



# THE OHIO STATE UNIVERSITY

JOHN GLENN SCHOOL OF PUBLIC AFFAIRS

## PUBAFRS 5800

### Marketing for Nonprofit and Public Organizations

Spring 2014

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**Date/Time:** Tuesday, 5:30–8:10 p.m.

**Classroom:** Mendenhall Lab 0173

**Credit hours:** 3

**Prerequisites:** PUBAFRS 3140 is required for undergraduate students; PUBAFRS 7553 is recommended for graduate students

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#### COURSE DESCRIPTION

This course will examine the marketing principles of mission-driven organizations, specifically nonprofits and government agencies. Marketing is one tool available to managers to improve organizational performance and encourage effective communication to stakeholders. However, public and nonprofit marketers face unique marketing challenges – from deficient resources for adequately addressing marketing needs to a general lack of understanding of the power of marketing.

The course will address these and other challenges of nonprofit and public sector marketers, providing students with an introduction to marketing theory. It will also equip students with practical experience in developing a strategic marketing plan, influencing the attitudes and behaviors of diverse stakeholders, leveraging social media and other emerging technologies, and other skills relevant to nonprofit and public sector marketers.

#### LEARNING OBJECTIVES

Upon successful completion of this course students will:

- Identify the goals and objectives of marketing for mission-driven organizations from a theoretical and practical perspective
- Demonstrate the strategies and tactics of nonprofit and public sector marketing through discussion, case study, small group analysis, interaction with guest speakers, and assignments
- Apply their knowledge of marketing by utilizing planning and implementation tools to improve organizational performance

## TEXTS

Kotler, P., and A. Andreasen. 2008. *Strategic Marketing for Nonprofit Organizations*. Upper Saddle River, NJ. 7th Edition. Prentice Hall, Inc. ISBN: 013175372X.

*Students can access textbook information via the Barnes & Noble bookstore website ([www.shopOhioState.com](http://www.shopOhioState.com)) as well as from their BuckeyeLink Student Center. This information is disseminated by B&N to all area bookstores. You may buy from a store of your choice and/or shop for books (always use ISBN# for searches) on line.*

The *Harvard Business Review* case studies listed below can be purchased online at <http://hbr.org/case-studies> by entering the case study numbers. The case studies are delivered as PDFs and typically cost \$6.95.

1. The Toronto Ultimate Club; Richard Ivey School of Business Foundation; 10/22/2009, Product#: 909A29-PDF-ENG
2. The American Repertory Theater; Harvard Business School; 10/05/2011, Product#: 512026-PDF-ENG
3. United Way of Massachusetts Bay; Harvard Business School Case Study; 10/08/1998, Product#: 9-599-042
4. Hurricane Island Outward Bound School; Harvard Business School Case Study; 10/09/1987, Product#: 9-588-019
5. American Legacy: Beyond the Truth Campaign; Harvard Business School Case Study; 10/06/2003, Product#: 9-504-014
6. Habitat for Humanity International: Brand Valuation; Harvard Business School Case Study; 06/30/2003, Product#: 9-503-101
7. CARE USA; Harvard Business School Case Study; 07/14/2003, Product#: 9-504-007
8. The Aravind Eye Hospital, Madurai, India: In Service for Sight; Harvard Business School Case Study; 04/01/1993, Product#: 9-593-098

Additional readings and case studies posted online via Carmen.

## GRADING AND ASSIGNMENTS

Class Participation 10%

Case Study Outlines 5%

Case Study Analysis 10%

Midterm Examination 25%

Marketing Plan 50%

### Notes:

- *The class participation grade includes both regular attendance and active engagement in class discussion. Missing more than one class and/or failing to participate in class will negatively impact student grades.*
- *Graduate students taking the class will be expected to take on more of a leadership role in class discussion and case study presentation.*

*Additionally, the instructor will provide a writing rubric for all assignments which will include a higher level of rigor for graduate student performance.*

### **Case Studies**

The course relies on case studies to provide insight into real-world challenges faced by managers in the public and nonprofit sectors. Cases are generally written to contain background information on the organization, objective of the activity, people involved, and a series of events and administrative difficulties that confront the responsible manager.

