Overview – IMPACT Interterm

The theme for this final "Interterm" is IMPACT – *Business as a Force for Good*. The goal in the design and selection of the experiences you will see on the following pages is to provide you with the opportunity to use your background and experiences to serve a non-profit or social enterprise with a real, live business challenge or opportunity. Additionally, these projects provide a channel for adding knowledge and exposure to a mission of interest that we hope you will continue to pursue after Mendoza.

This document serves as a syllabus of sorts. In it you will find information on what to expect, expectations of you, both from the school and the organizations, as well as course requirements. The information is sectioned out as follows:

- What This Week of Projects Will Look Like
- Important Expectations
- Course Credit Details
- Travel Expense Reimbursement (for those courses requiring travel)
- Project Listing with Descriptions

Questions? Feel free to reach out to Alice Obermiller, Assoc. Dir for Experiential Learning (aobermil@nd.edu).

What This Week of Projects Will Look Like

While each project is different in scope, most will follow this familiar format:

- **Day 1 (Monday) – Foundation / Expectation Setting + Organizing / Starting the Work**

  Kicking off in the morning, the organization will set the landscape on who they are, what they do, background on who their serve or support, introduction of staff that will be involved, and an overview of their business challenge or opportunity (the reason you're there).

  From there, expectations for the week are set, and the work begins. If you're operating on a team, the group should organize around a process for scoping out the work, as well as documenting initial questions that start to emerge.

  The day should conclude with a check-in with the organization on how things are shaping up, as well as the opportunity to ask questions, a critical component of the process.

- **Days 2 (Tuesday) and 3 (Wednesday) – Work and Check-ins**

  These two days are spent in the flow of a typical client engagement:

  - Deep dive into the problem/opportunity through research and analysis.
  - Checking-in with the organization to ask questions and gather additional data.
  - Mapping out recommendations with implementation and measurement strategies.
  - Documenting the final deliverable that will be left with the provider on Thursday.

  The check-ins with the organization on these days are key to ensuring your final deliverable will meet their expectations, and that you are going deep enough into the issue and not heading down dead-end paths. These check-ins also serve as mile markers for your work.

- **Day 4 (Thursday) – Final Presentation/Deliverable to the Organization + Debrief**

  On this last day, you present your final deliverable to the organization through a final presentation and/or report. The outline for this deliverable, at a minimum, should include the following:

  1. **Problem Identification** -- Brief restatement of the problem or opportunity in your own words based on what you learned in the process.

  2. **Research and Analysis** -- Overview of the methods and data you used for researching and analyzing, including conceptual frameworks and models applied.

  3. **Recommendations** -- Final recommendations based on the two points above along with evidence as to why you settled on these as the best recommendations.

  4. **Thoughts on Implementation Strategy with Measurements** -- Notation on how those recommendations might be implemented, including potential timeline and standards for how success would be measured.

  It's not unusual for organizations to invite other staff, outside advisors or board members, and sometimes clients into the final presentations. Be prepared for this possibility.

  The conclusion of this last day will culminate in a debrief between the organization and the students on how the week went, including feedback and completion of the Student Evaluation, which they will give to each student, with a copy to Alice Obermiller.

Each organization will lay out the week as it supports the needs of the project as well as their schedules. The daily outline above should serve as a foundation, but organizations may change the flow or what they require based on the work. For example, some may include site visits, meetings with clients, observations of sessions or work by the constituency they support, etc.

Important Expectations

- The organization will let you know details like start time on Monday, location, dress code, etc., in an introductory email they will send prior to Interterm week.

- Some organizations will send along pre-reading to help you become familiar with their mission or their issue prior to your arrival. Typically, it's information that you can easily absorb a day or two before you start.

- Most organizations will require you to sign a Non-Disclosure Agreement, Confidentiality Agreement, or Statement of Intellectual Property Rights. In order to maximize your ability to help them with their 'live' problem, they will want to share confidential information to allow you a thorough experience. You will generally sign that first thing when you arrive on Monday.

- When conducting research on these projects, it is expected that you go beyond just using the Google search engine. Check in with the Mahaffey Library at any time if you are looking for resources. Most can be accessed off campus.

- Organizations expect four full days of work, meaning that Thursday will end based on their schedules. Some may specifically want to conclude by mid-day, others may have the final presentation mid-afternoon. In all cases, you should expect to conclude on Thursday no earlier than 4:30-5:00pm. If your opportunity requires you to travel, base your travel arrangements on this concluding time.

- Finally, while organizations know that you're an MBA, they primarily recognize you as a business professional that can and want to help them. As a representative of Notre Dame and Mendoza, we expect nothing less than your best and brightest efforts for these organizations.

Course Credit Details

- Each course is 1 credit, and you may only register for one course per "Interterm" session.

- You must participate in the full Monday–Thursday schedule to receive credit.

- Organizations will complete a Student Evaluation at the conclusion of the work that will be used in assigning the *satisfactory/unsatisfactory* grade for the course. A grade of *satisfactory* is required to receive the full 1 credit. These Evaluations will be submitted to Alice Obermiller for purposes of assigning the final grade.

- Organizations have high expectations in standards of professional behavior and deliverables. Feedback on students from providers to the contrary may result in an *unsatisfactory* grade.

Travel Expense Reimbursement

We're excited to offer a number of IMPACT projects located beyond the campus and city of South Bend where you can serve and leave a lasting legacy. This document outlines what you need to know about expenses and expense reimbursement. **This is mandatory reading for any Interterm course requiring travel.**

Expense Limits

Expenses for Interterm opportunities requiring travel has a cap of $1,000 per student (transportation, lodging, and meals). While full trip documentation, including expenses must be fully documented (see below), **if the total expense request exceeds the capped amount, the expense report will be approved at $1000.**

Most opportunities requiring travel will comfortably fall under this cap, and students are expected to follow the University policies on spending limits. Some opportunities because of their location will have an amended increase in the cap to ensure students are not limited by the expense. Students registered for those opportunities will be notified of their amended cap. In all cases, we encourage the use of Airbnb or other shared lodging arrangements, as well as ride-sharing to manage cost where appropriate.

Expense Policies

The University requires full trip documentation for auditing purposes. Each expense report will require the following:

- ❑ Signed Student Travel Certification form (a sample copy shared directly after this section). This form must be filled out by the student, and then sent to Alice Obermiller for signature before uploading to the expense report. **Reports will be returned if they do not include this form.**

- ❑ Full-trip documentation – each leg of the trip must be accounted for either by receipt or comment in the header of the report. For example:

  - *You stay at a family member's house at no cost to you.*
  - *You stay in a hotel room in which another student incurred the expense.*

  You must indicate on your expense report when, where and with whom you stayed. Each leg of the trip must be accounted for from doorstep to doorstep as well as the return.

- ❑ The University will not reimburse the leg of travel to alternate locations after Interterm week.

  If you are not returning to South Bend directly after Interterm (due to Spring Break), you must obtain a quote for the cost of a return flight to South Bend from your assigned destination and attach it to your report with a comment explaining your travel plans. This is the amount for which you will be reimbursed for your return flight (not to exceed the $1,000 allotment).

  For example, if your opportunity is in New York and you choose to fly home directly to Denver for Spring Break before returning to school, you must document what it would cost to return to South Bend from New York for reimbursement.

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- If you must share an expense, please divide the expense where each individual has their own receipt, or elect one person to claim the expense. For example:
  - *You are sharing a hotel room or an Uber.*

  Please have the vendor divide the bill among guests or have one person submit for reimbursement. All receipts should be itemized with totals matching claim amounts. Any agreements made between students to settle charges are the responsibility of said students.

  Please note that alcohol is not a reimbursable expense. It must be deducted from the total receipt in the case of meals.

Expense Reporting

Travel expense requests must be processed through the University's expense website at https://travel.nd.edu. Expense reports should be logged within 60 days of the travel date. Processing can take up to 15 business days.

Expense reporting procedures are available at:
https://travel.nd.edu/assets/235943/add_expenses_and_submitting_reports_guide.pdf

Commonly Used FOAP Expense Account Numbers

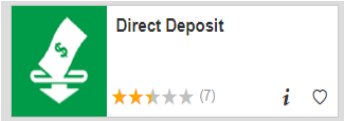
77010 - Airfare (domestic)
77050 - Lodging (domestic)
77060 - Meals (domestic)
77030 - Ground transportation (domestic)
77020 - Conference fees (domestic)

Under the "DETAILS" tab in the expense report, please add Jennifer Ransbottom as approver and submit expense report.

Expense Reimbursement

How do I pick up my reimbursement?

Reimbursement depends on how the requestor's account is set up. Options include direct deposit or a check. If the student does not have direct deposit they will be notified by phone or email by Accounts Payable or GBP Student Services when the check is ready. The student will need to present an ID at 725 Grace Hall to receive their check. To set up a direct deposit, use the app on InsideND.



For more information on Student Travel and Tax Implications.

Questions on Travel?

Please contact Jennifer Ransbottom at jransbot@nd.edu.

PRINT RESET

University of Notre Dame
Student Business Travel Certification Form

DO NOT COMPLETE THIS FORM FOR NON-TRAVEL REIMBURSEMENTS

A completed Student Business Travel Certification Form must be submitted with a travel expense report when requesting reimbursement to a student for University business travel in order for the payment to be made on a tax-free basis under the University's Accountable Plan rules. Similar to the method used for attaching other receipts, this form should be scanned and attached to the student's travel and expense report filed through travelND.

Name of Student _____

NDID or NetID_____

Location and Dates of Travel: _____

I certify that these expenses (check all that apply):

____Directly supports a faculty member's project or research program, or;

____Are related to presenting or leading a session at a conference (a photocopy of the conference program is attached), or;

____Are incurred while officially representing the University

Note: The detailed business purpose for student travel must be described on the Travel and Expense Report that this Certification Form is attached to.

If none of the above criteria are met, this form should not be completed and the reimbursement will be classified as a fellowship/scholarship/award (FSA). The payment of FSA may represent taxable income to the student (please give the student a copy of the University's FSA letter) and may be subject to withholding and reporting if paid to an international student.

_____ _____

Signature -Faculty member Date
University of Notre Dame

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IMPACT PROJECTS

SPRING 2019 COURSES

The pages ahead describe the IMPACT Projects that are open to MBA19s (which includes OY19s).

