



# Advancement Internship Case Competition

Summer 2021

# The Case for a Case Competition

A case competition is an open-ended problem assigned to small groups that requires data analysis, research, strategy, exploration, and idea generation. While there is no right answer in a case competition, there is a rubric for what each team will be assessed on during their pitch to the judges. For this case competition, teams will have 4 weeks work together to solve the business case and put together a comprehensive plan for implementing that solution. While non-profit work and fundraising varies from for-profit businesses, strategic thinking is arguably more important in the non-profit world, where resources are often limited, and creative thinking raises funds and keeps the organization successful.

No matter where you end up in your career following graduation, you will undoubtedly use the skills learned through the case competition. Below are just a few skills that you will polish by the end of the case competition. Don't forget to add these to your resume!

## Public Speaking

Case competitions provide interns with an excellent opportunity to enhance their public speaking skills and overall communication skills. Presenting to judges can seem very intimidating. However, learning to communicate a solution clearly while maintaining a calm and collected presence is a skill that can be applied to many aspects of life, especially in business.

## Problem – Solving

When receiving a case, interns first identify what the issue/goal may be. The rest of the time is spent finding details and developing an effective strategy to execute their solution. By doing so, interns can practice their skills not only in problem-solving but in situation analysis as well.

## Strategic Thinking

Developing a coherent strategy plays a major role in determining the success of a team's solution. During the process, interns will strengthen their ability to think strategically and analyze the data and information given

## Teamwork

Working as a team is crucial to project success in any area, not just in the world of business. Therefore, learning how to work well with others and conquer challenges together is very beneficial for interns.

## Leadership

Students not only learn the value of teamwork, but they are also provided with the opportunity of learning how to effectively lead their team. As leadership is a popular skill in demand, students can practice their skills by competing in competitions.

## Networking

By participating in case competitions, interns can illustrate what their résumés may state. Interns are demonstrating not only their solution, but also their own abilities and talents to judges. This gives the judges a brief glance to what each student would be like in the workforce. Building connections with the judges and those in the audience lends the opportunity to leave a lasting impression that lands an intern with a full-time career after graduation.



## Solve This:

*How can IU create a culture of commitment between students and the university that results in life-long philanthropic loyalty to IU?*

## Considerations:

- IUF's Long Range Plan Objective 1.4 is: Lead a team composed of "student-facing" partners from across IU to develop and execute a strategy for increasing student lifetime engagement. This means that the IUF believes that development of this are will lead to growth in our donor pipeline. Think big.
- Retention and recruitment of new donors is critical to building the fundraising pipeline
- Your team will need to define what "culture of commitment" and "student lifetime engagement" means and why they are crucial components in the development of student philanthropy.
- Increasing the amount of money that students give while on campus is not the goal. This case question is designed to find ways to create and spark loyalty to the university with a focus on giving back—but, it's a long term strategy.
- It will be important to identify what culture-builders are currently in place on IU's campuses – what makes them successful?
- Participating in a student activity makes a person more likely to donate. IU donors who participated in a student activity are four times more likely to give and have a higher average lifetime giving that is two times greater than that of all alumni.



# About the Strategic Plan at IUF

## Organizational Goal

## Key Strategic Objectives to Support Goal

- Extensive Input**  
*Insights from Donors, BOD, University Partners, Staff*
- External Analysis**  
*General Conditions Affecting Fundraising; Donor Interests and Expectations*
- Internal Analysis**  
*Analyze our Strengths and Ways to Improve*
- Establishment of Goals and Guiding Principles**  
*Principles that Guided Our Process; Broad Quantitative/Qualitative Goals We're Trying to Achieve*

