

Institutional Marketing Plan

2015–2018

STRATEGIC GOAL To become the Northwest’s leading institution for rigorous, personalized liberal arts and graduate professional education, attractive to students and faculty from across the nation and around the world.

(from the Willamette University Strategic Plan, February 2013)

THE INSTITUTIONAL MARKETING PLAN (IMP) is designed to increase Willamette University’s visibility, strengthen the institution’s reputation and align its communications efforts across campus. Success in these efforts will build enthusiasm and morale within the university community and ensure that it achieves its fundraising and student recruitment objectives. The plan outlines a series of strategies and tactics to create a unified brand, centered on the overarching Willamette brand (the “Big W”), while supporting each school and program.

As outlined in Willamette’s 2013 Strategic Plan, “each school strengthens and is also strengthened by its affiliation with ‘the Big W’: that the curricula and student experiences, faculty scholarship, and external visibility of each part of the university benefit from the low barriers between the units and the strong coherence of our strategic planning.”

To accomplish this bold goal, the IMP details objectives, strategies and tactics for Willamette’s multiple audiences:

- Alumni (recent and experienced)
- Current Parents
- Current Students
- Donors
- Employers
- Faculty and Staff
- Media and Influencers
- Prospective Parents
- Prospective Students

SITUATION ANALYSIS

Willamette University is strengthened by its status as the first university in the West and a smaller, more intimate campus that fosters personalized education and robust community. An unusually strong and broad-based awareness of and connection to the university's motto unites alumni and community members across generations and programs. Students benefit from access to outstanding faculty members who are recognized nationally by Carnegie and others for teaching and academic contributions. Faculty often engage in place-based learning opportunities (including Zena Forest, the legislative and executive branch agencies in and around the Oregon State Capitol, regional non-profit organizations and corporations) to transform knowledge into action. In the past few years, Willamette has also benefitted from recognition by third-party endorsers, including the popular guidebook Colleges That Change Lives, Bloomberg Businessweek (MBA programs list), Forbes magazine (ROI and value) and Payscale.com.

Lack of consensus around the articulation of institutional identity and the value of institutional marketing, and limited resources for marketing expenditures at the "Big W" level over a significant period of years contributed to a decentralized approach to communications and marketing that, while important for the viability of individual programs, weakened the overall Willamette brand. Willamette also faces challenges from perceptions of its location in Salem (as compared to Portland or other locales), as mentioned in feedback gleaned from the Admitted Student Questionnaire (ASQ). As questions about the cost of higher education shape much of the relevant public dialog, Willamette also must address questions about price and value.

A number of opportunities help position Willamette to overcome these weaknesses. Its Northwest location is seen increasingly as attractive to prospective students and faculty members. The university is building relationships among organizations, employers and other partners to help students connect with graduate programs, service projects, internships and career opportunities. Growing numbers of first generation students, students who are financially needy and/or are from historically underrepresented communities in the U.S. and expanding international markets continue to diversify and expand applicant pools for all programs. Willamette's dual degree programs, the BA/MBA, BA/JD and JD/MBA, offer opportunities for cross promotion.

The university also faces threats from increased competition, particularly from a recovering public higher education sector and among graduate programs in the local and regional market. Competition for talented and diverse faculty members also affects Willamette's standing as a top tier institution, and it is especially important to attract and retain new faculty and staff from historically underrepresented communities. As colleges faces questions about the value of a liberal arts education, the pool of U.S. high school students continues to shrink. The Chronicle of Higher Education reports that the U.S. population age 18 and under will shrink from 34% today to only 21% by 2050.

COMPETITIVE LANDSCAPE

Willamette faces competition from private and public colleges in the region and around the country. One way to define Willamette's competitive set is through analysis of students admitted to Willamette and other institutions.

