McCombs School of Business

Community Development and Social Enterprise
MKT 372 (04820) CBA 4.304
Wednesday 3:30 – 6:30pm
Spring '07

Instructor: Eugene Sepulveda
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Office hours by appointment

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The **Community Development and Social Enterprise course** offers you a real-world opportunity to apply your and your teammates' business skills while making a difference for the nonprofit you select. You will complete an important project, develop consulting skills and improve your ability to make executive style presentations. You'll be challenged, and you will surprise yourself with how much you know, once you figure out how to apply what you've learned in class. These projects are real, important to your clients and often very important to their clients.

You will work in teams of four or five. In addition to regular class, teams will meet bi-weekly with me, the instructor, to gauge progress, identify problems, revise strategy and otherwise obtain help. You are expected to budget at least six hours outside of class each week to meet project objectives. And, you are expected to speak up. Speak up in your teams when you don't understand, when you have a different perspective or concern, or when there appears to be confusion about expectations and delivery. Speak up with your client if you don't understand, if something doesn't make sense, or if you don't agree with an assumption. And, speak up with me if I can help and you've already tried addressing a problem directly with the source. You may always email me, call me or come by my office.

The class will include a series of practical lessons. There will be specific lectures on managing client expectations, negotiating scope, milestones, timelines & deliverables,

marketing for community-based organizations, fund raising, tools for strategic planning and other applications of business practices to nonprofit management.

Your **grade** will be based on 6 factors:

1) Class participation, attendance, timely submission of required assignments	20%
2) Team member evaluations	20%
3) Interim presentations	10%
4) Final presentation	10%
5) Final report	20%
6) Client feedback	20%

There are **three relationships** for students to manage as each party participates in evaluation and grading: 1) **teammates**, 2) **the client** and 3) **the instructor**.

Regular attendance at all class meetings is expected. Students earn 1 point for each day's attendance. Late arrivals, early departures and excused absences will not earn a point. A point will be deducted for unexcused absences. Be sure the TA signs your name tent each week at the end of class. It is your responsibility to confirm the accuracy of attendance and participation postings on your name tent and in Blackboard. Other instructors sometimes schedule exams in the evening. If a rescheduled exam conflicts with this class, please notify that instructor. They are required by university policy to offer you another option.

For an **excused absence**, email the Professor Sepulveda--at least 48 hours prior to class— with details of why the absence should be excused. You will be notified within 24 hours if an excused absence has been approved.

After the first class, students earn **participation points** (one per class) by asking **substantive** questions or offering **substantive** comments which contribute to class discussion or team progress. A**ssignment points** are earned by submitting requested assignments, selections or other materials on or before each deadline. Additionally, the professor will assign participation scores mid-semester and at the end of the semester. The scores will count for one-half of a student's overall participation and attendance. The assigned score is assigned in consideration of a student's contribution to substantive discussions in class as well as out-of-class meetings.

Team members will provide **evaluations** twice during the semester—aggregate scores from the mid-term evaluation will be posted upon receipt, the final at semester's end. Your teammates will be asked to evaluate you in four areas:

Did you…
1) complete tasks in a timely manner?
2) complete tasks accurately?
3) attend and contribute meaningfully during meetings?
4) contribute and perform in a way that valued each team member?

A copy of the team member evaluation is also attached.*

Teams meet outside of class bi-weekly with the instructor. Times for these meetings should be scheduled with the class's TA or the instructor directly. **Attendance** at these meetings is required.

Client feedback will be obtained and scored during and upon completion of the project. A copy of the Client Team Evaluation document is attached. The instructor reserves the right to modify this client score.

Oral executive briefings will be scored during each presentation. The instructor will look for meaningful, generous presentations with *clarity and focus*, which communicate the points outlined in this syllabus (see dates). Are the project and deliverables specific, strategic, sustainable and do they include a stretch? Was the audience engaged and given an identifiable, specific opportunity to participate or otherwise contribute? Did you communicate substantive information about your project, the challenges, your research, conclusions and your deliverables? Did you do so in a way that engaged the audience? *A copy of the instructor's executive briefing evaluation form is also attached.*

Final reports will also be graded against expectations. Recommendations and work product should be specific, strategic, sustainable and include a stretch. Did the team deliver on the negotiated scope with the deliverables presented during the executive briefings? The report's final score will directly reflect 1) completion of deliverables, 2) methodology and supporting data, and 3) organization and writing (aka readability and usability).

