Cohort Project Plan

Cohort 9



**The Cohort Project:**

 The scholars of the Goolsby Leadership Academy are challenged on an annual basis to create a presentation centered on ethical leadership in the modern business environment. Their task is to provide all necessary logistical planning and execution for the event, the speaker is arranged by the Academy. Cohort 9 is proud to welcome Lt. Gen. Rick Lynch USA (Ret.) as he presents on the topic of “Honor and Integrity.”

**Location, Time, Date:**

 The event is to be held Nov. 1st, commencing around 7:00 pm, at the Maverick Activities Center on the campus of The University of Texas at Arlington.

**Objectives:**

It is our hope that we might accomplish the following objectives:

* Successful completion of all tasks set before us by the faculty
* Defining of those tasks that will be necessary to complete our project and evolve those definitions as the project moves forward
* Exceed all previous attendance records
* Exceed all previous levels of interaction with organizations both outside and inside the UTA family
* Meet all necessary funding requirements – the project is to be funded entirely by the efforts of the cohort
* Rapidly develop necessary promotional materials to market the project
* Draw the members of the cohort into a cohesive and capable unit
* Gain real world experience in the tasks necessary to complete a project of this scope with minimal instruction
* Project completion with no legal or medical issues

**Project Organization:**

 It is our plan to organize the project into three departments:

* Logistics
* Marketing
* Financial

Each department is to define and delegate those tasks determined to be necessary to complete the project. Each department is to hold regular meetings, preferably on a weekly basis, to assess the state of those efforts.

**Project Leadership:**

 The cohort will be headed up by Billy Jones. As Primary POC within the cohort it is his ultimate duty to ensure all departments are completing the tasks that they have determined necessary, provide all interactions with faculty and persons outside the UTA family and see to the efficient completion of the project. The project will be completed solely by the scholars of Cohort 9 with department heads and members of those departments as follows:

* Hong Le – Logistics
	+ Members: Takara McGilbra, Kristen Loar, Veronica Hernandez, John Peake, Andrew Malkowski, Jonathan Lim, Jyoti Parekh, Tyler Reed, David Kiema
* Juan Farah – Marketing
	+ Members: Elizabeth Pfang, Lauren Craig, Mason Smart, Justen Woody, Yauheni Yakauleu, Glenroy Boatswain, Derrek Hampton, Jenny Ta, Nicolas Daniels, Brandon Briscoe, Victor Gonzalez
* Magan Vashisht – Financial
	+ Members: Jesse Wallace III, Tara Mulkey, Kate Zotina, Beverly Brenya, David Kiema, Tyler Peschka, Paige Tooley, Richard Cavagnolo

All department heads are to report to Billy Jones on the state of their departments as well as on any arising matters that need be addressed. All scholars will revert to the Logistics Department once the tasking of their own departments is completed – this is being done to ensure that, as the final run-up to the project commences, all personnel are available to complete whatever tasking may arise.

**Partners:**

For this project, we have been instructed to team up with the Maverick Battalion and The Leadership Center. As well, we have developed necessary relationships with the following:

* The College of Business Administration
* The Deans Office at the COBA
* The Department of Management
* The UTA Communications Department
* The MAC at UTA and Mr. Durl Rather
* The UTA Police Department/Chief Robert Hayes
* The Accounting Society
* The Shorthorn and UTA Radio
* The UTA Athletics Department
* Dave Davis and Gary Simonson from the College of Engineering

