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MBA Capstone Students Focus on Process, People and Technology to Develop Recommendations for Not-for-Profit Organization

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ABSTRACT

In an effort to promote engagement with organizations in the not-for-profit sector, Molloy College's graduate business program includes an experiential learning component. Prospective graduates of the MBA program are required to complete a rigorous Capstone course, through which students provide consulting services to a not-for-profit organization. Tasked with finding solutions to real problems, the students must apply their cross-disciplinary knowledge and skills to develop a comprehensive proposal for their clients. In one short seven-week semester, class members must form teams with fellow students, meet their clients, assess the problems presented and develop comprehensive proposals.

This paper describes the consulting project undertaken by a team of Fall 2020 MBA students, as well as the local not-for-profit organization and its challenges.

Keywords

Education, consulting, not-for-profit, operations, marketing, social responsibility

1 PEDAGOGICAL PHILOSOPHY

Molloy College's mission is rooted in the Dominican tradition of study, spirituality, service and community, and this is reflected in the courses that comprise the MBA program. All students in the graduate business program must complete a business ethics course as well as a Capstone course.

The Capstone program at Molloy College was designed by faculty using a model similar to Mayors Challenge framework developed originally by Bloomberg Philanthropies (2021 Global Mayors Challenge | Bloomberg Cities, n.d.). Capstone course professors identify a not-for-profit organization that could benefit from the analytical work and recommendations of graduate students. The professor and the client work together to identify a specific problem that the students can address. At the first class, the client presents the problem to the students and a discussion ensues. Following this meeting, the team of students conducts research to better understand the problem and identify potential solutions. By the end of the semester, the team develops a proposal for its client that describes the research conducted by team members, the recommendations of the team and the steps the client needs to take to fully implement the recommendations. Students formally present their work to the client at the end of the semester.

This paper summarizes the work and challenges faced by members of one Fall 2020 MBA Capstone team that began the seven-session semester in early November. Classes were held weekly in an online synchronous format using Zoom. Formative and summative assessments, in the form of documents, presentations and reflections, were used to evaluate student learning.

2 THE CLIENT and THE CONSULTING PROBLEM

Community Cares is a social service agency that operates multiple programs for people in need across Long Island and New York City. (Note: For confidentiality reasons, the name of the organization has been changed in this paper to Community Cares.) The organization's mission is to respond to human needs with programs that protect children, promote healthy families and communities, help seniors, empower individuals, and improve lives. Community Cares aspires to reach individuals throughout local communities with innovative programs designed to improve quality of life.

A major component of Community Cares's array of services is a program called Supervised Visitation (SV). (Community Cares operates multiple SV programs; the program we engaged with will be referred to as NSV.) Supervised Visitation provides a safe and secure environment for non-custodial parents to meet with their children under court orders. The goal of these visitations is to normalize and strengthen parent-child relationships. NSV helps establish boundaries within these relationships, ultimately providing judges with the information necessary to determine legal next steps.

Community Cares determined that its NSV program required process improvements and the Program Director expressed the need for solutions to various budgetary, technological, and staffing dilemmas to increase efficiency and reduce time spent on repetitive tasks. NSV relied heavily on paper files, which required scarce administrative resources to maintain. Furthermore, NSV did not have an effective client management system in place to assist with scheduling, interviewing and reporting.

The main problem NSV faced was operational inefficiency. The Program Director often spent a significant amount of time reviewing the handwritten notes of Visitation Specialists and typing reports for the court. Furthermore, the time required to complete written observations and corresponding reports varied for each individual case. The program would greatly benefit from a more digitized, streamlined, and structured approach but faced several challenges, including a constrained budget. Due to the lack of funding for process optimization, all internal NSV tasks needed to be completed with limited resources. The COVID-19 pandemic exacerbated these issues, as New York State courts were intermittently closed, and in-person supervised visitations were restricted. NSV did not have the funds to hire additional staff or purchase a computerized system, so creative solutions that could be realistically implemented were required. By implementing technology-oriented strategic solutions to these operational roadblocks, NSV could run more efficiently, increase its clientele capacity, and ultimately create opportunities for future revenues.

