LIVE CASE STUDIES IN ORGANIZATIONAL CHANGE: LEARNING ABOUT CHANGE THROUGH STUDENT PHILANTHROPY AND SERVICE-LEARNING

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Abstract

Students in an undergraduate course on Managing Change participated in a philanthropy service-learning project with local non-profit organizations to: (1) learn about the organizations, (2) help the organizations create grant proposals, (3) create plans for desired changes in the organizations, and (4) award grants to the organizations. To create recommendations for change, students had to gather information about the organizations that would be provided by the author in a traditional case. These live case studies helped the students to see that real organizational change is ambiguous, complicated, and challenging.

KEY WORDS: Service-learning, management, philanthropy, organizational change, undergraduate education

INTRODUCTION

The Managing Change course at Northern Kentucky University (NKU) included a philanthropy component and a change analysis component. The Mayerson Foundation supported the philanthropy component with a $4,000 grant. The grant was to provide support for projects by local non-profit organizations. The class of thirty students was divided equally into six groups. Each group identified a community issue that it wanted to address with the grant funding, and completed research to compile a list of local organizations that had a focus on that issue. Each group selected one community organization to partner with based on the fit between the group’s target issue, the mission of the organization, and an initial conversation with the organization. The students visited their community partner organization to learn more about it and to identify a project that might be funded by the grant. They also helped the organization prepare a grant proposal and a presentation to describe the proposal. At the end of the semester, students evaluated the grant proposals and decided as a total class which projects to fund.

In the change analysis component, the student groups made recommendations for change in the organizations they had chosen. This course component was a live case study. Students had to identify specific organizational issues, complete the research necessary to address the organizational issues, evaluate the quality of the data they collected, and then make recommendations about how to address the issues. Students interacted directly with the organizations and made recommendations that had potential for positive impact. Feedback from the students indicated that these live case studies helped them understand the complexity of organizational change. In their reflections on the class, students indicated that the change analysis project was much more difficult than the written case studies they completed in class.
This paper describes the Mayerson Student Philanthropy Project, the implementation of the project within the Change Management course, the change analysis project, the course feedback from the students, and the author's conclusions.

THE MAYERSON STUDENT PHILANTHROPY PROJECT

The Mayerson Student Philanthropy project was created as a partnership between the Manuel D. and Rhoda Mayerson Foundation in Cincinnati, Ohio, and Northern Kentucky University. NKU is located in Highland Heights, Kentucky and is part of the greater Cincinnati, Ohio metropolitan region. NKU is a metropolitan university with approximately 14,000 students. The Mayersons have been very active philanthropists both locally and nationally. The Mayerson Foundation website makes the following statement regarding the organization’s mission:

“The mission of the Manuel D. and Rhoda Mayerson Foundation is to invest, not only its financial resources, but its human resources as well, in efforts that are effective, broad reaching, and that are driven by people with a passion for making a significant difference in the areas of interest to the Trustees. The Trustees seek to play a strategic and catalytic role: a) in the development of new programs, b) in the expansion of existing programs with demonstrated effectiveness, and c) in building the capacity of organizations that implement those programs [Mayerson Foundation website].”

Foundation President Neal Mayerson and NKU President James C. Votruba created an educational experience where NKU students learn about their community and achieve their course learning objectives while acting as philanthropists. The Mayerson Foundation provided financial assistance in the form of $4,000 for each class participating in the student philanthropy project. The partnership between the Mayerson Foundation and NKU is described as follows: “Dr. Mayerson agreed to fund a program integrating philanthropy into the college curriculum with the hope of advancing the development of competent student-citizens who seek to play vital roles in their community and who are committed to the pursuit of the common good [NKU Scripps Howard Center for Civic Engagement website, Mayerson Student Philanthropy Project Overview].” One major premise of the program was that the money would be used twice, once to teach students about the community, its needs, and the course learning objectives and once to help local non-profit organizations meet community needs.

The Mayerson Student Philanthropy Project was initiated in the Fall semester of 2000. The NKU Center for Civic Engagement reported that, as of December 2005, “…$287,428.00 has been invested in 199 projects involving 199 agencies. An estimated 51,670 individuals have been impacted by the Mayerson Student Philanthropy Project [Center for Civic Engagement website, Mayerson Student Philanthropy Project Overview].”