At the beginning of the course, students will select one case study (no more than 2 students per week for each case study) and write a 10-page (single-spaced) case analysis that will (1) identify the primary challenge facing the case protagonist(s); (2) provide a critical assessment of the situation; (3) issue a persuasive argument supporting a recommended course of action that leverages marketing strategies and tactics; (4) connect the problem and/or topic to course concepts. Students who write the full case analysis will be responsible for leading class discussion on the case, and the instructor expects graduate students to assume more of a leadership role in these discussions.

Students not writing the full case study analysis for that week will draft a 1–2 page (single-spaced) bulleted outline of the case, covering the four elements described above. The cases will be reviewed in class for deeper group discussion and commentary, led by the students who have completed the full case analysis.

### **Midterm Examination**

Students will take a midterm exam covering all assigned material, including readings, lectures, and discussion, up to the day of the exam. The format may include short answer and essay questions. The exam will also include an essay question focusing on item #2 from the Marketing Plan assignment, as a way to ensure appropriate backgrounding and initial drafting of content, as well as check progress on the plan at the midpoint of the semester.

### **Marketing Plan**

The primary deliverable for this course is a 10-page single-spaced marketing plan, organized with callouts, visuals, columns, and other design elements that enhance readability and professionalism of the final product. Students will prepare a marketing plan for a nonprofit organization or government agency of their choice, or a new entity yet to be formed. By the midpoint of the semester, students must select their organization and be prepared to provide draft content responding to item #2 below, as one among several essay questions on the midterm exam. The final marketing plan should include the following elements, informed by instructor feedback provided on the midterm:

1. Establish mission and vision statements for your new organization or offer fine-tuning edits if choosing an existing organization; briefly describe basic services provided.
2. Analyze its organizational environments and situation
  - a. Internal environments
    - i. Review organizational goals and objectives
    - ii. Describe the organizational culture you seek to establish
  - b. External analysis
    - i. List and briefly describe all organizational publics/audiences including its clients, donors, volunteers, board members and others
    - ii. Describe the competition faced by your organization (research similar local nonprofit and for-profit organizations operating in the same service area)
    - iii. Point out various aspects of the current macroeconomic situation and how they may affect your organization.
3. Formulate core marketing strategy (e.g., new markets? new offerings?)
4. Describe marketing research needed to gain an understanding of how the target audience(s) makes decisions about changing their behavior according to organizational desires. Based on common sense and any online information you can find, make preliminary assumptions about the *character of their decision-making* (e.g., who are the decision-makers? How, when, where, and why do these potential consumers use or may use your services?), *latest trends in demand* (is the demand for services growing or declining?) and *social, cultural, and economic characteristics* of consumers.
5. Based on market research, provide a rationale for market segmentation
6. Develop a brand for the organization (name, guidance to inform logo design, detailed positioning messages including brand promise and story)
7. Describe marketing mix (product, price, place, promotion)
  - a. Product: Are you planning on developing a new product or improving the style, or packaging of your current product? What sources of data will you consider to guide your ideas for a new product?
  - b. Price: What pricing techniques will you use?
  - c. Place: Based on the character of your offering and the traits of your target audiences, how will you be reaching your audiences?
  - d. Promotion: what messages would you want to send and what media would you use?
8. Plan for assessing the effectiveness of marketing activities
9. Describe implementation plan (responsibilities, tasks, and timeline).

