WHO IS ACCOUNTABLE FOR WHAT IN THE UCLA SOCIAL ENTERPRISE ACADEMY?

[Many thanks to Marnie Bodek, former UCLA staffer and Academy mentor, for this document!]

A. **Students:** Each team will have 4-5 students from the College of Letters & Science.

**Roles and Responsibilities:**
1. Learn about the non-profit through site visits, readings and discussion with non-profit staff.
2. Draft SWOT analysis
3. Serve as primary resource for all data driven decisions (i.e. develop, test and validate hypotheses)
4. Recommend at least 3 business venture ideas to the non-profit
5. Prepare market analysis for proposed business venture and a substantial write-up of that analysis
6. Prepare business model for proposed business venture and a written business plan for the venture in coordination with not-for-profit team members
7. Prepare a set of pro-forma financial statements for proposed business venture.
8. Work with non-profit staff and coach to prepare Final Presentation for Showcase.

**Expectations:**
1. Identify a group leader and determine appropriate areas of responsibility for individual student members.
2. Commit at least 240 hours per student in and out of the class over two quarters (12 hours/week including class)\(^1\)
3. Remember that their role is to serve the non-profit.
4. Develop recommendations for each major component of the process.
5. Utilize their team coach as an advisor/resource for data-driven elements of the planning process, especially the marketing research and financial modeling.
6. Communicate with SEA Leadership Team when/if team issues develop.

B. **Non-profit Organization:** An organization or venture that advances a social mission and wants to develop an earned income strategy to forward that mission.

**Roles and Responsibilities**
1. Provide financial & program information on the non-profit’s mission, purpose, values and goals.
2. Explain financial needs and expectations in context of venture development process.
3. Host site visit.
4. Undertake SWOT analysis to generate a multitude of possible venture ideas.

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\(^1\) This is official UCLA workload policy as stated on page 25 of this document
http://www.registrar.ucla.edu/facultystaff/ugcrsprgaprvgd.pdf
5. Work with students to develop hypotheses for venture ideas, market research, marketing plan and business plan.

6. In collaboration with the full team, develop and present the final presentation

**Expectations**
1. Provide 3-5 representatives from the organization (staff and/or volunteers such as board members) to attend class workshops, site visit(s), and participate in all collaborative meetings – these individuals will invest @50-60 hours each between January and June.
2. Refrain from limiting the team process to any pre-conceived business ideas.
3. Listen to all student recommendations with an “open mind” and provide respectful feedback.
4. Make initial contact with their mentor and together determine the appropriate frequency of communication.
5. Be transparent with all meetings and invite all parties to attend.
6. Share data on relevant program and financial progress upon request for at least 18 months following the completion of the program.

C. **Mentor:** An experienced professional who will guide the nonprofit team in crafting a social enterprise that is sustainable and will expand the non-profit’s impact.

**Roles and Responsibilities:**
1. Advise the non-profit team by asking questions, providing an outside perspective, challenging assumptions, providing guidance and suggesting resources.
2. Serve as an experienced “ear” to the non-profit team leader.
3. Ensure that the business planning process is on track.
4. Help the team refine their model and prepare the final presentation.

**Expectations**
1. Provide honest feedback to the non-profit about student recommendations and suggest, “course corrections” as needed.
2. Serve as an advisor to and advocate for the non-profit and provide referrals for them as needed.
3. Commit a minimum of 6-12 hours to the non-profit and will attend their final presentation.

D. **Coach**

**Description:** A young professional who will provide the students with assistance and guidance in developing the various components of the business plan.

**Roles and Responsibilities:**
1. Serve as a resource for students by assisting them with their market research and plan, business model and financial projections.
2. Ensure that the students understand the business model components and use appropriate assumptions. Provide feedback as needed on all components.
3. Conduct dress rehearsals and advise on slide presentation, public speaking and appropriate dress for the student practice pitch.

**Expectations:**
1. Serve as an advisor to the students as they develop data-driven components of the business plan.
2. Provide general advice to students on how to deal with conflict on their team.
3. Commit a minimum of 8 hours to the students--coaching them via Skype, phone or in person at a minimum once every 10 days.
4. Attend at least one all-team meeting and is welcome at all class sessions and the Showcase.

F. **SEA Leadership Team: Andy, Betsy, Archie and Annalisa**

**Roles and Responsibilities**
1. Screen and select students and non-profit organizations that apply to participate in the Academy.
2. Develop, lead and/or oversee all classroom lectures and discussion
3. Review and comment on business venture ideas, marketing plan, business plan and final presentation
4. Provide timely feedback and serve as a resource for all team members if and/or when the process challenges teams

**Expectations**
1. Provide honest and timely feedback to each team
2. Respect all team members and their final decisions
3. Do whatever it takes to fulfill the promises of the program.

**Expectations For All Team Members:**
1. Work collaboratively on development of business venture and final presentation with all team members.
2. Utilize guest resources & SEA Leadership Team for feedback on the SWOT Analysis, selection of the business venture, review of the marketing plan, business plan and final presentation.
3. Consult with the SEA Leadership Team, when process questions arise or team problems surface.
4. Respect all team members.
5. Attend appropriate scheduled classroom workshops, team meetings and site visits.
6. Refrain from “limiting” the team process in any way.
7. Remain committed to the project until its completion.