	PARTNER	PROJECT	LOCATION
1.	**Catholic Volunteer Network**	Attracting Gen Z and Millennial Volunteers	Takoma Park, MD
2.	**City Colleges of Chicago**	Talent Performance Evaluation Process Development	Chicago, IL
3.	**CommonBond** (student loans)	Industry Benchmarking Analysis (In FinTech)	New York, NY
4.	**Cultivate** (culinary school & catering)	Sourcing and Sustainability in Food Rescue	South Bend, IN
5.	**DistinXion** (basketball camps)	Financial Sustainability Through Impact & Sponsorship	Bloomington, IN
6.	**enFocus - South Bend** (4 projects)	Establishing Operational Efficiency in Food Service (schools) Scaling for a Healthcare Startup Building Capacity for Data Driven Human Resources (schools) Marketing Strategy Development (workforce development)	South Bend, IN
7.	**Feed the Hungry**	Monitoring & Evaluation Analysis	South Bend, IN
8.	**Heart of the Horse**	Financials for Equine Therapy Horse Ranch	Tucson, AZ
9.	**Horizons for Youth** (youth mentorship)	Models for Increasing & Maintaining Mentors	Chicago, IL
10.	**Hurry Home** (home finance)	Replicating Success in New Regions	South Bend, IN
11.	**Immigration Advocates**	Establish Pricing Strategy for Digital Naturalization App	New York, NY
12.	**Misericordia** (disabled support)	Improving the Financial Performance of a Coffee Business	Chicago, IL
13.	**Mixed Hub** (diversity, family & fashion)	Fundraising Strategy Analysis & Preparation	Los Angeles, CA
14.	**MPAAAC** (Michiana Performing and Adaptive Arts Community)	Growth Strategies for Community Arts	South Bend, IN
15.	**Practice Makes Perfect**	Elementary Curriculum Provider Competitive Analysis	New York, NY
16.	**Querencia Studio** (fashion)	Pop-Ups and Real Estate in Sustainable Fashion	Brooklyn, NY
17.	**The Arc of Philadelphia** (disabled support)	Increase Sponsoring Organizations and Paid Memberships	Philadelphia, PA
18.	**United Way of St. Joseph County** (2 projects)	Strategies for Renovating Donor Giving Channels Strategies for Survival of Volunteer Income Tax Asst (VITA)	South Bend, IN
19.	**Upstate** (legislative app)	Target Audience Profiling & Marketing Strategy Development	Raleigh, NC
20.	**Waves For Water** (2 projects)	Marketing Success to CSR Partners Scaling Up Courier Programs	On-Campus Mendoza
21.	**Youth INC** (youth support)	Design On-boarding for New Board Members	New York, NY

ATTRACTING GEN Z AND MILLENNIAL VOLUNTEERS

Catholic Volunteer Network (Takoma Park, MD)
Yonce Shelton, Executive Director
(M-Th, *daily times TBD*) / Max. 3 students

Background:
CVN fosters and promotes full-time domestic and international faith-based volunteer service. As the leading membership organization of Christian volunteer and mission programs, we support and enhance the work of our members through volunteer recruitment, training and resources, networking opportunities, and advocacy. In the past year, CVN supported 28,000 volunteers serving with 185 programs. Our member programs have 776 staff, and we have 130,000 former volunteers throughout 45 states and 109 countries.

The Opportunity:
This project will help us make improvements that enhance our *recruitment* on behalf of member programs. That is the major benefit that many need from us. Many programs rely heavily on our efforts to identify, reach, and appeal to potential applicants – and introduce them to our range of member programs. Ideal applicants are mostly young adults on college campuses. While we have a full-time recruiter who spends 75% of her time on the road, and visits 10 colleges annually, we must do better online. We must take our great history and story and figure out how to draw people in better.

CVN has several projects underway that seek to: enhance our online presence; more strategically target young adults (and others) most likely to be attracted to our volunteer opportunities; learn about online preferences, behaviors, and communication channels of Millennials and those in Gen Z; and help us attract more diverse applicants (ethnically/racially; and economically).

We believe a very focused project will help provide: 1) insights, data, and recommendations based on assessment and research; 2) design of a survey for visitors to our website; and 3) ideas for improving how we capture data about diverse demographics (so that we can better advertise and evangelize).

The project would be well timed since the ND team will be building upon a few months of work by CVN's communications and marketing consultant, whose efforts include these foci. She will have provided information and data to help this project.

Students taking this course will:

- Depart with an understanding of the ways in which service, spirituality, intentional community, and discernment come together to offer a unique model for exploring meaning and growth.
- Gain insight into how inbound marketing can be used to help advance communications and recruitment goals.
- Be exposed to a pressing need in our society: how to respect, understand, and engage with diversity in ways that shape mission and programs.
- See how branding/marketing relates to other organizational priorities such as fundraising.

Prerequisites:
There are no prerequisites for this course.

PLEASE NOTE: Participants may be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will take place in Takoma Park, MD. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

TALENT PERFORMANCE EVALUATION PROCESS DEVELOPMENT

City Colleges of Chicago (Chicago, IL)
Rohit Paul, Executive Director of Employee Talent, Performance, and Succession
(M-Th, *daily times TBD*) / Max. 5 students

City Colleges of Chicago (CCC) is the largest community college system in Illinois and one of the largest in the nation, with over 4,000 faculty members and staff serving more than more than 80,000 students annually at seven colleges and five satellite sites.

With locations across the City of Chicago, the seven colleges include Richard J. Daley College, Harold Washington College, Kennedy-King College, Malcolm X College, Olive-Harvey College, Harry S Truman College and Wilbur Wright College.

CCC also oversees the award-winning Washburne Culinary & Hospitality Institute, the French Pastry School, the Parrot Cage Restaurant at South Shore Cultural Center, the Sikia Banquet Facility, five Child Development Centers, the Center for Distance Learning, the Workforce Academy and radio station WKKC FM 89.3.

Background on the Opportunity/Challenge:
City Colleges of Chicago is implementing a new performance process for all employees. Eight years ago, the organization implemented a private consulting firm's recommended performance process. It failed and as a result, the organization shied from moving forward with any performance initiative. The new Chancellor and Chief Talent Officer both believe that performance management is critical for productivity. As a result, the Performance Management team developed a goal-setting process that will be phased over the course of two years. The success of this performance process will determine whether the organization continues with the implementation plan. The MBA team will assist the Performance Management team with feedback, data summary, and evaluation of potential vendors in order to market appropriately and effectively the proposed performance process to employees.

Students who enroll in this course will:

- Learn more about change management in a public sector environment, employee engagement and its ultimate effect on organizational productivity, employee training and development, and creating a long-lasting culture focused on results.
- Understand how critical marketing is in implementation of large-scale initiatives, how the procurement process in government works, and the importance of listening.
- Think more creatively in their leadership abilities when faced with limited finances and bureaucratic processes, developing appropriate metrics to drive decision making, strategic planning, and the right time to implement processes.

Prerequisites:
This opportunity is open to everyone. Ideal students should have interest in human resource and talent performance management.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in Chicago, Illinois. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

INDUSTRY BENCHMARKING ANALYSIS

CommonBond (New York, NY)
Alexis Peschiera, Marketing Director
Jessie Taylor, Senior Marketing Manager
(M-Th, *daily times TBD*) / Max. 4 students

CommonBond is a financial technology company on a mission to give students and graduates more affordable, transparent, and simple ways to pay for higher education. The company offers new loans to current students, refinance loans to college graduates, and a suite of student loan repayment benefits to employees through its CommonBond for Business™ program. By designing a better student loan experience that combines advanced technology with competitive rates and award-winning customer service, CommonBond has funded over $2 billion in loans for its tens of thousands of members. CommonBond is also the first and only finance company with a "one-for-one" social mission: for every loan it funds, CommonBond also funds the education of a child in need, through its partnership with Pencils of Promise.

Background on the Opportunity/Challenge:
CommonBond offers undergraduate student loans. The market for college student loans is massive, but concentrated among entrenched players. As a newer entrant, CommonBond needs to build trust and credibility with parents and students and find innovative and efficient marketing channels to message. The undergraduate loan is a co-signed product, which means that a student needs an eligible co-signer to apply with them (and essentially "vouch" for the student that they'll cover the loan if the student can't pay). This makes the consumer journey more complex—from education to final purchase, there are two distinct audiences and then two "actors" within the loan application.

This project will require thorough research on the company's target demographics (college-bound high schoolers and their parents). They expect that the team will help them compare the company's brand and product with the rest of the providers in the industry. Additionally, they will be able to go through CommonBond's undergraduate cosign application and provide analysis of user experience, design, ease of use, product options, etc. They can compare that experience to the experience with other competitive applications. They're ultimately looking for recommendations when it comes to future tools/ educational information that CommonBond could include as part of their loan application experience.

Students who enroll in this course will:

- Experience what it's like to work at a growth-stage fintech startup.
- Offer strategic recommendations that could help drive the business this year.
- Gain experience evaluating and designing a strategy for a tech startup competing against entrenched players.
- Get feedback and learn from working with experienced founders, product leads, and marketers.

Prerequisites:

- Understanding of core dynamics of financial products & student loans (i.e. interest rate, APR, deferment, etc.).
- Background in marketing an eCommerce business (i.e. funnel analytics, conversion metrics, targeting/retargeting, SEO/SEM).
- Key Classes/Frameworks: MBA Core Curriculum - Finance, Accounting, Marketing, Strategy and SWOT analysis.
- MBA Concentrations preferred: Marketing, Analytics, Strategy.
- Ability to synthesize data from diverse sources into a coherent story and translate into actionable recommendation.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in New York, NY. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

SOURCING AND SUSTAINABILITY IN FOOD RESCUE

Cultivate (Culinary School & Catering) (South Bend, IN)
Jim Conklin, President and Co-Founder
Todd Zeltwanger, Director of Fund Development
(M-Th, *daily times TBD*) / Max. 6 students

Background:
Cultivate is a 501(c) (3) not-for-profit organization devoted to ending the cycle of joblessness, poverty and hunger in the local communities of northern Indiana by providing a food rescue service and job training in the culinary arts. Cultivate collects food donations from several sources, such as grocery stores, restaurants, or catering services. We then redistribute the perishable food and create meals from the non-perishable food. As a result, people in our community who are depending on the food they receive from us will have a predictable supply. We are a skilled middle agency, a food logistics company that matches surplus with demand. We believe our model is more efficient and effective than the traditional model which dumps a bulk of unpredictable food supply on a kitchen staff of a social service agency.

Since our mission began in 2017, we have rescued more than 150,000 pounds of food, which has allowed us to provide more than 86,000 meals to hungry people in our community. We provide food to more than 45 local organizations who support more than 10,000 food-insecure people in our community.

The Opportunities:

There are three areas where Cultivate needs help. Registered students will select the project they wish to work on when the team gathers on Day 1.

1. The Big Picture (3 students)
   An opportunity exists to provide an overview on all of the things it will take for Cultivate to be sustainable. Current financials will be provided for review, along with projected budgets for future years. A desired outcome would be the creation of a five-year strategic plan containing the necessary steps to achieve sustainability.