The Mayerson Student Philanthropy Project has been integrated into a variety of classes at NKU. For example, in an Art class, the students had to choose how to allocate funds among local arts-related non-profit organizations. In a course on Influence, students wrote letters to the business community, family, and friends soliciting donations to provide funds for the class to make grants. In a course on Sales Management, students were organized into sales teams responsible for raising additional funds for non-profit organizations. In the Managing Change course, the Mayerson Student Philanthropy Project became a service-learning project.

USING MAYERSON IN A MANAGEMENT COURSE

The Mayerson Student Philanthropy Project was incorporated into a course offered by the NKU management department in the Spring semester of 2003. The course, Managing Change, was required for all management majors and was usually taken by students in their senior year. The class was relatively small (approximately 30 students). Students worked in groups throughout the semester to learn about managing change in organizations and in society. The objectives of the course were to:

- Identify and understand theories of organizational change.
- Analyze the process of organizational change in real organizations.
- Practice critical analysis skills.
- Become more skillful in working in and managing groups.
- Develop written, oral, and interpersonal communication skills.
• Understand how non-profit organizations create social change and assist the organizations in creating social change.

ORGANIZATION OF THE PROJECT

Students were provided with background information on the Mayerson Student Philanthropy project as part of the syllabus. The stated objectives for the Mayerson Project in this course were to: 1) create a positive social change in the greater metropolitan area, 2) explore ways for non-profit organizations to respond to changes in their environments, and 3) apply change concepts learned in the course to create a plan for a local non-profit organization to deal with change. The projects consisted of the following phases:

• Phase One: Students formed groups, known as “community boards” in the Mayerson Project, and identified community needs that they wanted to address. Each group created a specific mission statement that described its goals. Students researched local non-profit organizations that addressed the community need identified in the group’s mission statement. Group members researched at least two organizations and wrote short summaries of their findings for the group to consider.

• Phase Two: Each group chose one or two organizations with which to discuss the project. If an organization’s activities seemed to be a good fit with the group’s mission statement and if the organization was interested in participating, the student group scheduled a visit to learn more about the organization’s activities.

• Phase Three: After the visits, each group chose one organization to “sponsor” and asked that organization to submit a grant proposal. The organizations were asked to provide: 1) a brief description of the organization, 2) a description of the project for which funding was requested, 3) expected outcomes of the project, 4) an itemized budget, 5) an expected timeline for the project, and 6) the overall budget for the current fiscal year. Each student group assisted its non-profit organization with writing the proposal and preparing a presentation describing the proposed project. The six student groups worked with the following local non-profit organizations: Make-A-Wish Foundation®, Cincinnati Zoo & Botanical Garden Cat Ambassador Program, Lydia’s House, The Point, Boys Hope Girls Hope of Greater Cincinnati, Inc., and One Way Farm Children’s Home.

• Phase Four: The students were responsible, as a total class, for deciding which of the six organizations would receive grant funding. The students decided to raise additional funds to be able to support all of the proposals. They raised $1,000. The amount was matched by the Mayerson Foundation, increasing the total award money to $6,000. As a result of the fundraising efforts, each of the six sponsored organizations received a grant award of $1,000. The grant checks were formally presented to the organizations by representatives of the student groups during a University ceremony at the end of the semester.

The change analysis and recommendations that the students prepared for the non-profit organizations represented another important part of the course. After gathering information about an organizational change, the groups used concepts from the class to develop recommendations for the change process. All groups submitted written reports to their non-profit organizations and presented summaries of their work to the class.

CHANGE ANALYSIS PROJECTS

The groups made change recommendations based on the course readings. As an example, one group developed a plan to assist their partner organization with succession planning. The organization operated a school and a group home where it cared for abused, abandoned and neglected children, ages 6 to 21. The founder, the moving force behind the success of the organization, was nearing retirement age. The students utilized Kotter and Cohen’s [2003] “Eight Steps for Successful Large-Scale Change” as the basis for their analysis. Table 1 summarizes the student group’s analysis and recommendations. The Kotter and Cohen [2003] steps appear in the first column, a summary of the analysis appears in italics in the second column, and a summary of the recommendations appears in the final column.
**TABLE 1**
SUMMARY OF THE STUDENT ANALYSIS AND RECOMMENDATIONS FOR CHANGE