As such, Community Cares turned to the MBA Capstone students at Molloy for help. Students in the capstone program were assigned to teams, one of which named itself Track M Strategies. During the first class of the semester, the NSV Program Director met with Track M Strategies to introduce the NSV program and its operational challenges.

3 SWOT ANALYSIS

Track M Strategies began by conducting a SWOT analysis to inform its strategic recommendations. The team identified the dedicated, empathetic and people-centric employees (one program director and five part-time staff) as one of the primary strengths of the NSV program. Additional strengths included NSV's relationship with the New York court system, the adaptability of the program during the COVID-19 pandemic, and the image of the program in the eyes of the public. At the same time, funding shortages were a weakness; the NSV program was understaffed, and technology utilization was minimal. Track M Strategies identified several opportunities for the NSV program, such as (1) capture and store client information electronically, (2) continue facilitating virtual visitations, and (3) develop an internship program with local colleges. Identified threats included macroeconomic trends that could result in decreased revenue from grants and donations for Community Cares and the NSV program.

4 RECOMMENDATIONS

Track M Strategies approached the operational inefficiency problem by analyzing three key components: process, people and technology.

4.1 Process

Tasked with optimizing workflow processes, Track M Strategies faced the challenge of providing NSV staff with the proper tools and templates. This included providing guidance on how to actually implement the proposed solutions. Strategic solutions were necessary to both satisfy the needs of the program and be simple enough for staff to easily adopt.

To begin, Track M Strategies reviewed the visitation and scheduling processes to determine areas where NSV could potentially save time. Next, the team created a flow chart based on current processes to better understand the sequence of tasks and then included adjustments that could optimize each process. Track M Strategies also redesigned NSV's scheduling spreadsheet template to incorporate attendance, client information, payment statuses, and other metrics to allow staff to access information easily and quickly. Finally, Track M Strategies developed a series of training videos for each proposed solution using Loom, a free video recording service.

Track M Strategies also prioritized the development of a more efficient system that Community Cares could use to track client behaviors and their progress over longer periods of time. After conducting research, Track M Strategies curated a list of observations that are commonly documented during supervised visitations. Using Google Forms, Track M Strategies created

forms that digitized and optimized input and readability of observation data. This would allow Visitation Specialist staff to easily indicate the presence or absence of important behaviors using a 9-item Likert scale; electronically store reports; and quickly access the information when needed. Finally, Track M Strategies created a Google Drive for NSV to easily store and access electronic documents.

Additionally, Track M Strategies created an exit survey using Google Forms that parents could complete upon leaving the NSV program. Using a 5-item Likert scale, parents were asked to indicate whether they agreed or disagreed with various aspects of the program. Sample items included “The visitation space was private and secure” and “I felt comfortable while visiting with my child.” Upon implementation of these surveys, NSV staff could track and analyze key metrics.

4.2 People

The NSV program facilitates court-ordered visitations for families while maintaining a staff of five part-time employees. This limits scheduling availability and client capacity. Track M Strategies established relationships with targeted faculty at Molloy College to develop an internship pipeline that funnels students to NSV. In particular, Track M Strategies created job descriptions for the positions of Visitation Specialist Intern and Operations Intern, along with a contact and scheduling template to manage job postings. Track M Strategies also developed an interview process that included a set of interview questions to help find the highest quality candidate. In an effort to promote the internship program, Track M Strategies crafted social media posts with graphics.

The program could potentially offer students internship credit for their work, incentivizing participation in the program. Furthermore, Track M Strategies developed a structured outreach plan so that NSV could expand its internship pipeline to other local colleges and universities. The team drafted outreach letters, created a local contact and job posting spreadsheet, and identified guidelines for social media advertisements to make for a smooth implementation.

4.3 Technology

It is essential to identify, quantify, and establish methods of recording client progression or regression in order to implement changes and continually improve NSV’s offerings. The COVID-19 pandemic has reduced NSV’s stream of reliable funding, hindering its ability to implement our proposals. However, the cost of investing in process optimization is low, so a grassroots, crowd-funded donation drive through digital marketing efforts may be able to cover the associated costs.