2. Food Suppliers (1 student)
   The goal here is to research and compile a list of prospective prepared and unprepared food suppliers, both inside our current geographic territory of St. Joseph and Elkhart counties and also outside those two counties. A desired deliverable would be the creation of a form letter that could be sent to prospective food suppliers requesting their support. The supply of meals can only be enlarged by increasing the amount of available food used to prepare the meals.

3. Freeze-Dried Project (2 students)
   Freeze-drying food is a way to preserve the nutritional value of food for 25-30 years. Students will research the viability of investing in a commercial freeze-drying machine by researching the following variables: machine brands and costs, amount of food needed to efficiently operate a large commercial machine, production capabilities of various machines, potential markets for the finished products, ROI considerations, etc.

Students taking this course will:
- Research sustainable practices to enable a not for profit to move from infancy to stability.
- Learn about the food insecurity problem and those who are involved in addressing the problem.
- Learn how freeze-dried food can help to reduce the food waste and food insecurity problem.

Prerequisites:
There are no prerequisites for this opportunity.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This Immersion will be based in South Bend, IN at Cultivate site. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

FINANCIAL SUSTAINABILITY THROUGH IMPACT AND SPONSORSHIP

DistinXion (Bloomington, IN)
Luke Zeller, President and Founder
Dalton Judd, Chief Operating Officer
Nathan Cobine, Director of Marketing
(M-Th, *daily times TBD*) / Max. 3 students

Background:
DistinXion is a non-profit organization founded by Luke Zeller and the Zeller family to provide an integration of elite character and sports training to help build family relationships. We are dedicated to not only developing better athletes, but better people and stronger families through basketball camps, private training, teams, speaking engagements, and tournaments. Our staff and volunteers are dedicated to serving communities around the Midwest with one mission in mind: to make a positive impact on the athletic culture by building up families and developing positive character in young athletes.

The Opportunities:
Students will work closely with the DistinXion Staff on the development and refinement of DistinXion's revenue generation processes, primarily focused on sponsorship and donation strategies for 2019 and beyond. Students will get the unique opportunity to work within a mission-focused organization whose first priority is impact; with a secondary priority to remain financially sustainable while making that impact.

Students taking this course will:

- Offer an immediate impact by helping the organization gain momentum through donation and sponsorship strategies.
- Learn to develop and maintain relationships with revenue-providers within a non-profit setting.

Prerequisites:
There are no academic prerequisites for this opportunity. This opportunity is ideal for individuals with an interest in sports as it relates to building character and support of local communities.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement in order to access confidential information.

Logistics:
This "Interterm" Immersion will take place in Bloomington, Indiana, approximately 4 hours from South Bend. Students are encouraged to drive. More information on travel can be found under "Travel Reimbursement Details" at the beginning of this catalog.

About:
Luke Zeller, the eldest Zeller boy, grew up in Washington, Indiana. At Washington High School, Luke graduated as valedictorian with a 4.0 GPA, won the Mr. Basketball award, was named to the McDonald's All-American Team, and was awarded the Trester Mental Attitude Award after hitting a half-court shot to lead the Hatchets to a state championship. Luke played college basketball at the University of Notre Dame, graduating with a degree in Business Management and Entrepreneurship. During his professional basketball career, he played with the Phoenix Suns and in Japan, Lithuania, California, Texas, and Arizona. Luke founded DistinXion in 2010 and has served as the President since. He is also a certified Gallup Strengths Coach. Luke married Hope in 2010 and they have an adorable son, Kyston.

Dalton Judd is the current COO at DistinXion. He joined the organization in May 2017 after graduating from Indiana University with a degree in Management.

Nathan Cobine is the current Director of Marketing at DistinXion. He joined the organization February 2016 after graduating from Indiana University with a degree in Marketing and Entrepreneurship.

ESTABLISHING OPERATIONAL EFFICIENCY IN FOOD SERVICES

enFocus (South Bend, IN): Elkhart, IN Community Schools

Patrick Jones, Program Director

(M-Th, *daily times TBD*) / Max. 4 students

Background:

enFocus is a South Bend based non-profit that builds better communities through talent attraction and civic innovation. We bring an "entrepreneurial focus" to communities by employing recent graduates to work on innovation projects in a one-year Fellowship program. enFocus Fellows address our communities' toughest challenges by working with sponsor organizations, including city government, school districts, health systems, private businesses and nonprofits.

Elkhart Community Schools (ECS): In 2016, ECS announced a bold initiative: the "Elkhart Promise", a five-year strategic plan proposing far-reaching changes to curriculum, programming, and facilities to better serve ECS students, staff, and the greater Elkhart community. As district leadership carries out the sweeping changes detailed in the 2017-2022 strategic plan, they are also reassessing current operations to ensure that ECS is competitive with the best school districts in the region.

The Opportunities:

enFocus began working with ECS in January 2019 to identify areas for improvement in the Food Services department. ECS Food Services has accrued a budget deficit in recent years, and the district believes new models for sustainability and new processes and systems could be implemented for Food Services to improve efficiency.

To best support ECS, enFocus has been contracted and seeks to:

- Discover root causes of paint points and identify best practices;
- Design innovative solutions to address the identified problems, and
- Implement solutions with ECS staff to assure a long-lasting impact for the district.

In February 2019, the enFocus team will have determined preliminary processes and identified pain points within the department. For the March Interterm, it is expected that students will provide this strategic change initiative with a deep dive analysis and recommendations on addressing a portion of the problem at-hand.

Students may be asked to participate in the following immersive experiences during the week:

- Shadowing breakfast and lunch preparation and service at ECS.
- Shadowing ECS food delivery drivers in ride-alongs to ECS schools.
- Observing food delivery from vendors to ECS.
- Observing employee time/attendance policies.

Students taking this course will:

Addressing strategic change initiatives within non-profit or governmental institution presents a unique opportunity. Through this experience, students are expected to learn:

- Business management in a non-profit setting.
- Non-profit/governmental financial management.
- Prioritization of business projects based on their strategic and economic value.
- Implementation strategy of strategic initiatives in a non-profit/governmental organization.
- Differences in business operations between for-profit and non-profit entities.

Prerequisites:
While there are no set prerequisites, we are looking for 3 key deliverables from the students:

- Identify operational gaps and provide recommendations to prepare the program for scale.
- Develop marketing strategy to grow the user base.
- Develop a marketing strategy and deck to build CSR partnerships specific to the courier program.

PLEASE NOTE: This unique opportunity is confidential and students participating in this course will be expected to sign a nondisclosure agreement.

Logistics:
This Immersion will be based in South Bend, IN at the office of enFocus. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

SCALING FOR A HEALTHCARE STARTUP

enFocus (South Bend, IN): Healthy Points
Patrick Jones, Program Director
(M-Th, *daily times TBD*) / Max. 4 students

Background:
enFocus is a South Bend based non-profit that builds better communities through talent attraction and civic innovation. We bring an "entrepreneurial focus" to communities by employing recent graduates to work on innovation projects in a one-year Fellowship program. enFocus Fellows address our communities' toughest challenges by working with sponsor organizations, including city government, school districts, health systems, private businesses and nonprofits.

Healthy Points: Healthy Points is a healthcare technology company that promotes prenatal self-management of at-risk pregnant women by providing a platform for secure communication among patients and healthcare management staff. Incubated and tested with enFocus over the last several years, Healthy Points launched as its own company in June 2018. Through early proof-of-concept programs, Healthy Points has saved local health systems nearly $1,000,000 across a total of 30 patients.

The Opportunity:
It was identified through market validation that potential customers are interested in purchasing the technology for their existing interventions if Healthy Points demonstrates similar results to the early proof-of-concept programs with a full-scale clinical trial. Currently, the Healthy Points team has contracted enFocus to design and lead this clinical trial, hopefully leading to an increased customer-base.

With a culture of continued progress, Healthy Points is hoping to understand how their technology product can scale with this potential increase of customers. Healthy Points has enough technology storage space to serve 500 app users (475 patients and 25 healthcare management staff) and is not currently integrated with the electronic health record (EHR). By year 4 of operations, Healthy Points is anticipating serving over 25,000 patients and 1,250 healthcare management staff.

Students may be asked to participate in the following during the week:

- Deep dive into Healthy Points business plan and current operations.
- Perform research on legal/HIPAA obligation of business associates in the healthcare sector which may include:
    - Online research
    - Legal document review
    - Interfacing and interviewing with federal gov't employees, healthcare executives, and experienced healthcare entrepreneurs

Students taking this course will learn:

- Scale-up strategies for a startup.
- Implementation planning of recommended scale-up strategy.
- Technology use/integration cognizant of ethical decision-making and legal regulations within the healthcare sector.

Prerequisites:
It is recommended that students have skill or experience within the healthcare sector, entrepreneurship or business operations for either large or small companies. It is ideal for students pursuing a career in entrepreneurship, or business management/operations of health systems, insurance companies, federal health organizations

PLEASE NOTE: This unique opportunity is confidential and students participating in this course will be expected to sign a nondisclosure agreement.

Logistics:
This Immersion will be based in South Bend, IN at the office of enFocus. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

BUILDING CAPACITY FOR DATA DRIVEN HR

enFocus (South Bend, IN): South Bend Community School Corp.
Patrick Jones, Program Director
(M-Th, *daily times TBD*) / Max. 4 students

Background:
enFocus is a South Bend based non-profit that builds better communities through talent attraction and civic innovation. We bring an "entrepreneurial focus" to communities by employing recent graduates to work on innovation projects in a one-year Fellowship program. enFocus Fellows address our communities' toughest challenges by working with sponsor organizations, including city government, school districts, health systems, private businesses and nonprofits.

South Bend Community School Corporation (SBCSC): The SBCSC has been making a concerted effort to improve their efficiency, effectiveness, and organizational strength for the past few years. With a shrinking budget they are interested in creating a more efficient organization. This is particularly true in the human resources department where the director is motivated to infuse a human capital mindset.

The Opportunity:
enFocus has been working with the SBCSC since August 2018 to identify areas for improvement in the human resources department. Data integration into personnel processes is one critical area for improvement for SBCSC to attain their vision of an efficient and effective organization. There are several policies and processes that could be improved through better data usage, including areas such as time & attendance. Ultimately the department would like to improve their data management, as well as increase their capacity to use data for strategic operations.

The enFocus team has mapped out key human resources processes such as time & attendance, as well as some of the major pain points and potential costs. It is expected that students will provide this change initiative with a deep-dive analysis and recommendations on addressing the problem at-hand.

Students may be asked to participate in the following immersive experiences:

- Observing employee time/attendance policies.
- Shadowing HR and departmental staff.
- Learning about current information systems.