Information about client projects and proposals is **confidential.** You may only share this information with other students in this class, the TA, the instructor and outside consultants/advisors as cleared by the client or the instructor. Additionally, you may discuss appropriate information about your project with our guest speakers.

Professor Sepulveda

Our Schedule

January 17, 2007

Ice day

January 24, 2007

Business Environment: profits, revenues & communities. Nonprofits and opportunities.

Community development, nonprofits, introductions, syllabus review, grading, office hours, project proposals, teams, evaluations, confidentiality

Distribute client proposal summaries

Friday, Jan 26 *Resumes and answers to the four questions due by email to Prof. Sepulveda, with a copy to Patrick Wagner*

Send a copy of your resume and answers to the four questions below to Prof. Sepulveda with a copy to Patrick. Your resume should *include* your major, your GPA and information about any internships you have completed. Send these as one word document (resume first, answers on next page) saved in the following format: lastname.firstname.doc

Your answers should be brief (no more than 2 paragraphs each). This information will be helpful in forming teams and assigning projects.

Four questions: 1) Why did you sign up for MKT 372, Community Development and Social Enterprise? *(ok to admit for the internship credit)* 2) What will make your experience in this class successful 3)What skills or experiences do you bring to add to your team's and class' success 4) Do you have community development interests or experience?

<u>**Jan 31**</u>

Skills/resources: Managing client expectations and student roles & responsibilities

Clear & focused—specific, strategic, sustainable & stretch

Getting started document. Attitude, confidence and credibility. Engagement letters. Discuss benchmarking and business models.

Discuss homework and team liaison

<u>**Fri., Feb 2 noon**</u>**—deadline for choice of projects. Please email Professor Sepulveda (and copy Patrick Wagner) your top 4 choices of projects (#1—top choice, #2 second choice, etc). Also, please include your major with this information—we want to balance teams with necessary skills.**

<u>**Feb 3**</u>

You will be notified confirming your project and team by 1pm on Sat., Feb 3. Teams should meet briefly before class on Wed., Feb 7 to complete the project profile (see blackboard for document).

A team liaison should be named. Determine available dates and times during the next week (after Wed's class) when your team can meet with the client. We will have a short class (ending by 5:30) on Wed (1/31). You might try to schedule a 6:00 meeting with your client that evening.

<u>**Feb 7**</u>   *Teams should come to class with project profiles completed and able to report date & time of first client meeting (if not prior to 2/21—we'll have to reassign your team)*

Class will end by 5:30 in order to facilitate client/team meetings.

Skills/resources: Project Management & Good to Great

Further discuss benchmarking and business models.

Feb 14 *due on or before class:* *draft engagement letters emailed to Prof. Sepulveda & class TA (do not share with your client until you've heard back from Prof. Sepulveda).*

Include final presentation date & time range (3:30 to 6:30 on May 2 for teams 1, 2, 3, 4 & 5; on May 9 <mark>*from 7pm to 10pm*</mark> *for teams 6, 7, 8 & 9). See blackboard for example of an engagement letter.*

Guest speaker: Prof. Stephen Walls
http://www.mccombs.utexas.edu/dept/marketing/directory/faculty/profiles/index-vita.asp?addTarget=7916

Skills/resources: The Fundamentals: The foundation of a marketing strategy.

See instructions for next class meeting. Preparation required.

Feb 21 *Each student should come to class prepared to open the next meeting with your client from the front of the room. [Imagine you've done the work agreed to at the last meeting and speculate what you might have learned.] In 90 seconds or less, simulate opening your next client meeting, summarizing what you've learned since the last meeting and focusing the discussion on the decisions to be made as a result.*

Guest speaker: Dr. Steven Tomlinson
http://www.actonmba.org/people_teachers.php?31

Skills/resources: Driving Decisions: Communication and Presentations That Make Things Happen

Feb 26 & 27

Teams 1, 2, 3, 4 & 5 to schedule run through presentation rehearsal with Professor Sepulveda

Feb 21   *due on or before class: signed engagement letters (including externally communicated timelines and milestones within letter. Additional team milestones as attachment)*

First executive briefing. Introduce your client, the key issue(s), the proposed solution(s), the definition(s) of success and your class ask. Engage your audience. Follow executive presentation template. Be deliberate about how you frame your communication.