**Grading Scale**

93 - 100	A	80 - 82	B-	68 - 69	D+
90 - 92	A-	78 - 79	C+	64 - 67	D
88 - 89	B+	73 - 77	C	63 & below	E
83 - 87	B	70 - 72	C-		

## **COURSE POLICIES**

### ***Academic Integrity***

It is the responsibility of the Committee on Academic Misconduct to investigate or establish procedures for the investigation of all reported cases of student academic misconduct. The term “academic misconduct” includes all forms of student academic misconduct wherever committed; illustrated by, but not limited to, cases of plagiarism and dishonest practices in connection with examinations. Instructors shall report all instances of alleged academic misconduct to the committee (Faculty Rule 3335-5-487). For additional information, see the Code of Student Conduct ([http://studentaffairs.osu.edu/info\\_for\\_students/csc.asp](http://studentaffairs.osu.edu/info_for_students/csc.asp)).

### ***Disability Services***

Students with disabilities that have been certified by the Office for Disability Services will be appropriately accommodated. Students should inform the instructor as soon as possible of their needs.

The Office for Disability Services is located in 150 Pomerene Hall, 1760 Neil Avenue; telephone 292-3307, TDD 292-0901; <http://www.ods.ohio-state.edu/>.

## COURSE OUTLINE

<b>Date</b>	<b>Lecture Topics, Readings Due, &amp; In-Class Discussion for This Week</b>
Week 1 1/7/14	<p><b><u>Lecture:</u></b> Course introduction, review of the syllabus, introduction to nonprofit and public sector marketing</p> <p><b><u>Case Study Model &amp; In-Class Discussion Topic:</u></b> The Pittsburgh Promise (lecturer will review the case and model analysis process in class)</p>
Week 2 1/14/14	<p><b><u>Lecture:</u></b> Marketing and mission-based organizations, increasing importance of marketing in the nonprofit and public sector, strategic marketing process</p> <p><b><u>Case Study Reading with Analysis or Outline &amp; In-Class Discussion Topic:</u></b> HBR Case Study #1 (The Toronto Ultimate Club)</p> <p><b><u>Text Readings:</u></b> Kotler and Andreasen, Chapters 1 (The Growth and Development of Nonprofit Marketing) and 2 (Developing a Target Audience-Centered Mindset)</p>
Week 3 1/21/14	<p><b><u>Lecture:</u></b> Market research; finding target audience, mission and vision audit, setting objectives</p> <p><b><u>Case Study Reading with Analysis or Outline &amp; In-Class Discussion Topic:</u></b> HBR Case Study #2 (The American Repertory Theater)</p> <p><b><u>Text Readings:</u></b> Kotler and Andreasen, Chapters 3 (Strategic Marketing Planning), 4 (Understanding Target Audience Behavior), and 5 (Acquiring and Using Marketing Information)</p>
Week 4 1/28/14	<p><b><u>Lecture:</u></b> Segmentation, marketing, branding</p> <p><b><u>Guest Lecturer:</u></b> Erica Reetz, Senior Marketing Specialist, Battelle for Kids <i>Students must review resources provided by lecturer and prepare questions for speaker in advance of class.</i></p> <p><b><u>Text Readings:</u></b> Kotler and Andreasen, Chapters 6 (Segmentation, Targeting, and Positioning) and 7 (Branding)</p>

<b>Date</b>	<b>Lecture Topics, Readings Due, &amp; In-Class Discussion for This Week</b>
Week 5 2/4/14	<p><b><u>Lecture:</u></b> Marketing mix: Product offerings, developing programs and services</p> <p><b><u>Case Study Reading with Analysis or Outline &amp; In-Class Discussion Topic:</u></b> HBR Case Study #3 (United Way of Massachusetts Bay)</p> <p><b><u>Text Readings:</u></b> Kotler and Andreasen, Chapters 8 (Value Propositions: Managing the Organization's Offerings), 9 (Developing and Launching New Offerings), and 10 (Managing Perceived Costs)</p>
Week 6 2/11/14	<p><b><u>Lecture:</u></b> Marketing mix: Price, place, incentives, distribution channels</p> <p><b><u>Case Study Reading with Analysis or Outline &amp; In-Class Discussion Topic:</u></b> HBR Case Study #4 (Hurricane Island Outward Bound School)</p> <p><b><u>Text Readings:</u></b> Kotler and Andreasen, Chapters 11 (Facilitating Marketing Behaviors) and 12 (Formulating Communication Strategies)</p>
Week 7 2/18/14	<p><b><u>Lecture:</u></b> Marketing mix: Promotion and persuasion, advertising, messaging</p> <p><b><u>Case Study Reading with Analysis or Outline &amp; In-Class Discussion Topic:</u></b> HBR Case Study #5 (American Legacy: Beyond the Truth Campaign)</p> <p><b><u>Text Readings:</u></b> Kotler and Andreasen, Chapters 13 (Managing Communications: Advertising and Personal Persuasion) and 14 (Managing Public Media and Public Advocacy)</p>
Week 8 2/25/14	<b>Midterm examination</b>