Students taking this course will:
Through this experience, students are expected to learn:

- Business management in a non-profit setting.
- Non-profit/governmental financial management.
- Prioritization of business projects based on their strategic and economic value to SBCSC.
- Implementation strategy of strategic initiatives in a non-profit/governmental organization.
- Differences in business operations between for-profit and non-profit entities.

Prerequisites:
It is recommended that students have skill in process mapping (we use Lucidchart at enFocus), Excel, project management, and/or process improvement (Six Sigma). It is ideal for students interested in:

- Nonprofit business management
- Project management
- Strategic planning
- Education

PLEASE NOTE: This unique opportunity is confidential and students participating in this course will be expected to sign a nondisclosure agreement.

Logistics:
This Immersion will be based in South Bend, IN at the office of enFocus. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

MARKETING STRATEGY DEVELOPMENT

enFocus (South Bend, IN): WorkOne
Patrick Jones, Program Director
(M-Th, *daily times TBD*) / Max. 4 students

Background:
enFocus is a South Bend based non-profit that builds better communities through talent attraction and civic innovation. We bring an "entrepreneurial focus" to communities by employing recent graduates to work on innovation projects in a one-year Fellowship program. enFocus Fellows address our communities' toughest challenges by working with sponsor organizations, including city government, school districts, health systems, private businesses and nonprofits.

WorkOne: WorkOne Northern Indiana is a nonprofit organization focused on workforce development for a five-county area including, Elkhart, Fulton, Kosciusko, Marshall and St. Joseph counties. WorkOne assists regional businesses by connecting them with jobseekers and providing resources for hiring, training and retaining workers. WorkOne also provides employment assistance programs for jobseekers, including specialized programs for veterans, youth, dislocated workers and those with disabilities.

The Opportunity:
enFocus began working with WorkOne in Fall 2018 to identify opportunities for organizational improvement. Although enFocus is assisting WorkOne leadership with several initiatives, we have prioritized a need to develop a comprehensive marketing and communications strategy. WorkOne's success is dependent on facilitating connections between businesses and jobseekers; however, these parties are often not aware of WorkOne's offerings in the region. The broad scope of WorkOne's mission and the large variety of job assistance programs have proven difficult to communicate in an effective way to target audiences.

enFocus is partnering with WorkOne to develop an enhanced marketing strategy, with the ultimate goal of connecting more businesses and jobseekers in Northern Indiana. Students will work closely with the enFocus team to develop a marketing strategy and implementation plan. It is expected that students will provide this strategic change initiative with a deep-dive analysis and recommendations on addressing the problem at-hand.

Students may be asked to participate in the following immersive experiences:

- Shadowing and interviewing WorkOne staff.
- Attending WorkOne stakeholder meetings.
- Interviewing regional employers and jobseekers.
- Implementing a digital marketing strategy using tools such as Google AdWords.
- Facilitating strategic planning exercises.

Students taking this course will:
Through this immersive experience, students are expected to learn:

- Non-profit/governmental management.
- Marketing canvas development and marketing strategy.
- Stakeholder and project management.

Prerequisites:
It is recommended that students have skills in business strategy, marketing, customer validation, and/or project management. It is recommended for students pursuing a career in:

- Nonprofit business management

- Workforce and economic development
- Marketing
- Strategic planning
- Consulting

PLEASE NOTE: This unique opportunity is confidential and students participating in this course will be expected to sign a nondisclosure agreement.

Logistics:
This Immersion will be based in South Bend, IN at the office of enFocus. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

MONITORING AND EVALUATION ANALYSIS

LeSEA Global Feed the Hungry (LGFTH) (South Bend, IN)
Gene Donahue, Director of Logistics & Supply Chain
(M-Th, *daily times TBD*) / Max. 3 students

Background:
LGFTH is an international relief agency headquartered in South Bend, Indiana (feedthehungry.org) which currently operates in twenty-one nations. Founded in 1987, the non-profit works through indigenous local partners and affiliates to deliver food aid and development assistance. This approach maximizes efficiency and ensures programs embrace a culturally-sensitive context. LGFTH provides emergency relief to victims of war, drought, famine and other disasters as well as a nutrition security program that currently serves more than 250,000 orphaned and vulnerable children (OVC's).

The long-term success of these programs is dependent on the organizations ability to develop and implement Monitoring and Evaluation (M&E) processes with indigenous partners.

The Opportunity:
The objective of this interterm opportunity is to research and recommend potential mechanisms through which performance indicators are measured and feedback information is relayed back from our field operations.

Students taking this course will:

- Conduct an in-depth assessment of the existing M&E program's design, implementation, and results/outcomes.
- Research and develop improvements in process of collecting program management and results data (quantitative and qualitative activities, outputs, and outcomes) and progress or achievement of program goals and objectives.
- Determine the worth, value, or success of the program, including the process of how results/outcomes have been achieved and what can be done to make improvements.
- Identify and provide solutions to potential cultural, technological, or programmatic inhibitors.
- Identify intended and unintended changes and then consider if program activities are the contributing factor to those changes.

Prerequisites:
There are no prerequisites for this opportunity. This opportunity is ideally suited for students who have interest in how organizations measure impact.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This Immersion will be based in South Bend, IN. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

FINANCIALS FOR EQUINE THERAPY HORSE RANCH

Heart of the Horse (Tucson, AZ)
David Lavin, Founder
Renee Mack, Events Director
(M-Th, *daily times TBD*) / Max. 4 students

Heart of the Horse is a special place, with special people from varying walks of life. You will find people here smiling, hugging horses, petting goats, dogs, and cats. We have worked very hard to create an environment where offering a helping hand and sharing knowledge with one another is as normal as hitting the snooze button in the morning. We respect the horses here beyond what they can do for us in having a great time riding. Everyone here has a sense of, "I wonder how my horse feels about this." It's a culture of kindness, other-centeredness, and self-awareness.

David Lavin, the company's founder, is a equine therapist and horseman, born in England. He grew up in New York and Chicago, and spent 4 years working in Montana and Colorado as a wilderness and equine therapist for troubled youth. Upon witnessing the magic and change that horses can bring, he has focused his efforts on creating a place where people can learn, grow, enjoy, and come together through horsemanship. David values that horses can be vehicles of self-awareness, compassion, confidence, and relationship.

Background on the Opportunity/Challenge:
Heart of the Horse is a 2-year old institution in Tucson, Arizona that's growing very quickly. They now generate revenue using four different product categories, including Equine Therapy, Horse Boarding, Trail Rides, and Riding Training. In the last year, the company has scaled to over 150K in revenue and needs help tracking their revenue, expenses, and capital investments. At this time, most of their financials are hand recorded, so they're looking for help converting performance into a modern format with an established process for keeping it up-to-date and current. They're also looking for help converting those financials into projections so they can begin to set realistic goals and think through the necessary requirements in order to reach new heights. Part of this exercise will also include goal setting for the business and providing recommendations on how the company can scale at a pace that's manageable in the short and mid-term. The ranch is located in beautiful Tucson, Arizona and operates similar to a community center, with many diverse part-time employees that volunteer to help care for the property and the horses.

Students who enroll in this course will:

- Learn how to establish practical financial statements that showcase basic business performance over time.
- Understand how to convert financial statements into projections using a set of key assumptions.
- Be able to coach an entrepreneur on how to use financial models and projections to set realistic goals for the business.

Prerequisites:
This opportunity is most ideal for students that are interested in outdoor, ranch-style living and building successful lifestyle businesses. Basic understanding of financial statements and modeling is a must.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:

NDINTERTERM

This "Interterm" Immersion will be based in Tucson, Arizona. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

MODELS FOR INCREASING AND MAINTAINING MENTORS

Horizons for Youth (Chicago, IL)
Audrey George, Executive Director
(M-Th, *daily times TBD*) / Max. 3 students

Background:
Horizons For Youth In 1990, a handful of altruistic young friends found themselves reflecting on the success they were experiencing in the professional sphere as well-educated young people. They began to wonder why every child who grew up in Chicago did not have the same opportunities for success that they did. Which barriers were preventing others from fulfilling their professional, educational, and financial potential?

After much dialogue and reflection, our founders recognized the formula to their success had been quality education, strong adult support network, and exposure to new experiences. Determined to share their same access to opportunity, they founded Horizons for Youth with the mission of removing barriers, creating opportunity, and connecting children to new experiences. They began by gathering funds to cover parochial school tuition and enrichment outings for the first class of five Horizons for Youth Scholars, and when parents expressed a need for positive adult role models, our funders added the mentorship program to their model as well.

After 28 years, Horizons for Youth has continued its mission and grown to serve 262 students. We continue to be the first and only organization providing scholarship, mentoring, and enrichment programs for children from kindergarten to high school, with continued academic and socio-emotional support through college. Horizons for Youth Scholars receive our services for up to 17 years, resulting in a 99 percent high school graduation rate and 98 percent college enrollment. As we've expanded to also serve our alumni through college, we continue our success with 80 percent of our college students' costs secured through outside resources and 84 percent persisting through college. Wanting to stay true to the original mission, Horizons for Youth hopes to expand these opportunities to as many children possible in the Chicago area.

The Opportunity:
One of the core components of our structure is our Big Sibling Mentoring Program. As our students come from Chicago's low-resource communities and strive to be the first in their families to graduate college, providing students with a mentor can have drastic impact. By providing consistency and serving as a positive role model in students' lives, research has shown that students paired with a mentor are:

- 52% less likely than their peers to skip a day of school,
- 55% more likely to enroll in college, and
- 90% more interested in becoming a mentor themselves.

At Horizons for Youth, each student kindergarten through high school is paired with a 'Big Sib' Mentor. Mentors participate in a short information session, complete an application, and undergo a background check to ensure the safety of our students. Once paired with a 'Little Sib,' mentors sign a one-year contract and meet twice each month–once at one of our scheduled Monthly Enrichment Outings, and once at a one-on-one meeting, organized by the mentor. On average, 'Big Sib' Mentors at Horizons for Youth are young professionals, four-year college graduates, and have a willingness to commit their time to our students.

As Horizons for Youth continues to expand our services in Chicago, the need for mentors to pair students with has also grown. Currently, we have 18 students in need of an individual mentor, the most

students we have seen unpaired in the last decade. Additionally, we have recently found difficulty in attracting and retaining mentors, as well as in their attendance to student events. As mentors are core to our service delivery, we find ourselves needing to assess if this is a temporary issue related to set circumstances, or if this is the new normal. The answer to that question will have a significant impact on our program delivery model moving forward.

Students taking this course will:

- Come to understand how not-for-profits cross-collaborate and sustain their own organizations through a scarcity of human resources.

