Cohort Project Evaluation

Cohort 9



**Abstract:**

 On November 1st, 2012 the Ninth Cohort of the Goolsby Leadership Academy, under the guidance of Dr. Jim Quick, proudly presented Lt. Gen. Rick Lynch, USA (Ret.) in a presentation entitled “Honor and Integrity” in the Lone Star Auditorium at the Maverick Activities Center at the University of Texas at Arlington. Cohort 9 performed all necessary logistical functions for this activity, from initial planning and research through final execution and close out on the day of the event. This event set a new benchmark within the Goolsby Leadership Academy in terms of partnering with outside organizations, acquiring corporate sponsorship and having 650 guests in attendance. It is our hope that the efforts of Cohort 9 will be exceeded by the future cohorts; that they would turn this annual project into an event that brings the message of the Goolsby Leadership Academy to the local community and encourages the student body of The University of Texas at Arlington to adhere to a higher standard in their education and future business dealings.

**Reflections from Cohort 9:**

 We set out on a different road for our project than that which has been used in the past. As a cohort, we decided from the first day of this assignment that we would turn the event into a shining example of the capabilities of the scholars of the Goolsby Leadership Academy. We knew that the best way to start planning was by setting an attendance goal, the most easily measureable metric for the event. While this number changed several times over the course of planning this event, we looked into this history of the Academy to find what had been achieved before. While the attendance records were relatively flat for the first several years of the event, Cohort 8 was able to more than double the previous attendance records – this sort of trend became our goal, one which we were very proud to achieve.

 As our planning moved forward, we realized that there was much more to this event than we could have ever anticipated. It was more than the mere act of bringing a group of people into a room to hear a presentation; our efforts began to gain their own spirit as the scholars poured more and more of themselves into this effort. We found that the sheer volume of work necessary to conduct the project took a disorganized group of people and forged them into a cohesive unit. Frequent meetings both on and off campus allowed us many opportunities to get to know each other as people outside of the College of Business setting. Fundraising efforts and struggles acquiring corporate sponsorship gave us a real world image of what it takes to get people to open their checkbooks in a constrained economy. We found out what it takes to trust people you have never worked with before, how hard it can be to divide a massive workload and know that the tasks will be accomplished.

 After so much effort marketing and planning this event and bringing all the last-minute details together, we were both relieved and stressed when November 1st finally arrived. While we worked hard to ensure that all the necessary details were in place we still had no idea what the end result of our efforts would be. Our attendance projections were just that – projections, and we had some concern as to how many guests would arrive. The auditorium filled more slowly than we would have liked, but just before the event began we had no less than 150 people waiting to sign. While we were forced to delay the start of the event, we were overjoyed to see how all the hard work had come together. Thanks to the dedication and sacrifice of persons both inside and outside the cohort, this event became a treasured memory that continues to resound amongst the halls of the COBA.

**Event Assessment**

**Areas of Success:**

* Early organization of the cohort into departments combined with establishing a distinct leadership structure gave us direction from the start, sped up the planning process, and allowed each scholar to find his or her niche from the beginning
* Securing General Lynch as our presenter was a huge boost to the credibility and image of the event
	+ Having a person of this caliber and experience as our speaker gave us a heightened sense of purpose and gave the event an invaluable air of authority
	+ Much effort went into finding a unique gift for General Lynch which enabled us to include a personal mark from those who participated in the event
* Coordination and cooperation within the cohort was absolutely critical, a complete lack of infighting and very enthusiastic participants meant that very little time had to be wasted dealing with matters outside the scope of the project
* Utilization of the Canon print shop, along with the logistical and financial assistance provided by Mr. James Sharp
* Establishing very high goals for the event at the very beginning meant much more focused efforts in obtaining those goals, all those involved knew we had set out to achieve a new record and acted accordingly
* Knowing that we were not to be funded by the Academy or the COBA, we had the mindset from the start to seek outside funding and find ways to generate funding for the event:
	+ This directly led to the Bake Sale - this represents the first time that the Academy has been able to utilize this resource
		- The Bake Sale was set up in such a way as to provide as aggressive a pricing structure as possible to compete with vending machines
		- Large variety of offerings at the Bake Sale drove sales well
		- Most items at the Bake Sale were donated by members of the cohort, resulting in a very high profit margin overall
	+ A ‘Burger Burn’ was scheduled but was not required due to the outstanding success of the Bake Sale
	+ Outside Corporate Sponsorship – For the first time in the history of the event, we acquired a corporate financial sponsor - EMD, Inc. of Wichita Falls, TX
	+ Generous support and donations from within the Academy and the COBA, particularly from the Deans Office, the Department of Management, and matching funds to our corporate sponsor organized by Dr. Quick
	+ Meticulous record keeping and monitoring of all movements of funds within the cohort account ensured absolute transparency of all financial transactions
* A strong marketing push from the very beginning led directly to the success of the event (it is hard to measure the success of any individual effort of the marketing department, however the turnout of the event cannot be overlooked, that record-breaking number was only possible because of the human effort in getting the word out):
	+ Intensive design of advertising materials (flyers, banners, business cards, etc.) along with utilizing the Department of Student Affairs’ graphic design personnel to review those designs provided eye-catching imagery
	+ Coordination with Student Governance to get our flyers posted and keep them posted (we found that some groups within the college have a tendency to remove postings in favor of their own)
	+ Advertising in the Shorthorn provided an instant method of reaching the entire UTA community along with giving us another internet presence
	+ Utilizing the UTA Communications Department provided contact to 30,000-40,000 people through their various mailing lists
* Enlisting the assistance of professors from within the COBA and in other colleges at UTA to provide extra credit to their students who attended the event was the *single most important factor* in driving audience numbers
* In-person presentations to every class with a willing professor got the word out more effectively than any other means, this combined with extra credit opportunities in those classes led to a truly captive audience
* A raffle system was put into place to increase motivation for attendance, all items therein were purchased from the funds raised by the cohort
* Assistance from our partners and various other organizations:
	+ The College of Business Administration
	+ The Deans Office at the COBA
	+ The Department of Management
	+ The Leadership Center
	+ The Maverick Battalion
	+ The MAC at UTA and Mr. Durl Rather
	+ The UTA Police Department/Chief Robert Hayes
	+ The Accounting Society
	+ The UTA Athletics department
	+ Dave Davis and Gary Simonson from the College of Engineering
* Aggressive use of social media such as Facebook combined with a web presence on multiple UTA servers allowed for marketing of the event to a market well beyond what we would have been able to reach in person
* Large discount provided by the Catering department allowed us to place a much more sufficient order so that more guests could be provided food
* Preparation of an overflow room equipped with a life A/V feed from the event ensured that no guests would have to be turned away
* Obtaining reserved parking for our guests ensured that no one who wished to attend would have trouble finding a place to park