**By 2024, achieve a 'step change' to a level of philanthropic support of \$270–295M per year.**

**Improve donor insight, service and satisfaction**

**Prepare IU fundraising partners for our third century**

**Improve diversity related to staffing and relationship development with diverse donor communities.**

## Initiatives in Phase 1 of the Strategic Plan 9

**Project Team Members and Stakeholders from across IUF and IU  
120+**

\*\*\*Additional resources available in appendix



# About Objective 1.4

## **OBJECTIVE 1: Improving donor insight, service, and satisfaction.**

### **Priorities:**

1. Create a new “capability” within the IU Foundation that focuses exclusively on “advanced” gift impact analysis.
2. Lead a team composed largely of our IU fundraising partners to craft a clear action plan for more coordinated, donor-centric communications.
3. Explore IUF reorganization that creates clear responsibility for donor satisfaction.
4. Lead a team composed of “student-facing” partners from across IU to develop and execute a strategy for increasing student lifetime engagement.
5. Create a cross-functional digital experience team charged with improving and coordinating all aspects of our digital interface with donors.
6. Develop an action plan for investing (funds and talent) in emerging technology related to “donor insight” in partnership with IU’s Luddy School of Informatics, Computing, and Engineering.

## 1.4 Team Members and Roles

<p><b>Team Lead</b> <b>Sarah Beggs</b></p> <p>Chief of Staff &amp; VP, Strategic Initiatives</p>	<p><b>Andrea Alumbaugh</b></p> <p>Senior Writer</p>	<p><b>Andrea Balzano</b></p> <p>Director, IU Student Foundation</p>	<p><b>Anne Wymore</b></p> <p>AVP, Marketing &amp; Annual Giving</p>	<p><b>Jennifer Salamh</b></p> <p>CRM Insights Manager</p>
<p><b>Joanna Landrum</b></p> <p>Marketing Insights Manager</p>	<p><b>John Ginn</b></p> <p>Advancement Project Manager &amp; Systems Analyst</p>	<p><b>Pete Hunter</b></p> <p>Director of Development, IUPUI</p>	<p><b>Susan Hammond</b></p> <p>Director of Enterprise Systems</p>	<p><b>Eryn Wisler</b></p> <p>Senior Associate Director of Student Engagement</p>
<p><b>Leah McRath - Hinton</b></p> <p>Associate Director of Alumni Relations</p>	<p><b>Emily Arth</b></p> <p>Office of Enrollment and Office of Scholarships</p>	<p><b>Staci McFall</b></p> <p>Director of Development, College of Arts &amp; Sciences</p>	<p><b>Hannah Armstrong</b></p> <p>Director of Operations and Strategic Initiatives, Student Affairs</p>	<p><b>Deanna Hardwick</b></p> <p>Director of Development, IU Northwest</p>



# Teams and Resources

## Case Teams and Mentors:

### Team 1:

Patrick McPartlin  
Sweta Murthy  
Molly Grimm  
Daniela Rodriguez



**Betsy Feeny**  
VP of Development,  
Regional Campuses  
efeeny@indiana.edu

### Team 2:

Zoe Berensztein  
Colin Prince  
Mackenzie Kirsh  
Helen Lee



**Paula Jenkins**  
VP of Development,  
Bloomington

### Team 3:

Ariel Oeffinger  
Ruby Flores  
Mary Conrad  
Sarah Jane Bryant



**Dee Metaj**  
VP of Development,  
Indianapolis  
dmetaj@iupui.edu

## Strategic Plan Contact:



**Sarah Beggs**  
Chief of Staff and VP,  
Strategic Initiatives  
sbeggs@iu.edu

Sarah is not only one of the great leaders in the Office of the President at Indiana University Foundation, but she is also serving as the lead for priority 1.4 of the strategic long range plan.

Sarah has a wealth of knowledge and experience when it comes to working with IUSF and other student facing aspects of the Foundation and will be an instrumental resource as you explore the case this year.

Please utilize Sarah and her expertise by asking questions, running ideas or thoughts past her, and as a connector to other key stakeholders that may help you throughout your case.



# Approach and Expectations:

## Presentation Format:

**Delivery Method:** You will be presenting your presentation via Zoom. The presentation will also be recorded to allow you to have as a piece in your personal work portfolio.

**Delivery Format:** Your presentation allotment will be 45 minutes total. Your team should spend about 5 minutes introducing each team member. The total presentation time will be 30 minutes, with the last 15 minutes reserved for Q & A.