**Individual Scholar Assignments: \***

 All members of the cohort are to take an involved and proactive role in this project. Their duties are to be taken from the instruction of their department heads and they are to report directly to the department head any situations arising which would hinder the progress of the project. Individual assignments are as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| Jones | Billy | Primary POC | See above description |
| Le | Hong | Logistics - Lead | initial design of project, established goals for project, held weekly meetings for Logistics team, delegated duties and assigned leaders for specific task on the day of the event, location search for event, coordinated catering, assisted in selecting gift for General Lynch, processed sign in dbase into excel spreadsheet, created raffle ticket system, assisted Tyler Reed with his speech, layout and setup of event, audience seating, assisted with getting parking secured, helped set up the live feed, secondary POC/primary assistant to Billy Jones, ensured deadlines were created and kept, business card design, coordinated with all department heads, fielded questions from cohort and from faculty, laid out agenda/timeline for the day of the event, arranged duties for all cohort members for the day of the event to ensure all needs were met, problem communication to Billy, thank you notes to major contributors outside of the cohort, staffing for bake sale, spoke with professors to arrange extra credit, spoke with classes about the event,  |
| Hernandez | Veronica | Logistics | staffing for bake sale, baked goods donation, assisted with gift for General Lynch, coordinated signatures on gift for General Lynch, parking lot attendant, ushered guests at the event |
| Kiema | David | Logistics | parking lot attendant, sign-in assisting, rental of laptops |
| Lim | Jonathan | Logistics | assisted with gift for General Lynch, organized Burger Burn (although this event was not executed), parking lot attendant |
| Loar | Kristen | Logistics | design of raffle system, advertising through UTA Radio, staffing for bake sale, parking lot attendant,  |
| McGilbra | Takara | Logistics | parking lot attendant, staffing for bake sale, organized laptops for the sign in tables, organized sign in process |
| Malkowski | Andrew | Logistics | catering organization, coordination with Maverick Battalion, coordination with MAC personnel, parking lot attendant,  |
| Parekh | Jyoti | Logistics | organized gift for General Lynch, parking lot attendant, greeted guests and distributed raffle tickets |
| Peake | John | Logistics | bake sale staffing, parking lot attendee, POC to Maverick Battalion, arranged for posting of flags at the event, coordinated with faculty, worked with staff of the MAC, primary POC for UTA Communications, coordinated with The Shorthorn |
| Reed | Tyler | Logistics | designed Facebook page for event, staffing for bake sale, parking lot attendee, MC for the event |
| Farah | Juan | Marketing - Lead | Led the Marketing Department, coordinated all personnel therein, maintained all records of department and arranged necessary meetings, assisted in various positions on day of event as needed  |
| Briscoe | Brandon | Marketing | assisted with design for flyers and banner, helped stamp raffle tickets, helped fold programs, parking lot attendant, class presentations, donated baked goods to bake sale |
| Boatswain | Glenroy | Marketing | flyer and banner design, class presentations, sign-in sheet design, filmed the event |
| Craig | Lauren | Marketing | Early advertising, flyer design ideas, audience size improvement  |
| Daniels | Nicholas | Marketing | posted flyers, parking lot attendee, greeted guests, secured doors during event to avoid disruption |
| Gonzalez | Victor | Marketing | emailed organizations registered through MavOrgs, early morning parking attendant, greeted and directed guests,  |
| Hampton | Derrek | Marketing | audience size improvement, spoke with teachers to arrange extra credit stimulus to students and make class presentations, raffle ticket distribution/on-campus face to face advertising for event, parking lot attendee, greeted guests as they arrived and directed them to sign in, traffic control after event |
| Lopez | Nicolas | Marketing | aided Juan Farah in direction of marketing department, assisted with flyer design, staffing of bake sale, sent invitation emails to campus organization, parking lot attendee, worked with representatives from the Leadership Center during the event, greeted and directed guests on arrival, secured the main auditorium while the event was in progress to avoid disruption |
| Pfang | Elizabeth | Marketing | Design for flyer and banner, extra credit negotiation with professors, class presentations, promotional material distribution, parking lot attendance on the day of event, helped guests sign in, ushered guests to seats |
| Smart | Mason | Marketing | Shorthorn advertising and coverage of event, bake sale staffing, provided baked goods, assisted with sign-in, passed out raffle tickets |
| Ta | Jenny | Marketing | parking lot attendant, created raffle boxes, stapled business cards to raffle tickets, presented to classes, staffing for bake sale, hung flyers around campus, attempted coordination with Communications department, assisted with raffle ticket collections/drawing  |
| Woody | Justen | Marketing | placement of flyers and banner, parking lot attendant, greeted guests, gave out raffle tickets |
| Yakauleu | Yauheni | Marketing | flyer design, spoke with professors to arrange extra credit, created sign in dbase, parking lot attendee, worked with Mr. Sharp to arrange printing |
| Vashisht | Magan | Financial - Lead | Leadership of All Financial/Fundraising Personnel, scheduling of all necessary activities, weekly meetings, record keeping of all activities and progress, Kept all financial records, final financial reports, establishment of cohort checking account, etc. |
| Tooley | Paige | Financial | staffing for bake sale, baked goods donation, guest sign-in,  |
| Brenya | Beverly | Financial | Off-Campus fundraising, staffing for bake sale, parking lot attendee, collected donations during the event, sign in of guests |
| Cavagnolo | Richard | Financial | off-campus fundraising, extensive coordination with XTO Energy to obtain a sponsorship however this never came together, staffing for bake sale, donated baked goods, parking lot attendee, greeted and ushered guests to seats |
| Mulkey | Tara | Financial | off-campus fundraising, assisted with signing guests in, announced winning raffle tickets, parking lot attendant |
| Peschka | Tyler | Financial | off-campus fundraising, staffing of bake sale, coordinated volunteers from the Accounting Society in order to keep the Bake Sale open when no members of the cohort were available to staff it, parking lot attendee, event photographer |
| Wallace III | Jesse | Financial | on-campus fundraising, parking lot attendant, staffing for bake sale |
| Zotina | Kate | Financial | designed the flyers, banner, and business cards, off-campus fundraising, primary POC to Canon shop and Mr. Sharp, coordinated most print jobs, coordinated with professors to arrange extra credit, spoke to several classes to advertise event, program design, staffing of bake sale, donated goods to bake sale, early morning shift in parking lot, transferred sign in dBase to excel spreadsheet |