**Areas Needing Improvement:**

* Early confusion as to how we were to proceed planning the event led to repeated revisions and restarts in the process
* Partnership with the Maverick Battalion was misunderstood on both sides, the Battalion did not know what there participation was to be and the cohort provided them very little guidance
* Partnership with the Leadership Center was established too late in the planning process to have real impact
* The event needs to be held in a single hall – having the event split into two areas led to multiple problems including having those people in the overflow room becoming distracted and not paying attention to the event
	+ Overflow room should have been organized into rows seating instead of table sweating, this would have provided a more business-like atmosphere and created less distraction
* Catering order was insufficient to the number of people in attendance
	+ Layout of food service area led to people moving very slowly, also aided in late start of the event
* Lots of wasted time in pursuing corporate sponsorships (e.g. XTO) that never materialized
* The parking area was not advertised in the marketing materials nor was it marked/signed, this led to our guests being unaware of where the parking was and underutilization of the parking we had reserved
* Many members of the cohort provided very little effort for the project, in part this was due to poor distribution of tasks by the department heads
	+ Department heads made the mistake of trying to shoulder too much of the workload on their own instead of proper delegation of tasks at hand
* Lighting and Audio in the Lone Star Auditorium should have been better rehearsed/staffed by personnel trained in the equipment to avoid the confusion we had in operating this equipment and trying to customize the very limited setup to our needs
* Sign-in of guests was bogged down severely at the start of the event, not enough laptops were available to get people through swiftly and a single stream process was used regardless if the guest was a student or not
* Both the Off-Campus and On-Campus Fundraising teams had limited success
	+ Follow up with potential sponsors was not rapid enough to ensure donations
	+ Pursuit of sponsors was too limited and not nearly aggressive enough to create results
* Stronger support was needed from within the cohort to properly staff the Bake Sale
* Written monetary control procedures need to be in place at all times when money is being handled so there is no question as to how to close out any fundraising activity or secure funds when donated
* Business cards were a total waste, we intended to use them to verify attendance through the duration of the event in order to apply extra credit, however this system was abandoned due to utter confusion amongst those in attendance
* Overprinting led to large amounts of waste (paper and money)
* General confusion on the day of the event, we never made a dry run through of the event and suffered accordingly

**Suggestions for Cohort 10**

* Get organized within the cohort early
* Keep a written, evolving project planning to speed the closeout process
* Try to keep the event in one hall
	+ try to get the Bluebonnet Ballroom reserved early if possible and then market your event to fill that space
* Ensure parking is advertised and signage in place to provide full utilization of that resource
* Use some sort of dbase sign in process
	+ Ensure said dbase exports directly to a spreadsheet to avoid a long process of cleaning up the list
	+ Create separate sign in processes for students as opposed to non-students
* Attempt to get at least one member of the cohort excused from the Goolsby class so that they can supervise the Bake Sale
* Potentially arrange for two Bake Sales so that your funding is close to complete without outside assistance
* Bake Sale is controlled by the Business Constituency Council
	+ Ensure that a week is reserved for the Bake Sale as quickly as possible, these slots disappear rapidly
* Establish written procedure for presenting to potential sponsors as well as how funds will be collected
* Establish how you will compensate your sponsors (e.g. advertising) as early as possible
* Limit your on-campus fundraising efforts, there is no money to be had as those organizations are on very constrained budgets themselves
	+ Look for corporate sponsors with family relations, etc.
* Target UTA Bookstore (early!) for some sort of sponsorship
* Aggressive use of social media
* Rehearse the layout of food service to ensure streamlined service and limited area for guests to dawdle
* Rehearse the event and take a dry run to ensure that all people know their tasks before hand