Teams 1, 2, 3, 4 & 5 presenting

Mar 5 & 6

Teams 6, 7, 8 & 9 to schedule run through presentation rehearsal with Professor Sepulveda *(meet in CBA 7.204--Mktg conference room)*

Mar 7   *Team member evaluations due to TA, either hard or soft copy.*

First executive briefing: 6, 7, 8 & 9 Introduce your client, the key issue(s), the proposed solution(s), the definition(s) of success and your class ask. Engage your audience. Follow executive presentation template. Be deliberate about how you frame your communication.

Mar 14

Spring Break

Mar 21

Guest speaker: Mr. Phillip Berber, founder, Glimmer of Hope Foundation http://www.aglimmerofhope.org/about_us/leadership.cfm

   Skills/resources: Social Profit enterprises

Mar 28

    Guest speaker: Mr. Patrick Wagner

    Skills/resources: Creative Messaging

    Discussion about final reports
        Sections to include
        Standards of review
            1) Deliverables
            2) Methodology & support
            3) Readability & usefulness

    Also, schedule final presentations by client

April 4   *due in class: one page comparing original timeline and milestones to actual, and including updated schedule. Also, include updated list of deliverables and definition(s) of success.*

    Second executive briefing. Remind us who your client is and what the project is. Engage your audience while giving us details about your methodologies, challenges, work to date and confirmation of deliverables. Within the context of your original timeline and milestones show us your major accomplishments, findings and implications for deliverables.

    Teams 1, 2, 3, 4 & 5 presenting

April 11

    Second executive briefing. Remind us who your client is and what the project is. Engage your audience while giving us details about your methodologies, challenges, work to date and confirmation of deliverables. Within the context of your original timeline and milestones show us your major accomplishments, findings and implications for deliverables.

    Teams 6, 7, 8 & 9 presenting

Friday, Apr 13 by noon to Professor Sepulveda (email copies of final report outlines)

April 18

Work session: final reports

Team meetings with Prof Sepulveda to review report outlines

Optional: Dinner at Professor Sepulveda's home celebrating successful first half of semester.

April 25

TBD

April 30 & May 1

Teams 1, 2, 3, 4 & 5 rehearsal for final presentations *(meet in CBA 4.350)*

May 2 *final team member evaluations due (for those teams presenting this date)*

Teams 1, 2, 3, 4 & 5 final presentations. **Your clients have agreed to attend.**

May 7 & 8

Teams 6, 7, 8 & 9 rehearsal for final presentations *(meet in CBA 4.350)*

May 9, 7pm to 10pm *final team member evaluations due teams 6 - 10.*

Due: all project reports (email soft copy and submit hard copy)

Teams 6, 7, 8 & 9 final presentations. **Your clients have agreed to attend.**

The University of Texas at Austin provides upon request appropriate academic accommodations for qualified students with disabilities. For more information, contact the Office of the Dean of Students at 471-6259, 471-4641 TTY.

By teaching this course, I have agreed to observe all faculty responsibilities. By enrolling in this class, you have agreed to observe all student responsibilities described in policy documents. If the application of University policy statements to this class and its assignments is unclear in any way, it is your responsibility to ask me for clarification. Policy on Scholastic Dishonesty: Students who violate University rules on scholastic dishonesty are subject to disciplinary penalties, including the possibility of failure in the course and/or dismissal from the University. Since dishonesty harms the individual, all students, and the integrity of the University, policies on scholastic dishonesty will be strictly enforced. You should refer to the Student Judicial Services website at http://deanofstudents.utexas.edu/sjs/or the General Information Catalog to access the official University policies and procedures on scholastic dishonesty as well as further elaboration on what constitutes scholastic dishonesty.

Password-protected class sites will be available for all accredited courses taught at The University. Syllabi, handouts, assignments and other resources are types of information that may be available within these sites. Site activities could include exchanging e-mail, engaging in class discussions and chats, and exchanging files. In addition, class e-mail rosters will be a component of the sites. Students who do not want their names included in these electronic class rosters must restrict their directory information in the Office of the Registrar, Main Building, Room 1. For information on restricting directory information see: http://www.utexas.edu/student/registrar/catalogs/gi02-03/app/appc09.html.

A student who is absent from a class or examination for the observance of a religious holy day will be given an opportunity to earn the attendance and participation points within a reasonable time after the absence, if proper notice has been given. Notice must be given at least fourteen days prior to the classes scheduled on dates the student will be absent. For religious holy days that fall within the first two weeks of the semester, notice should be given on the first day of the semester. It must be personally delivered to the instructor and signed and dated by the instructor, or sent certified mail, return receipt requested. A student who fails to complete missed work within the time allowed will be subject to the normal academic penalties.