<table>
<thead>
<tr>
<th>Step</th>
<th>Summary of Student Analysis</th>
<th>Summary of Student Recommendations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1: Increase Urgency</strong></td>
<td>The members of the organization and the founder were aware of the need to do succession planning because the founder’s health.</td>
<td>Step Completed. No Additional Recommendations.</td>
</tr>
<tr>
<td><strong>Step 2: Build the Guiding Team</strong></td>
<td>The organization’s staff included the office workers, teachers for the on-site school, and the caregivers for the group home.</td>
<td>The guiding team should be composed of the office staff, teachers, caregivers, and the founder.</td>
</tr>
<tr>
<td><strong>Step 3: Get the Vision Right</strong></td>
<td>The organization’s vision was “to help break the cycle of abused and abandoned children and to help each child develop a normal and productive life.”</td>
<td>The founder should work with the staff members to make sure they have a clear understanding of and passion for the vision of the organization.</td>
</tr>
<tr>
<td><strong>Step 4: Communicate for Buy-In</strong></td>
<td>The founder took sole responsibility for achieving the vision, including the solicitation of all donations. However, she believed that staff members were ready to act in ways to support the vision.</td>
<td>The founder should provide weekly updates to the staff members, train them to take over her duties, and help them develop relationships with donors.</td>
</tr>
<tr>
<td><strong>Step 5: Empower Action</strong></td>
<td>The staff members seemed to lack confidence in their ability to manage tasks on their own. This lack of confidence created a barrier to empowerment.</td>
<td>The founder should give the staff members more responsibility until they become confident in their abilities.</td>
</tr>
<tr>
<td><strong>Step 6: Create Short-Term Wins</strong></td>
<td>The staff members had little opportunity to gain experience with the founder’s tasks.</td>
<td>The founder should provide the opportunity for staff members to experience short-term wins by taking several short vacations throughout the course of the year.</td>
</tr>
<tr>
<td><strong>Step 7: Don’t Let Up</strong></td>
<td>The founder will remain in a consulting role as long as she is able. However, if the founder is highly visible, staff members may assume she will continue in her current role.</td>
<td>The founder should continue to delegate her responsibilities to staff members over the next few years. She should only participate in tasks if staff members have a question or problem.</td>
</tr>
<tr>
<td><strong>Step 8: Make Change Stick</strong></td>
<td>The organization should be able to function effectively without the founder if the staff members have been adequately trained in their new roles.</td>
<td>The guiding team should create a new organizational structure that does not include the founder.</td>
</tr>
</tbody>
</table>

During the last week of the semester, the groups made oral presentations describing their change analysis projects to the class. On the last day of class students completed a survey for the Mayerson Student Philanthropy Project. The survey was designed to measure the student outcomes from the philanthropy project. The next section summarizes some of the highlights from the student outcomes survey and student reflection papers.
STUDENT OUTCOMES

The survey questions asked the students to indicate their agreement with a list of statements related to the Mayerson Project. Responses were formatted as a Likert-type scale where 1=strongly disagree and 5=strongly agree. Table 2 summarizes the student responses.

### TABLE 2
SUMMARY OF MANAGEMENT STUDENT OUTCOMES

<table>
<thead>
<tr>
<th></th>
<th>Question</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>I know more about local non-profit organizations as a result of participating in this project.</td>
<td>4.23</td>
</tr>
<tr>
<td>2.</td>
<td>I know more about being a philanthropist as a result of participating in this project.</td>
<td>3.65</td>
</tr>
<tr>
<td>3.</td>
<td>I know more about how funding decisions are made by philanthropists and funding organizations as a result of participating in this project.</td>
<td>3.81</td>
</tr>
<tr>
<td>4.</td>
<td>I have a better understanding of how non-profit organizations create and support social change as a result of participating in this project.</td>
<td>4.15</td>
</tr>
<tr>
<td>5.</td>
<td>I have a better understanding of how philanthropists create and support social change as a result of participating in this project.</td>
<td>3.65</td>
</tr>
<tr>
<td>6.</td>
<td>My experience with this project has made it more likely that I will volunteer my time for a non-profit organization in the future.</td>
<td>3.58</td>
</tr>
<tr>
<td>7.</td>
<td>My experience with this project has made it more likely that I will donate money to social causes in the future.</td>
<td>3.62</td>
</tr>
<tr>
<td>8.</td>
<td>My experience with this project has made it more likely that I will explore career opportunities in philanthropic or non-profit organizations.</td>
<td>2.27</td>
</tr>
</tbody>
</table>

