations at which they distributed flyers. Copies of promotional materials (before-and-after screen shots of websites improved or brochures students developed) should be included.

Format of the Marketing Plan Report: 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.

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. Remember, student grades may be impacted (negatively) if the students fail to participate fully as evaluated by their peers.