Client confidentiality is a serious matter. Students who violate the requirements for confidentiality are subject to disciplinary penalties, including the possibility of failure in the course and/or dismissal from the University.

Team Member Evaluations

Team member being evaluated: _____

Student providing evaluation: _____

Project team: _____

Date: _____

	5-strongly agree 4- agree 3-mostly 2-did not 1-strongly disagree	Comments
1. The team member completed their tasks in a timely manner.		
2. The team member completed their work accurately.		
3. She/he attended, cooperated in scheduling, and contributed in meetings and to the overall project in meaningful ways.		
4. And, the team member contributed and performed their work in a way which made me feel my opinions and contributions counted.		

Other comments:

Individual review sheets will remain confidential. In general terms, comments expressed by more than one team member will be shared with subject.

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Community Development & Social Enterprise
Consulting Teams

CLIENT TEAM EVALUATION

Client: _____

Evaluator: _____

	5-firm yes 4- yes 3-mostly 2-no 1-firm no	Comments
1. The project's final scope was thoughtfully & respectfully negotiated.		
2. During the semester the team adequately invested in due diligence & research.		
3. The team identified & addressed the critical issues.		
4. Communication was outstanding. The team stayed in contact and we understood project status at all times.		
5. We were appropriately informed and consulted throughout the project.		
6. The team developed appropriate knowledge of our organization & its industry.		
7. The team's work meets our expectations.		
8. The team's work exceeds our expectations (any comments?).		
9. The final report is realistic given our operations, resources & mission.		
10. Our organization will implement the team's recommendations.		
11. The recommendations will otherwise be of value: (please explain)		
12. On a scale of 1 to 5 (5 being highest) please rate the value of the project.		

Did any one or two team members standout in some way? If so, who and how?	n/a	
A. Would you recommend a Community Development project team to a colleague?		
B. Are you interested in a MBA or undergraduate consulting team next semester?		

Any suggestions for improvement in the course (*including proposal process, communication with/from instructors, scheduling of final presentations*)

Other comments (*please feel free to offer any suggestions or other comments. If so indicated, these will remain confidential*)

It is sometimes helpful to quote client feedback when discussing potential projects with prospective clients. If you are so inclined, one or two sentences about your experience with the consulting team might be helpful to use as a quote:

Thank you for allowing me and the students the opportunity to work with your organization. Feel free to contact me directly with any questions, comments or suggestions.

Many thanks,

Eugene Sepulveda (office 232-4192)

Please return this evaluation form to Eugene Sepulveda, either by email
(Eugene.Sepulveda@mccombs.utexas.edu) or by fax (512) 233-2366.

Community Development & Social Enterprise
Instructor Executive Briefing Evaluation Form

Team: _____

Date: _____

Presenting students: _____

	Strongly Agree 5	Agree 4	Neutral 3	Disagree 1	Strongly Disagree 0	Notation
Launch (# sentences each part) **Framing of dialogue Context Diagnosis of Key Issue Specific Proposed Solution Definition of Success The Ask** Message is stated early? Key points outlined? What's going on? Who is the client? What do they do? What's the task?						
Middle—appropriate elaboration on major points in launch? End Ask						
Framing—was the frame deliberate and appropriate?						
Engaged the audience?						
Communicated substantively? Do we know the plan, timeline, research findings, challenges and deliverables?						
Specific—The solution & goals. Compelling in ask (focus). Thorough Strategic—how fits in big picture Sustainable—Realistic given resources & culture a Stretch? – exceeding vs. meeting expectations. Light bulb						
Authority—did the team claim & yield? Credible, do homework, show respect for client & audience. Value everyone's time						

Deliverables—clear, a stretch, useful/realistic, success defined?						
Grade of final study as presented?						
Questions?						
Eye contact effectively connect speaker w/ audience						
Speakers talk w/ audience rather than to notes or screen						
Speakers use plain English, avoiding slang, acronyms & jargon						
Important ideas repeated						
Speakers tie back to key points throughout the presentation						
Body language appropriate						
Visuals clear, legible & free of distractions						
Speakers give credit to original sources of copyrighted materials						
"Take away" summary provided						
Recency--Closing line clearly presented						
Presentation fits within the time limit						
Questions effectively fielded						
Score this presentation						