NSV staff collected client information using multiple Excel spreadsheets. It was difficult for NSV staff to quickly locate and analyze data regarding client information under this system. Minimal modifications to the current methods could result in significant time savings. As such, Track M Strategies reformatted the current “master spreadsheet” to increase accessibility and make it more manageable. Due to concerns regarding NSV staff’s proficiency manipulating spreadsheets, Track M Strategies integrated design improvements such as frozen rows and columns for longer data entries, borders and color schemes to distinguish between data entries more clearly, and drop-down menus for quickly inputting common information.

Using elements from the new observation form, Track M Strategies created a Composite Progress Index and an Individual Progress Index. The Composite Progress Index workbook contains a sheet titled “Form Responses” that automatically populates with Observation Form submissions; data from every visit will be instantly compiled in a single location. NSV staff can then filter the form submissions based on client name or Visitation Specialist, then transferring the observation data into the Individual Progress Index. The Composite Progress Index contains all NSV form responses and provides greater insight to the program as a whole. The Individual Progress Index, on the other hand, provides insights and trends for a particular client. The Individual Progress Index becomes increasingly useful for clients who have longer periods of time between court hearings, since the information from each session is clearly organized and outlined. The current system for collating court reports requires the Program Director to transpose dozens of pages of handwritten notes across several visits into concise summaries. Under our new system, all form responses can be clearly outlined in the Progress Index so that relevant identifying information is more accessible. The data gathered from visitation sessions can be combined and over time a visualization of progress can be developed. By collecting and quantifying large swaths of observation data, NSV can more easily assess the efficacy of its offerings and determine whether and where improvements can be made.

Successfully financing proposed solutions via a crowd-funded campaign (e.g., on a platform like GoFundMe) relies on the ability to effectively engage target audiences. Doing so requires messaging that is both true to Community Cares’s brand and appeals to people’s emotions; appealing to emotions can boost the likelihood that someone donates (Jha, 2016). Therefore, Track M Strategies conducted a brand audit of Community Cares. This included defining the color palette and associating these colors with correlating feelings and preconceived notions (Kolowich, 2017). Track M Strategies met with the Director of Community Engagement & Partnerships at Community Cares to refine the campaign’s message, generate relevant graphics, and create a GoFundMe page that accurately encapsulated both the Community Cares brand and an emotional, descriptive appeal to potential donors.

Track M Strategies devised a fundraising marketing strategy that targeted thousands of local residents on Long Island without spending a single dollar; this marketing methodology is known as guerilla marketing (Hayes, 2019). Track M Strategies created a GoFundMe online fundraiser specifically directed toward improving the NSV program's technological capabilities. Track M Strategies identified several high-engagement groups on both Facebook and LinkedIn, including communities, alumni associations, and fraternity networks; the total number of users across the groups exceeded 20,000. In addition, Track M Strategies collaborated with other Molloy Capstone students to further spread the campaign message across personal Facebook, LinkedIn, Instagram, Twitter, and Snapchat accounts. Finally, Track M Strategies shared the campaign family and friends, a group that was highly supportive.

Track M Strategies created and implemented a fundraising campaign on GoFundMe to raise funds so that NSV could afford tech-based strategic solutions. The team raised \$1,210 over three weeks, surpassing the original goal of \$1,000. Team members tracked and analyzed the efficacy of the fundraising campaign. While the fundraising "ask" was "\$10 Brings Families Back Together," the average donation amount was \$35. Family and friends were the audience with the highest conversion and sharing rate. In the past year, donations to nonprofit organizations were up 4% and online donations were up 12% (Double the Donation, 2020). Track M Strategies recommends that Community Cares continue online fundraising efforts using low-cost strategies similar to that demonstrated by the GoFundMe campaign.

Since some of the proposed solutions required the integration of technology throughout NSV's processes, Track M Strategies identified four Google Chromebooks that NSV staff could use that balanced affordability and quality: (1) Lenovo Chromebook S330 (\$239.99), (2) Acer Chromebook Spin 311 Convertible Laptop (\$269.99), (3) Samsung Chromebook 3 (\$271.99), and (4) Lenovo Chromebook Duet 2-in-1 (\$272.00). Track M Strategies proposed that NSV use the funds from the GoFundMe campaign to purchase three Chromebooks for NSV staff.

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