**Expectations:** You should have visuals. PowerPoint or a similar tool is recommended for Zoom. Each individual on the team should engage in a speaking aspect of the presentation, though playing on each teammates strengths is allowed, so speaking times do not have to be equal.

## Preparation:

**Time Commitment:** Your team will be expected to schedule your own group work time within your work week. You will also be expected to work on components of the project individually, and with your VP mentor. Plan to schedule 4 hours per week to work on this project and be sure to keep your manager aware of your working time! Your manager may also have valuable ideas to contribute, so keep them in the loop!

**Practice:** Be sure to set aside time to rehearse and practice as a team and with your VP mentor. The beauty of Zoom is that you are able to record your presentation, and then play it back to see where you can improve. Be sure to practice individually, but also be sure to practice as a full group so that you can test your timing and transitions. Shannen is also available to schedule practice sessions with at any time.



# Evaluation Criteria

## Suggestions for Getting Started:

Think about the key partners throughout IU, the IU Foundation, and other higher education institutions who have successful, similar goals and programs. Use the background information provided by Sarah. You should also use the internet or other sources to research data, best practices, information and solutions.

Keep in mind that this is a great opportunity to network. As you are researching, reach out to industry professionals whom you think may be able to help. If you are hesitant to reach out or would like a connector, reach out to your VP sponsor, Sarah Beggs, or contact Shannen Wisniewski – we are happy to help you connect, and are also happy to provide ideas as to who it may be helpful to connect to

## What we'll be looking for:

**Creativity and Sustainability :** Your proposal should be creative. The goal is to think outside the box, and beyond what has been done at IU/in higher education before. In addition to being creative, your solution should be sustainable, meaning you have thought through how your proposal will hold up over time.

**Audience Segmentation:** As part of your proposal, you should be sure to specifically outline how your proposal will touch a variety of audiences. You should define audiences as you see fit, however please be sure to include how and why you segmented your audience as you did, and how you will engage each group.

**Demonstration of Impact:** Your proposal needs to include how you will demonstrate to students and alumni the impact that their lifelong engagement has with the university. Be creative, here.

**Diversity & Inclusion:** Your proposal should be built out with diversity and inclusion at the forefront. How will you specifically attract , retain, and engage diverse student and alumni populations? How will you make sure that all groups of people are included? How will DEI play into your marketing?

**Marketing and Solicitation:** Your solution should include how you plan to “sell” this concept of lifelong engagement. This should be a multi- channel marketing strategy. A great approach will break down your marketing strategy audience type as well as over time.

**Question and Answer:** Your team should be prepared for what types of questions you may get in the Q & A portion of your presentation. It is helpful to prepare an appendix at the end of your presentation that contains additional data, research, and graphics to back up your findings and strategy.

**Be sure that you have accounted for each and every criteria. The judging committee will have this rubric in front of them and will grade on a scale of “poor”, “average”, good” “great” for each criteria.**





# Competition Judges:

**Team Lead**  
**Sarah Beggs**



Chief of Staff  
& VP, Strategic  
Initiatives

**Andrea**  
**Alumbaugh**



Senior Writer

**Andrea**  
**Balzano**



Director, IU  
Student  
Foundation

**Anne Wymore**



AVP, Marketing  
& Annual  
Giving

**Jennifer**  
**Salamh**



CRM Insights  
Manager

**Joanna**  
**Landrum**



Marketing  
Insights  
Manager

**John Ginn**



Advancement  
Project  
Manager &  
Systems  
Analyst

**Pete Hunter**



Director of  
Development,  
IUPUI

**Susan**  
**Hammond**



Director of  
Enterprise  
Systems

**Beth Miller**



Assistant  
Director, IUSF  
Operations



## Next Steps:

- Set up a time as a team ASAP to meet and put together a plan to tackle the case
- Set up a time to meet with your VP mentor to introduce yourselves and start talking strategy (ASAP)
- Assign roles and responsibilities and create a project plan as a team
- Set recurring meetings for your team to touch base on project status
- Keep your manager informed on the progress and status of the case competition- use them as a resources as well!

**ASK QUESTIONS, HAVE FUN, AND  
MAKE CONNECTIONS!**