Prerequisites:
There are no prerequisites. For this course we seek students who are experienced, or interested in, issues surrounding marketing strategies, volunteer talent acquisition, and volunteer engagement.

PLEASE NOTE: Participants may be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will take place at the Horizons for Youth offices in Chicago, IL. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

REPLICATING SUCCESS IN NEW REGIONS

Hurry Home (South Bend, IN)
John Gibbons, Co-Founder
Jada Mclean, CEO & Co-Founder
(M-Th, *daily times TBD*) / Max. 4 students

Hurry Home is a Techstars company that provides alternative financing for homes for which banks cannot profitably originate mortgages, enabling renters to become homeowners.

At the core of Hurry Home is our effort to try to solve a big problem - many Americans have been shut out of the mainstream paths to homeownership, missing out on the key way families build wealth. One part of this problem comes from some of the houses being too affordable. There are desirable houses that cost less than $60,000 and there are people who want them, but banks are unable to profitably originate mortgages for properties in this range. The prospective homeowners are left to either continue renting, earning no equity, or find seller-financing, a field with its own big problems. Hurry Home offers a different way.

Background on the Opportunity/Challenge:
Hurry Home needs help preparing for expansion and replicating the success they've experienced in South Bend, Indiana. Ideally, they'd like help developing a rubric that they can use to prioritize new markets and regions for expansion. They expect that this will include a competitive analysis with focus on similar business models to learn what has been most successful when scaling this type of real estate financing solution. They would like help identifying the ideal location for expansion, based on need for their type of financing solution and presence of demand and opportunity zones. Example metrics to consider for the analysis are demographics of prospective markets and the pricing range of houses. Ultimately, the company wants a help defining a growth strategy based on preliminary research of ideal regions to launch. After you select the ideal new region, Hurry Home would like assistance assembling a launch and marketing strategy so they can begin taking advantage of the opportunity this year.

Students who enroll in this course will:

- Gain experience defining a real startup expansion strategy considering limited resources
- Assess opportunities to replicate success in new regions
- Build a formal launch plan to take advantage of opportunity in new region
- Work with a social enterprise that directly impacts the lives of people in their school's city
- Explore creative ways to market to an underserved demographic

Prerequisites:
This opportunity is open to everyone, especially those who appreciate and want to learn more about the Real Estate Finance market. Any previous experience administering market research, ideating growth strategies, and/or developing marketing plans is a plus.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This Immersion will be based in South Bend, IN. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

ESTABLISH PRICING STRATEGY FOR DIGITAL NATURALIZATION APP

Immigration Advocates (New York, NY)
Rodrigo Camarena, Immigration Advocates Network Director
Sandra Sandoval, Citizenshipworks Program Manager
(M-Th, *daily times TBD*) / Max. 4 students

The Immigration Advocates Network (IAN) is a collaborative effort of leading immigrants' rights organizations designed to increase access to justice for low-income immigrants and strengthen the capacity of advocates and organizations serving them. Our team of designers, strategists, and immigration attorneys work with leading immigrant advocacy organizations to bridge the digital divide, launch new campaigns, and bring the tools of justice to hard to reach communities. We take on big problems, build new technology, and bring resources to where they're needed the most.

The focal organization for this engagement is called Citizenshipworks, which is a personalized path to citizenship for many immigrants in the US. Citizenshipworks is a collaboration between the Immigration Advocates Network, Immigrant Legal Resource Center, and Pro Bono Net. We aim to make the immigration system accessible to everyone through user-friendly technology, plain language legal information, and a national network of nonprofit immigration service providers.

Citizenshipworks helps immigrants become a U.S. citizen, step-by-step. Their goal is to answer all questions and connect immigrants to the help you need online or in-person. Based on decades of legal expertise, they are making applying for citizenship safe and simple, start to finish.

They are mission driven and donation based. Citizenshipworks offers solutions for nonprofit legal services providers, nonlegal community-based organizations, and individuals who want to apply for U.S. citizenship.

Background on the Opportunity/Challenge:
The Immigration Advocate Network is in need of a pricing strategy for its hallmark online naturalization product Citizenshipworks. With Citizenshipworks, you can self-screen for eligibility, complete all your naturalization paperwork, and connect to virtual or in-person legal assistance. To accomplish this, students will engage in market research to get up-to-speed on similar products available in the market, the pricing scheme they use, and the process they use to accomplish their goals. After establishing a comprehensive pricing strategy, Citizenshipworks is looking for help establishing revenue projections based on attainable sales numbers.

Students who enroll in this course will:

- Perform a competitive analysis, price a digital product, and develop revenue projections.
- Learn about immigrant services, naturalization products, legal technology, and related fields.
- Be able to work alongside digital strategists, immigration attorneys, product managers, and developers.

Prerequisites:
This opportunity would be best suited for students with:

- Experience in business development, finance, or strategy consulting.
- Experience in market analysis, revenue modeling, and pricing helpful.
- Experience with digital products, marketing, and/or legal services strongly encouraged.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

ND INTERTERM

Logistics:
This "Interterm" Immersion will be based in New York, NY. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

IMPROVING THE FINANCIAL PERFORMANCE OF A COFFEE BUSINESS

Misericordia (Chicago, IL)
Chris Hegg Krackenberger, Administrator
(M-Th, *daily times TBD*) / Max. 3 students

Background:
Misericordia is a Chicago based not-for-profit that is home to over 600 adults and children with developmental disabilities ranging from moderate to severe. We strive to provide the highest quality residential, training and employment services. Misericordia provides a full continuum of care from skilled nursing to homes in the community. We operate on a 31 acre campus on the north side of Chicago; we have an additional 13 homes in the community, 1100 employees and an annual budget exceeding $70M.

The Opportunity:
Misericordia currently operates a coffee packaging and sales program as a work opportunity for our residents. The current program involves hand packaging, which is the right level of skill for many people with intellectual and developmental disabilities who work in the business. Hand packaging is value added, and provides the social value of an important employment opportunity for our residents. This type of labor is considerably more costly than automated packaging. The cost of hand packaging, along with limited production capacity, makes expanding the brand beyond those individuals or businesses that already support Misericordia a challenge. Adding automated packaging would allow the Misericordia coffee business to take advantage of being able to provide a more competitive price to sell to the Chicago corporate and retail community and take advantage of the excellent name recognition and reputation that Misericordia has in our community.

The coffee business at Misericordia is an important part of the lives of over 50 residents. Finding work opportunities for our residents is a constant challenge. We have incubated a number of businesses over the years with the primary goal of providing good job opportunities for our residents. While a number of employers try to provide work opportunities there are just not enough of them to serve the needs of our residents and other people with intellectual and developmental disabilities. While Misericordia currently has a number of businesses that we operate, we don't have the business background and skills to get the most of the businesses that we operate.

We would like you to look at all aspects of the coffee business, to understand the challenges we face in competing with some of the cost disadvantages mentioned earlier. You will be able to look at all aspects of the business from ordering, to production, to sales, to inventory management, to expansion to help identify ways for us to improve the financial performance.

Students taking this course will:

- Have the opportunity to interact with the people that run and manage the coffee business.
- Help our residents and our leadership achieve more with the business.
- Learn how business can provide work for the developmentally disabled in their community.

Prerequisites:
There is no special background required. This would be a unique opportunity to give back and help the lives of our residents.

Logistics:
This "Interterm" Immersion will take place on the Misericordia campus in Chicago, IL. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

FUNDRAISING STRATEGY ANALYSIS AND PREPARATION

Mixed Hub (Los Angeles, CA)
Sonia Smith-Kang, Founder
(M-Th, *daily times TBD*) / Max. 4 students

Sonia Smith-Kang is the founder and creative executive of Mixed Hub and Mixed Up Clothing, Inc. She has created her brand based on her multicultural background. As a biracial woman of African-American and Mexican-American descent, Sonia is a proud military brat born on Puerto Rico and raised on the Hawaiian island of O'ahu. She is married to her Korean-American husband and they are parents to 4 multicultural, multiracial and multilingual children.

It was while raising her children and talking to other families like hers that she became a resource to parents and began her over 2 decades of work in the multicultural community. While serving as a community leader, educator and activist, Sonia saw the need to build a tech and media company that represents the fastest-growing population while working to amplify their voice and increase visibility for this community.

She developed a space for them to engage and learn from one another. A space that was missing in the parenting/media/tech space. A portal of information created by and for multicultural parents and called it the Mixed Hub. Mixed Hub is a one-stop space of curated fashion, e-commerce, news, events, businesses that supports and uplifts the multicultural community via this modern lifestyle brand.

Mixed Up Clothing is a multi-ethnic children's clothing line inspired by the textiles, cultures and people of the world, to develop friendships through fabrics. Sonia infuses ethnically diverse styles with cultural twists, blending materials and designs from all corners of the earth.

Smith-Kang and Mixed Up Clothing have been seen on NBC's Today show, The Real, CBS News, ABC News, Latina Magazine, NPR's KPCC, Huff Post Live and showcased across the U.S.

Sonia is co-founder of MultiCulti Corner, a diverse community of multicultural people and families that explore Los Angeles learning about other cultures. She is also co-founder of Mixed Heritage Day, a day of community bringing together those who identify as mixed race, interracial, and transracially adopted. She writes and contributes for numerous media outlets including Medium, Upworthy, The Mixed Up Blog and Huffington Post.

Sonia holds a BS in Nursing from the University of San Francisco and currently lives in Los Angeles, where she is president of a non-profit organization called Multiracial Americans of Southern California and sits as board member of Northridge Hospital Foundation.

Background on the Opportunity/Challenge:
Sonia is a serial entrepreneur that recently launched Mixed Hub and is looking for help cultivating the vision and growth strategy, which should ultimately inform her fundraising strategy. The goal of this engagement is to help Sonia position her company for success in her fundraising pursuits. She would ideally like help identifying similar organizations that have successfully raised funding in the past and the process/strategy they used to get there. It would be most helpful to understand the structure of that financing and what the financing was ultimately used for. Ultimately, Sonia wants to be better prepared for her fundraising efforts. This likely includes detailing the product, traction, vision, team, and financials.

Students who enroll in this course will:

- Research and propose solutions to the challenges, demonstrate skills of critical thinking and critical business decision-making analysis.
- Communicate effectively in a business setting with colleagues and communities for the purposes of influencing the future of an organization.
- Integrate decision making across all business functions.
- Develop effective strategies while understanding the importance of ethical decision making.
- Explain the global strategic issues facing a business and its strategies taking into account cultural differences.
- Demonstrate knowledge, skills and dispositions associated with effective collaboration with peers, founders and community.