The students most strongly agreed that, as a result of this project, they knew more about local non-profit organizations (mean=4.23) and that they had a better understanding of how non-profit organizations create and support social change (mean=4.15). While the first outcome is more closely related to the overall objectives of the Mayerson project, the second is directly related to the course learning-objective about social change. Students were least likely to agree that the experience made it more likely that they would explore career opportunities in philanthropic or non-profit organizations (mean=2.27). One explanation for this last outcome is that these students were senior management majors in their last semester; many of the students were either already working or had job offers that they had accepted prior to taking this course.

The students wrote final reflection papers that provided information about other outcomes from the project. Below are some excerpts from the papers.¹

“One lesson I learned from the Mayerson project is that you can impact the lives of many people. I realized how good it feels to help people. I thought of how our program would make a difference to the lives of the kids who experienced (the program). This made me realize what we were doing was real, and would help improve the lives of people in our community. Sometimes with school projects you do not put much emphasis on them because you believe they are only practical in academia and have no real life implications. This project gave us real life experiences, which made the learning different from what we would have learned from a book.” N.H.

“Overall, I believe that the philanthropist’s project that our class and several others have done is far more educational than reading a book. It appears to me that you obtain so much more information from hands-on experiences like this one than any textbook can
give. I highly recommend that any student take a class like this one and experience the joy of changing people's lives." M.S.

"...I have learned a great deal about the eight-step process to deal with change. By participating in the Mayerson Project, I got to see an application of this process. Reading a book did a lot for me as far as learning about the process, but applying it to our non-profit organization did much more. The main thing it taught me was that this process can be applied to anything...A second thing I learned through working on the Mayerson Project is that I want to become more involved with non-profit organizations. I had no idea there were so many places that need help..." H.S.

"If given the choice again, I would definitely enroll in a class that did offer a philanthropic component. I enjoyed the class and feel that the knowledge I gained contributes to undertaking future philanthropic acts. Once I graduate from college, I plan to find a non-profit organization in my hometown that I connect with and will support financially. I think one of the neatest things to happen this semester was the ability for the class to come together and collect the funds needed to provide each organization with $1,000. That was an awesome thing for everyone to donate the amount contributing to helping others. Many times it is hard for everyone to see eye to eye, but I was really impressed with the collaboration of the class." C.M.

"This has been a semester I will remember forever. It was so unlike any other class I have taken. Most classes talk about real life applications or let you read cases about other people's real life situations, but never before have I been able to apply class materials to my own real life experience. The Mayerson project allowed me hands-on understanding of the change lessons we were learning in class, as well as, a very meaningful involvement in philanthropy." M.D.

"This was a great project to have done before I graduated. Without it I would have continued to believe that I could not do anything to make a real difference. I feel differently about this now and my wife and I are planning to do more to help. Even though we may not have the money right now, we will still donate our time to help out when we can." J.S.

CONCLUSION

In The Heart of Change [2003], Kotter and Cohen propose that effective change occurs through a process of SeeÆFeelÆChange rather than through a process of AnalysisÆThinkÆChange, the traditional perspective. Through examples from their research they show how this process leads to effective change in organizations. Students in the Managing Change class were able to see the many and varied needs in their community when they started to do the research to find local organizations that focused on their group's mission. Feelings were invoked when they visited the organizations, when they spoke with the organizational representatives, and when they met those served by the organizations. The impact of “seeing and feeling” was powerful. For example, students were willing to use their own funds to make sure that all organizations participating in the class project received funding even though many of them were not regular contributors to the non-profit community. In addition, many students expressed their intentions to volunteer, to donate money, or to work with non-profit organizations in the future.

The overall experience demonstrates that this live case study in service-learning provided students with the opportunity to change through a process of SeeingÆFeelÆChanging. The project provided the students with an appreciation of how ambiguous, complicated, and challenging real organizational change can be.

ENDNOTE

1. The excerpts, drawn directly from the students’ reflection papers, were edited for grammatical structure and clarity.
REFERENCES