<b>Date</b>	<b>Lecture Topics, Readings Due, &amp; In-Class Discussion for This Week</b>
Week 9 3/4/14	<p><b>Lecture:</b> Budgeting for marketing, grant writing and fundraising, partnerships</p> <p><b>Case Study Reading with Analysis or Outline &amp; In-Class Discussion Topic:</b> HBR Case Study #6 (Habitat for Humanity International: Brand Valuation)</p> <p><b>Text Readings:</b> Kotler and Andreasen, Chapter 15 (Generating Funds)</p> <p><b>NO CLASS ON 3/11/14: SPRING BREAK</b></p>
Week 10 3/18/14	<p><b>Lecture:</b> Ethics in marketing</p> <p><b>In-Class Group Discussion Topic:</b> Using the <a href="#">American Marketing Association</a> and <a href="#">Public Relations Society of America</a> Codes of Ethics in Various Real-Life Scenarios</p> <p><b>Text Readings:</b> Kotler and Andreasen, Chapters 17 (Working with the Private Sector) and 18 (Organizing for Implementation)</p>
Week 11 3/25/14	<p><b>Lecture:</b> Leveraging volunteers, utilizing internal resources, networks</p> <p><b>Case Study Reading with Analysis or Outline &amp; In-Class Discussion Topic:</b> HBR Case Study #7 (CARE USA)</p> <p><b>Text Readings:</b> Kotler and Andreasen, Chapter 16 (Attracting Human Resources: Staff, Volunteers, and Board Members)</p>
Week 12 4/1/14	<p><b>Lecture:</b> Social media, video, gamification and emerging technologies</p> <p><b>Guest Lecturers:</b> Anthony Trimpe, Longstride Jeremy Hughes, Elevate Pictures <i>Students must review resources provided by lecturer and prepare questions for speaker in advance of class.</i></p> <p><b>To View Prior to Class:</b> Bill &amp; Melinda Gates Foundation: <a href="#">Reinvent the Toilet</a> The Red Thread Promise/Tell Collective: <a href="#">Haiti Film</a> Ronald McDonald House Charities/Longstride: <a href="#">Vehicle Donation Campaign</a> Flying Horse Farms/Longstride: <a href="#">Camp Life Video</a></p>

Date	Lecture Topics, Readings Due, & In-Class Discussion for This Week
Week 13 4/8/14	<p><b><u>Lecture:</u></b> Managing public relations, communications</p> <p><b><u>Case Study Reading with Analysis or Outline &amp; In-Class Discussion Topic:</u></b> HBR Case Study #8 (The Aravind Eye Hospital, Madurai, India)</p>
Week 14 4/15/14	<p><b><u>Lecture:</u></b> Evaluation, monitoring and control</p> <p><b><u>In-Class Group Discussion Topic:</u></b> Bringing together what you've learned: Critiquing real marketing plan.</p> <p><b><u>Text Readings:</u></b> Kotler and Andreasen, Chapter 19 (Marketing, Evaluation, Monitoring, and Control)</p> <p><b><u>Other Readings:</u></b> Samples of real marketing plans on Carmen.</p>
Week 15 4/23/14	<p><b>Due: Marketing plan</b> (The plan is due at the start time of the course's final exam: Wednesday, 4/23/14, 8:00pm.)</p>

SAMPLE