Prerequisites:

- Students should have the ability to create business reports that effectively communicate business strategies, practices, and goals using emerging technology and management theories online and in-person.
- They should also have basic knowledge of Microsoft Office, Adobe, Excel, Google Docs, and other relevant industry-specific programs.
- They should also have basic knowledge website programming and maintenance. This can also include a general understanding of web design and SEO, HTML, CSS and Wireframing.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in Los Angeles, California. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

GROWTH STRATEGIES FOR COMMUNITY ARTS

Michiana Performing and Adaptive Arts Community (MPAAAC) (South Bend, IN)
Jetta Cruse, Executive Director
(M-Th, *daily times TBD*) / Max. 5 students

Background:
MPAAAC Michiana Performing and Adaptive Arts Community, (MPAAAC) is a not-for-profit 501(c)(3) organization formed to provide art education and performance opportunities to people regardless of ability. We offer dynamic and constantly-evolving art education programs. Although we currently offer music and dance classes, our focus is on providing education, training, and performance opportunities in all genres of fine art. Most activities are in small groups and scheduled into eight-week sessions. The tuition is offered at a low rate so that students can afford to pay out-of-pocket or private-pay.

The school is staffed by working artists, and all structured activities are led by master artist-teachers. All instructors are required to complete sensitivity training which aids them in working with students with cognitive and physical challenges. We offer arts for all abilities-our classes are filled with students who wear many labels such as autism, Down syndrome, cerebral palsy, and ADHD. We also have students with no cognitive or physical diagnosis, just a desire to learn an instrument, dance, or song. All students learn together, play together, and perform together in local venues in our community - all in the name of performance art.

The founder, and Executive Director, Jetta Cruse, has been a music special-educator for over twelve years, and has been a professional performing artist in the Michiana area for the past thirty years. In that time, she has established a reputation of being a champion for the performing arts and for people with physical and cognitive challenges. She is the leader with the vision of bringing the arts to people regardless of their ability, and integrating our community with people of all abilities learning, and performing together.

The Opportunities:
There are three areas where MPAAC needs help. Registered students will select the project they wish to work on when the team gathers on Day 1.

1. **Strategic web development** (2 students) -- develop a strategy and plan for developing MPAAAC's website including ecommerce platform, recommendations on design details, development and maintenance costs, as well as project timeline for implementing.

2. **Strategic plan for space usage during downtimes** (2 students) -- recommend potential usage of space during day time hours when space is underutilized; should include market research on potential audiences to market space availability to, as well as a marketing communications plan for implementation.

3. **Business Plan Analysis and Revision** (1 student) -- review and recommend refinements to MPAAACs current business plan relative to market segmentation and targets, including the creation of marketing avatars for each population.

Students taking this course will:
- Help move a growing organization to its next level.
- Instruct a non-profit on managing and maintaining its business towards growth.

Prerequisites:
The projects requiring specific background experience or expertise are the Strategic Web Design project – students should have some web design and/or digital marketing experience; and the Business Plan Analysis and Revision – student should have strategic business planning experience, or someone who has developed a business plan previously. The Space Usage project is best suited for those who are willing to conduct market research and exercise their creativity to find imaginative alternatives.

PLEASE NOTE: Participants may be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This Immersion will be based in South Bend, IN. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

ELEMENTARY CURRICULUM PROVIDER COMPETITVE ANALYSIS

Practice Makes Perfect (New York, NY)
Karim Abouelnaga, Founder
(M-Th, *daily times TBD*) / Max. 4 students

Practice Makes Perfect partners with K-12 schools to narrow the achievement gap and create greater equity in the world. Since 2010, this has been done through our flagship summer program that has been recognized by global leaders, national news outlets and local politicians for providing low-income children with access to programming that has historically only been accessible to their middle class and affluent peers. Over the years, we've worked with over 60 different schools across New York City. Today, we partner with schools to deliver services to drive academic outcomes that help students realize their full potential.

Background on the Opportunity/Challenge:
In the last year, Practice Makes Perfect (PMP) has entered the year-round student support services market (i.e. Saturday Academy programs, After school enrichment programs, Intensive Tutoring during the day and after school, push-ins and pull-outs, etc.) and is interested in learning about others who are in the space to best position its services and maximize the opportunity. The ideal outcome of the project would be to provide PMP with a strong and differentiated go-to-market strategy to propel the organization's long-term success.

Students who enroll in this course will:

- Describe how a social enterprise navigates city bureaucracy to serve low-income students and families.
- Analyze the internal and external forces that influence the triple bottom line for a small education company.
- Experience the inner-workings of low-income public schools across some of NYC's most disadvantaged neighborhoods.
- Create a marketing strategy for an education company working with some of the U.S.' most vulnerable populations.

Prerequisites:
This opportunity would be most ideal for students interested in learning more about educational programming geared for low income families. Students should have taken an intro marketing and accounting classes. Marketing and finance concentrations preferred. Proficiency with Microsoft Office is required.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in New York, NY. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

POP-UPS AND REAL ESTATE IN SUSTAINABLE FASHION

Querencia Studio (Brooklyn, New York)
Devin Gilmartin, Co-Founder, President & Creative Director
Tegan Maxey, Co-Founder & CEO
(M-Th, *daily times TBD*) / Max. 4 students

Querencia Studio is a multifaceted fashion brand dedicated to addressing the social and environmental issues facing the fashion industry by utilizing the United Nations' Sustainable Development Goals as a framework for all endeavors.

Querencia Studio was born from a desire to make fashion more sustainable. Beginning in 2016 with t-shirts and hoodies, we aimed to bring a new product that emphasized ethical practices without sacrificing aesthetics. Gaining traction and visibility through high engagement on social media marketing and influencer campaigns, the brand grew. As we participated in pop-ups around New York, we noticed the startling number of vacant retail spaces.

Since then, through short to medium term agreements with landlords and real estate developers, activations via profit share agreements, we have been able to occupy two vacant spaces of 4,000 sq. ft.

Background on the Opportunity/Challenge:
This multifaceted project will explore potential future retail opportunities using this model, dive into cost/benefit analysis of the approach and look further into marketing strategies to maximize local audiences and foot traffic at our current locations on the Upper East Side (Manhattan) and Williamsburg (Brooklyn).

The project will culminate in the initiation of a new advertising campaign, digital and print. Students will hear about our business and emphasis on the United Nations' Sustainable Development Goals. By leveraging our audience and the opportunity for exposure, they will build out a map of potential areas of interest for expansion while accessing a network they will have access to beyond the project.

Students who enroll in this course will:

- Become familiar with the United Nations' Sustainable Development Goals through engaging stakeholders and collaborators in our retail and event spaces across New York City.
- Understand nuances of developing relationships with key real estate companies and landlords and leveraging our network to benefit their marketing of the space.
- Engage with industry executives in fashion and retail.

Prerequisites:

- Prior background/interest in retail, fashion, and/or real estate is highly recommended.
- Tools for use in this exercise: Microsoft Suite, Adobe Suite, Google Drive.
- It would be helpful if participants have a rudimentary understanding of Instagram business profiles.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in Brooklyn, NY. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

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INCREASE SPONSPORING ORGANIZATIONS AND PAID MEMBERSHIPS

The Arc of Philadelphia (Philadelphia, PA)
Joseph Mancini, Executive Director
(M-Th, *daily times TBD*) / Max. 4 students

The Arc of Philadelphia, founded in 1948 by a group of parents, was one of the nation's first Arc chapters and one of the first service providers in the city of Philadelphia for people with intellectual disabilities. These parents labored tirelessly for equal rights at a time when institutionalization was the norm.

Being an important player in many of the disability-related civil rights advances, we were deeply involved in the fight to shut down the state institutions. Along with other Arc chapters, we fought the battles that led to the right to education for all children, regardless of disability. We were also an early pioneer in integrated services for children and adults with disabilities. At every step in the fight for equal rights, The Arc has been a vibrant catalyst for change at the local, state, and national levels.

Today, The Arc of Philadelphia continues to provide advocacy, referral, family supports, and legislative action.

Background on the Opportunity/Challenge:
The Arc of Philadelphia needs help increasing their traction in two key areas: number of paid members and sponsoring organizations.

They need help assessing best practices of how other community centers leverage the private sector for support with endeavors. They want assistance better attracting interest from commercial private-sector businesses. The Arc programs typically leverage volunteer and financial support from local private enterprises. They're looking to add 10 new sponsors to the list through a creative marketing campaign that showcases the benefits and helps to convert interest into action.

One of their additional goals is to increase their paid membership by 25% over the next year. They're looking for help with marketing strategies and tactics to attract the population they serve, which has traditionally been members of their community that are living with intellectual disabilities.

Students who enroll in this course will:

- Devise a strategy to increase community awareness in a non-profit social program.
- Understand the complexities of converting interested private sector parties into sponsors of non-profit activities.
- Learn more about the importance of focusing on development strategies as a non-profit.
- Craft a sales and marketing plan to increase formal memberships.
- Learn more about strategic planning for a mid-size non-profit with regional chapters and a national reach.

Prerequisites:
This opportunity is open to everyone, especially those who appreciate and want to learn more about community development and populations with developmental disorders.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in Philadelphia, PA. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

STRATEGIES FOR RENOVATING DONOR GIVING CHANNELS

United Way of St. Joseph County (South Bend, IN)
Laura Jensen, President & CEO
(M-Th, *daily times TBD*) / Max. 3 students

Background:
United Way of St. Joseph County (UWSJC) mission is to mobilize our community to collectively reduce poverty. Founded in 1914, UWSJC is a nonprofit organization dedicated to creating long-lasting change, ensuring all residents have access to the building blocks to a better life: education, income and health. UWSJC secures vital resources and builds multi-sector partnerships that support a broad array of critical health and human service needs in our community. We achieve results by working with more than 50 local agencies and over 12,000 donors, advocates and volunteers. UWSJC also operates several core programs that move people out of poverty and into economic self-sufficiency.

United Way is different than most charitable organizations. Instead of having one set of leaders or one common goal, United Way is community-based. This means that each United Way throughout the US and abroad maintains its own standards and goals specifically tailored to its interests. Essentially, United Way is by the people, for the people living in that specific community.

While United Way is both a fundraiser and a social service provider, for the most part, United Way acts as a fundraiser for the community through workplace campaigns. Workplace campaigns are employer-sponsored programs offering employees the opportunity to make a charitable contribution at work. The employee can choose "payroll deduction" as a payment method, where the donations is deducted from the employee's paycheck, similar to other payroll deductions such as healthcare or taxes. This is very different than your typical nonprofit that depends on programs, services, direct mailers, events, etc. for funding, and is what made United Way the nonprofit of choice due to ease of giving - until now.