\* Note: Tasking and project assignments were highly modified as the project progressed; this list bears no chronological ordering or continuity of departmental tasking

**Caveats, Cohort Behavior, Standards:**

* All members of the cohort are to conduct themselves in a manner consistent with the standards expected of a scholar of the Goolsby Leadership Academy
* This applies at all times when representing the Academy both on and off campus
* All interactions with the public will be conducted in as professional and courteous a manner as possible,
* Should any problems arise while representing the Academy it is the scholars responsibility to inform their department head or Billy Jones as rapidly as is possible
* All interactions within the cohort are to be conducted with all due professional respect and in as business-like an atmosphere as is possible
* All financial transactions are to be conducted under the supervision of the signatories of the cohort account and with the oversight of Dr. Jim Quick
* All expenditures are to be approved (before they are incurred) by Magan Vashisht
	+ Unapproved expenditures may not be reimbursed if not properly approved
	+ No funds will be distributed without following the procedures laid out herein and those listed on the account information sheet
* The uniform for the day of the event will be the Goolsby polo shirt provided
* All necessary contact with the faculty or staff will be routed through Billy Jones
	+ This is being done in order to limit the numbers of people contacting individual staff members and to ensure that a unified message is presented to the staff at all times
* Dr. Jim Quick is the first faculty member in the chain of command
	+ All conflicts and issues are to be resolved at as low a level as possible
* No members of the cohort are to contact General Lynch without express permission and instruction
* All modifications to the event schedule will be routed through General Lynch for his first approval to ensure he is able to support said modification
* The Goolsby Leadership Academy, The College of Business Administration, and UTA bear no legal responsibility or insurance on the members of the cohort
	+ Cohort members will exercise all due care when operating motor vehicles and when exposing themselves to necessary and controlled risk in conjunction with this activity
	+ It is the responsibility of each and every member of the cohort to stop work and immediately notify the chain of command of situations that have become unnecessarily hazardous or that exposes the members of the cohort to undue harm or is being conducted in a manner which would reflect poorly on any associated organization
* For all situation not covered herein, contact your department head or Billy Jones immediately for direction