The Opportunities:
Since the 1960s, United Way relied on the ease of giving through payroll deduction and being able to support the entire community through one check, and failed to keep up with technology and younger donors entering the workforce. Now, United Way's value proposition is distorted as you can donate by text, online, social media platforms, etc. Payroll deductions are no longer the easiest way to give.

UWSJC's workplace campaigns have been on a downward trend the last several years as we have struggled with keeping up with technology, maintaining current donors, engaging with new donors, and strong brand recognition. Younger, tech-savvy donors embrace mobile and social giving trends while seniors still give heavily through direct mail. At the same time, the rapid speed at which people adopt new technologies is driving nonprofits to build multichannel strategies to engage these different generations of donors in the ways they like to be engaged. Our United Way has struggled to keep up. In addition, our lack of a tangible "product", direct program or service, but rather a county wide strategy to help more families thrive in our community through early learning, youth, and stable family initiatives, is difficult to "sell" to donors.

Opportunities:

- Work in collaboration with the VP of Mission Advancement to execute a year-round engagement plan focused on cultivation, solicitation and stewardship of existing, lapsed, and prospective donors.
- Work with UWSJC's new Communications Associate to develop a marketing and communication strategy to increase brand awareness and recognition that resonates with multigenerational donors.

- Redefine UWSJC's community strategy into a product that is easy to understand, support, and engage with year round.

Students taking this course will:

- Analyze a donor database to recognize trends in giving and develop strategies for engaging and retaining donors year round.
- Develop differentiated marketing tactics to cater to unique interests of each generation of supporters.
- Develop a product to satisfy a diverse customer base and crowded market.

Prerequisites:

Students with previous marketing experience, including product campaign experience, or those with a marketing concentration are ideal for this project. Students who enjoy the creativity behind transitioning existing methods into new innovative channels, should also enjoy this project.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:

This Immersion will be based in South Bend, IN on site at the UWSJC. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

STRATEGIES FOR SURVIVAL OF VOLUNTEER INCOME TAX ASSISTANCE (VITA)

United Way of St. Joseph County (South Bend, IN)
Laura Jensen, President & CEO
(M-Th, *daily times TBD*) / Max. 3 students

Background:
United Way of St. Joseph County (UWSJC) mission is to mobilize our community to collectively reduce poverty. Founded in 1914, UWSJC is a nonprofit organization dedicated to creating long-lasting change, ensuring all residents have access to the building blocks to a better life: education, income and health. UWSJC secures vital resources and builds multi-sector partnerships that support a broad array of critical health and human service needs in our community. We achieve results by working with more than 50 local agencies and over 12,000 donors, advocates and volunteers. UWSJC also operates several core programs that move people out of poverty and into economic self-sufficiency.

United Way's VITA sites provide free income tax-preparation services to households with an annual income of $66,000 or less a year and helps those who are eligible for EITC apply for them at no charge. The VITA sites are managed and staffed by United Way employees who also manage IRS certified VITA volunteer preparers. Sites are located at our United Way offices as well as libraries, schools, and other convenient locations throughout the community. Each year United Way helps thousands individuals file their taxes for free.

In addition to VITA, United Way World Wide partners with H&R Block to offer free online tax preparation for households with an annual income of $66,000 or less using MyFreeTaxes.com.
The VITA program is funded primarily in part by a federal grant. The IRS reviews the program bi-annually and determines the number of tax returns that need to be completed each year in order to continue to be eligible for funding the following year. Both VITA and MFT count towards the target number.

In 2017, our tax preparation program was highly successful, serving a record number of taxpayers (3,996 residing in five counties and 101 zip codes), saving them more than $900,000 in tax preparation fees and generating more than $1,200,000 in Earned Income Tax Credits for low-income families.

The Earned Income Tax Credit (EITC) was instituted to transition millions of families from welfare to work. The point was to make low-wage work pay because without the EITC, many families cannot earn enough to live. The Child Tax Credit (CTC) helps working families offset the cost of raising children.

The EITC and CTC greatly reduced poverty for working families, lifting about 6.5 million people out of poverty, including 3.3 million children (CBPP 2016). And by encouraging work, the EITC and CTC have had an additional anti-poverty effect not counted in these figures. Recent research on EITC's effects on single mothers' employment shows that counting the employment boosting effect of the EITC nearly doubles its anti-poverty effect for these families. These anti-poverty effects are particularly important since large numbers of taxpayers served by the VITA program work for low wages.

The Opportunities:
There are 2 challenges surrounding our 2020 tax season:

Challenge #1
H&R Block has notified United Way Worldwide that it will not fund MyFreeTaxes moving forward. For 2019 only, H&R Block will continue to make the MyFreeTaxes software available to United Way allowing us to offer MFT as free, safe and easy way for individuals or households earning less than $66,000 to file federal and state taxes.

United Way Worldwide will also continue to support this program in 2019, but with notable changes to the scope of support we are able to provide. United Way Worldwide will not offer subgrants, conduct any significant marketing activity, nor operate the traditional Helpline. In particular, the MyFreeTaxes Helpline will be replaced by a FAQ available on MyFreeTaxes.com.

H&R Block has assured United Way that the decision to discontinue funding was strictly an internal business decision, and not a reflection on 2018 performance.

United Way of St. Joseph County must now develop a new tax preparation strategy to offset the loss of the 2,000+ individuals filing through the MFT software in order to ensure we are meeting the target number of tax returns with the IRS grant.

Challenge #2:
UWSJC's VITA program is run by a dedicated group of volunteers who commit hundreds of hours throughout tax season. Our reliance on an aging group of volunteers has been identified by the IRS as a weakness of the program and they have encouraged us to engage and recruit new volunteers.

Should we not meet the number of tax returns required by the IRS, we risk renewal of the VITA program.

Opportunities:

- Develop new partnership opportunities locally to assist with free online completion of state and federal taxes should United Way Worldwide not secure a new national corporate partner.
- Establish a new pool of volunteers in order to increase the number of returns completed in person through VITA and offset the aging volunteer base.

Learning Outcomes:
By participating in these projects, students will learn to:

- Develop a contingency plan in order to maintain or restore critical programming and prevent future disruptions in service.
- Develop a path to volunteer engagement by understanding why people volunteer and how to appeal to their needs.

Prerequisites:
Registered students will work collaboratively across the two challenges. At least one team member with CPA or previous accounting experience is ideal, but not required.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This Immersion will be based in South Bend, IN on site at the UWSJC. Specific details on logistics and timing will be shared prior to the Monday, March 4 start.

TARGET AUDIENCE PROFILING & MARKETING STRATEGY DEVELOPMENT

Upstate (Raleigh, NC)
Kelly Garvy, Founder
(M-Th, *daily times TBD*) / Max. 4 students

Upstate is a lightning fast and super simple tracker for tracking state policy in the North Carolina General Assembly. They are focused on revolutionizing the way state legislation is tracked by constituents. Version 1 of their software allows individuals and businesses within the state of North Carolina to receive instant notifications when bills are updated. It provides users with the ability to set up custom alerts based on specific words and phrases in order to help ensure users have timely access to the right information.

Background on the Opportunity/Challenge:
Upstate is a software startup that builds tools to help the public, nonprofits and lobbyists track state legislation in the North Carolina General Assembly (NCGA). The NCGA is only in session from January 30th to July 7th (ish) this year. They will be rolling out our new tracker in March and they are looking for helping in driving sales through a lean marketing strategy. They plan to release new features in March, which will further enhance their value proposition and hopefully convert interested parties into customers. They need help further segmenting and targeting the different audiences they serve. They also need help better understanding how to connect with their customers and covert interested parties into paid users.

Students who enroll in this course will:

- Understand the importance of state government and its impact on individuals and local businesses.
- Get a feel for the workflow of lean, agile software product development.
- Gain a greater understanding of state legislatures and the industries that surround them.
- Gain a greater perspective on the legislative process.
- Utilize design thinking to arrive at resolutions.
- Gain insight into strategic decision making for companies serve a civic purpose.

Prerequisites:
This opportunity is open to everyone, but it would be particularly valuable for students that are interested in public policy and state government. It would also be particularly helpful if you're generally aware of how state political systems typically operate and the process they use to pass legislation.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in Raleigh, North Carolina. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.

MARKETING SUCCESS TO CSR PARTNERS

Waves For Water (Mendoza/South Bend, IN)
Robert McQueen, Field Operations Director
Janiece Marquez, Deputy Director – Clean Water Corps
Caitie Rowe, Global Operations Director
(M-Th, *daily times TBD*) / Max. 3 students

Background:
Waves For Water (W4W) works on the front lines to provide clean water to communities in need around the world. In addition to their primary focus of providing access to clean water, the organization has coordinated international strategic disaster relief initiatives, working directly with world leaders and strategic partners who take a no-nonsense attitude toward making global change.

Waves For Water's philosophy was born out of one simple idea: "Do what you love and help along the way." It's about following your heart and plugging purpose into your passion. They encourage people to look at humanitarianism as a lifestyle, rather than charity. It's a paradigm shift in the way we currently think–do what you love: sail, surf, bike, hike, etc–then insert purpose along the way. Not only does this create an incredibly unique and vital experience for the individual, it creates positive lasting impact in the world.

Waves For Water has implemented programs in 48 countries, with active programs in 23. They have responded to 33 disasters globally, implementing over 155 clean water programs globally - using water filtration systems (150,000), bore-hole wells, and rainwater harvesting systems. Since 2009 Waves For Water has impacted over 3,750,000 people. For our full story:
http://www.wavesforwater.org/about/story

The Opportunity:
Corporate Social Responsibility partnerships are core to Waves For Water's business model. We would like to find a way to present and market success cases from our current Corporate Social Responsibility (CSR) platforms (Nike, Hurley, Tumi, BMW) in an effort to attract more CSR partners. Critical to this is defining/quantifying the addition of purpose to the corporate environment with regards to KPI's and culture. We believe that is we can quantify the positive impact of our program, and the purpose it brings, it will be a critical component of our CSR engagement/marketing strategy.

Participants will get an insider look at our business model, approach to branding and strategic partnerships, and unique look at the humanitarian and non-profit landscape. This specific program will also have the opportunity to engage with select CEO's from some of our current CSR partners.

Students taking this course will:

- Work with an established but disruptive international Humanitarian Aid organization on a program that is totally unique to the humanitarian and travel spaces.
- See their efforts directly translate into humanitarian impact on a global scale:
- Take an in depth look at CSR programs and partnerships.
- Address business challenges for an international non-profit.
- Help with the development of global marketing strategies.

Prerequisites:
We are looking for the following key deliverables from this program, so students that can fill those requirements would be beneficial to our goals:

- Quantify / Define the impact of CSR programs / purpose on corporate performance and culture.
- Develop a marketing strategy and deck to build CSR partnerships specific to performance.

Logistics:
Staff of Waves For Water will be on-site at Mendoza through the week, so students can work from campus on this opportunity.

About:
Robert McQueen
Field Operations Director, Waves For Water (W4W)
After graduating from the University of Idaho, Rob's military career began as a Light Infantry Reconnaissance Platoon Leader and then Company Executive Officer with the 101st Airborne. Following his time at the 101st Rob commanded two special operations teams focusing on Counter Terrorism (CT) and Countering Violent Extremism (CVE) operations in Afghanistan and the Balkans. Rob has served worldwide in support of both named and contingency operations.

In addition to working with the United Nations, European Union, NATO, USAID and multiple NGO's on disaster response and stability operations, Rob has served as a subject matter expert and panelist on Counter Violent Extremism and combating the growing Foreign Fighter phenomenon for the National Counterterrorism Center. Rob has also been published on the influence of Disaster Response.

Janiece Marquez
Deputy Director Clean Water Corps
Janiece joined the United States Army in 2005, a career which is highlighted by two distinguished deployments to Afghanistan. First, a grueling 15-month tour in eastern Afghanistan in 2008-2009. Second, serving in Kunar province, with 3rd and 5th Special Forces Groups as a Cultural Support Team member conducting Village Stability Operations from 2011-2012.

After leaving the Army in 2012 Janiece founded Stable Outcomes, a stability operations startup operating in dynamic and complex environments. With Janiece as the CEO, Stable Outcomes consulted with South American security forces on military and police stability operations and aided in conducting counter-Ebola measures in remote areas of Liberia. Janiece personally worked in Ebola hot-zones delivering clean water to Liberia's most-affected villages and teaching villagers how to prevent the contraction and spread of Ebola.

Caitie Rowe
Global Operations Director, Waves For Water (W4W)
In her current role Caitie is responsible for implementing operational infrastructure for the organization's various teams on-site in multiple countries simultaneously. Beyond which, Caitie is responsible for brand management for the non-profit, manage long term partners and marketing initiatives and helping the global team maintain Waves For Water's brand voice and standards. When the non-profit responds to a natural disaster, Caitie's role expands to being the US-based ground control point person – including all internal and external communications, travel logistics, filter management, fundraising and budget planning.

Caitie cut her teeth at the internationally-renowned surf brand Hurley, where she started in 2013 at reception and swiftly moved up to be founder Bob Hurley's executive assistant, then Sports Marketing Coordinator and finally Global Brand Marketing Coordinator. It was while she was at Hurley that she acted as the brand's liaison with the non-profit, including relief missions Typhoon Haiyan and W4W Philippines and 100k World Water Day (W4W's largest single-day implementation to date). After "an

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emotional and eye opening implementation" in the Brazilian favela Jardim Gramacho Caitie decided it was time to focus her professional efforts full time on furthering Waves For Water's work, providing clean water to communities in need around the world, and formally joined the organization in 2016.

Originally from Orange County, CA, Caitie now calls New York City home when she's not on the road (in Brazil, Haiti, Mexico, Indonesia, Nepal, Philippines, South Africa, etc.) for Waves For Water.

SCALING UP COURIER PROGRAMS

Waves For Water (Mendoza/South Bend, IN)
Robert McQueen, Field Operations Director
Janiece Marquez, Deputy Director – Clean Water Corps
Caitie Rowe, Global Operations Director
(M-Th, *daily times TBD*) / Max. 3 students

Background:
Waves For Water (W4W) works on the front lines to provide clean water to communities in need around the world. In addition to their primary focus of providing access to clean water, the organization has coordinated international strategic disaster relief initiatives, working directly with world leaders and strategic partners who take a no-nonsense attitude toward making global change.

Waves For Water's philosophy was born out of one simple idea: "Do what you love and help along the way." It's about following your heart and plugging purpose into your passion. They encourage people to look at humanitarianism as a lifestyle, rather than charity. It's a paradigm shift in the way we currently think–do what you love: sail, surf, bike, hike, etc–then insert purpose along the way. Not only does this create an incredibly unique and vital experience for the individual, it creates positive lasting impact in the world.

Waves For Water has implemented programs in 48 countries, with active programs in 23. They have responded to 33 disasters globally, implementing over 155 clean water programs globally - using water filtration systems (150,000), bore-hole wells, and rainwater harvesting systems. Since 2009 Waves For Water has impacted over 3,750,000 people. For our full story: http://www.wavesforwater.org/about/story

The Opportunity:
We would like to look at refining, marketing and scaling Waves For Water's version of a volunteer program, the Courier Program.

The Courier Program is a direct extension of our philosophy and a great outlet for people as it gives travelers a real solution that they can implement during any trip. A solution that has a very measurable and tangible impact. The program is a platform to give people the tools to go do it themselves. We don't send people anywhere, it's more about each person creating their own travel experience; then crowdfunding on our site to buy filters for their trip. W4W provides the platform and serves as a resource of information and knowledge around the filter systems; and how they may go about distributing once they're on the ground. This is and has always been our philosophy - empowering people to take initiative, step outside their comfort zone, and create a unique experience for themselves. We believe that everyone can be a humanitarian this way.

We are averaging approximately 300 Couriers per year but feel this program has the potential to be Waves For Water lasting legacy. We have spent zero dollars or time marketing this program, any success has been through word of mouth and a few small (but effective) partnerships like Kandui Villas.

Ideally, we would like to take a look at the following:

- Refining the experience for the Courier, from the signup process, on the ground support, to retrieving feedback and content post trip.
- Marketing the program to our current, and a new audience of travelers, looking at new opportunities to leverage our current Media partnerships. We promote occasionally on our social channels but nothing massively creative or exciting.

- Scaling the program by targeting new and specific CSR partners with creative and innovative strategies to leverage their resources to provide as many people with access to clean water as possible.

The Courier Program has one goal: empower the masses to help solve the world water crisis. By piggybacking travelers that are already going to places with water needs, arming them with a water filter and the knowledge of how to implement it into a small community. While we want to scale the program, we want to stay true to our founding nature as adventurers, keeping it a DYI experience, and not making it a program where all the volunteers are wearing matching shirts, coming into save the day.

Students taking this course will:

- Work with an established but disruptive international Humanitarian Aid organization on a program that is totally unique to the humanitarian and travel spaces.
- See their efforts directly translate into humanitarian impact on a global scale:
- Address business challenges for an international non-profit.
- Help with the development of global marketing strategies.

Prerequisites:

We are looking for 3 key deliverables from this program, so students that can fill those requirements would be beneficial to our goals:

- Identify operational gaps and provide recommendations to prepare the program for scale.
- Develop marketing strategy to grow the user base.
- Develop a marketing strategy and deck to build CSR partnerships specific to the courier program.

Logistics:

Staff of Waves For Water will be on-site at Mendoza through the week, so students can work from campus on this opportunity.

About:

Robert McQueen
Field Operations Director, Waves For Water (W4W)

After graduating from the University of Idaho, Rob's military career began as a Light Infantry Reconnaissance Platoon Leader and then Company Executive Officer with the 101st Airborne. Following his time at the 101st Rob commanded two special operations teams focusing on Counter Terrorism (CT) and Countering Violent Extremism (CVE) operations in Afghanistan and the Balkans. Rob has served worldwide in support of both named and contingency operations.

In addition to working with the United Nations, European Union, NATO, USAID and multiple NGO's on disaster response and stability operations, Rob has served as a subject matter expert and panelist on Counter Violent Extremism and combating the growing Foreign Fighter phenomenon for the National Counterterrorism Center. Rob has also been published on the influence of Disaster Response.

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Deputy Director Clean Water Corps

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Caitie Rowe
Global Operations Director, Waves For Water (W4W)
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Caitie cut her teeth at the internationally-renowned surf brand Hurley, where she started in 2013 at reception and swiftly moved up to be founder Bob Hurley's executive assistant, then Sports Marketing Coordinator and finally Global Brand Marketing Coordinator. It was while she was at Hurley that she acted as the brand's liaison with the non-profit, including relief missions Typhoon Haiyan and W4W Philippines and 100k World Water Day (W4W's largest single-day implementation to date). After "an emotional and eye opening implementation" in the Brazilian favela Jardim Gramacho Caitie decided it was time to focus her professional efforts full time on furthering Waves For Water's work, providing clean water to communities in need around the world, and formally joined the organization in 2016.

Originally from Orange County, CA, Caitie now calls New York City home when she's not on the road (in Brazil, Haiti, Mexico, Indonesia, Nepal, Philippines, South Africa, etc.) for Waves For Water.

DESIGN ON-BOARDING PACKAGE FOR NEW BOARD MEMBERS

Youth INC (New York, NY)
Rehana Farrell, Executive Director
Angela Dorn, COO and General Counsel
Vanessa Marquez, Senior Associate Director of Marketing and Communications
(M-Th, *daily times TBD*) / Max. 4 students

Through the use of a unique venture philanthropy model that empowers, develops, and educates youth-centered organizations, Youth INC provides coaching, connections, and capital to help grassroots nonprofits achieve sustainable growth resulting in more lives changed. Since inception, Youth INC has raised $65 million for youth, empowered nearly 170 nonprofits, and impacted the lives of more than 220,000 youth.

Background on the Opportunity/Challenge:
The team will work with Youth INC Senior Leadership to develop and implement an onboarding packet for Youth INC's Board of Directors so that they may govern to the best of their abilities. The packet will also provide an in-depth view of our programming and fundraising efforts and provide essential information for Directors to serve as effective spokespeople and advocates of our important work. The students will work directly with Youth INC's Chief Operating Officer and General Counsel to create and implement a Board of Directors Onboarding Manual, which will be instrumental to our 2019 (and beyond) recruitment efforts. The students will also have an opportunity to re-engage more tenured board members and bolster their ability to spread awareness of their mission.

Students who enroll in this course will:

- Attain a deep understanding of nonprofit governance as well as best practices to recruit, inform, and engage Board of Directors.
- Engage with a wide-range of constituents and discuss their unique perspective on the nonprofit sector and the importance of supporting grassroots nonprofits focused on developing the social emotional intelligence of NYC youth.
- Understand how to develop an on-boarding process for new talent.

Prerequisites:

- This opportunity is open to students that have an affinity for mission-driven outcomes and youth-focused missions.
- Proficiency in Microsoft Suite.
- Attention to detail in a fast-paced environment.
- Design skills preferred but not mandatory.

PLEASE NOTE: Participants will be required to sign a non-disclosure project agreement regarding the handling of confidential information and intellectual property.

Logistics:
This "Interterm" Immersion will be based in New York, NY. **Students will need to secure transportation and lodging on their own.** Additional details on travel can be found under "Travel Reimbursement Details" at the front of this document.