UNDERGRADUATE ADMISSIONS

Cross Applicants

- Lewis & Clark College
- University of Puget Sound
- University of Portland
- UC Davis
- University of Oregon

Cross Admitted

- Lewis & Clark College
- University of Puget Sound
- University of Portland
- University of Oregon
- University of Washington

GRADUATE ADMISSIONS

Cross Admitted — Atkinson Graduate School of Management

- Portland State University
- University of Oregon
- Oregon State University
- University of Portland
- University of Washington

Cross Admitted — Willamette University College of Law

- Lewis & Clark College
- University of Oregon
- Gonzaga University
- Seattle University
- University of Washington

From these lists of cross admitted students, several key competitors emerge:

- University of Oregon (undergraduate, AGSM, Law)
- University of Washington (undergraduate, AGSM, Law)
- Lewis & Clark College (undergraduate, Law)
- University of Portland (undergraduate, AGSM)

Observing benchmark institutions — of similar size and scope to Willamette in other parts of the country — can also inform marketing strategies. These benchmark institutions include schools like the University of Richmond and Rollins College — liberal arts colleges with distinctive graduate programs.

Willamette also competes nationally for faculty talent — especially with larger, research-driven institutions. Positioning Willamette as a leading institution for the liberal arts, graduate management and legal education has the added benefit of attracting and retaining talented new faculty members.

POSITION STATEMENT

Willamette University's talented faculty inspires students to examine issues critically, think creatively and act effectively. By leveraging our place and engaging the resources within our collaborative community, Willamette prepares students to transform knowledge into action - the foundation of a successful career and a meaningful life.

This position statement is strengthened by key distinctions that unite our campus, reinforce our messaging strategy and reflect the elements that exist “Only at Willamette.”

Key Distinctions

1. **The first university in the West, Willamette is adjacent to Oregon's State Capitol and governing offices** — in effect an extra set of Willamette classrooms that provide innumerable opportunities for civic engagement and enriched student learning. This intimate connection between university and state is found nowhere else in the U.S. — and all programs, graduate and undergraduate, benefit from this collaboration.
2. **An unusually distinguished faculty** — even by liberal arts college standards, with more Carnegie/CASE Professors of the Year (11 of the previous 24 years) than any other college in the West. A student is more likely to be taught by a Carnegie Professor of the year at Willamette than any other institution of higher education in the nation. Faculty from the Atkinson Graduate School of Management, whose achievements have been recognized by the Aspen Institute, and talented legal educators at the College of Law further differentiate Willamette from competitor institutions.
3. **A connection to sustainability and the immediate natural environment of the Northwest and the Willamette Valley** — one of the most fecund places on the planet, enriched by our nearby 305-acre Zena Forest. Specialized programs at the undergraduate and graduate levels connect students to opportunities where, in addition to other place-based research and activity, they can critically examine and apply knowledge of sustainability to various disciplines and career pursuits (examples: sustainability management area of interest at AGSM, sustainable law certificate at the College of Law).
4. **A global orientation made concrete and emphatic by an extraordinary number of faculty with international experiences, a host of academic programs with an international focus and a 50-year partnership with Tokyo International University**, which, in addition to the already present myriad of study abroad, curricular and exchange programs, brings over 100 students a year to Willamette's American Studies Program to enhance the Willamette community. Similar global opportunities exist at AGSM (international student population, study abroad options) and the College of Law (China program, degree opportunities for international students).
5. **Dual degree programs with Willamette's Atkinson Graduate School of Management (3/2) and College of Law (3/3)** allow students to seamlessly combine the best of a liberal arts education with high-quality professional preparation on one campus. Students can earn two degrees in less time, with potentially less expense, than it would take to complete them separately.

MARKETING OBJECTIVES

1. Develop effective internal communications to help our campus community understand and share the Willamette story consistently.
2. Tell the Willamette story clearly across media platforms to external audiences.
3. Raise positive awareness for Willamette in the Northwest region, the West Coast and around the country.
4. Increase the number of quality applicants to all Willamette degree programs.
5. Build affinity for Willamette, particularly among alumni, and increase participation in the form of giving, volunteering, event attendance and engagement.
6. Support strategic, data-driven marketing communication and outreach activities across campus.

STRATEGIES

1. Develop an Institutional Marketing Plan that outlines key brand distinctions that can be applied across campus and exist “Only at Willamette.”

Tactics

- a. Continue the work of the Institutional Marketing Committee to review, revise and adopt the Institutional Marketing Plan and make strategic decisions about marketing communication efforts for the university. (fall 2014–summer 2018)
- b. Convene a regular group of campus communicators for updates on current marketing communication efforts, discuss emerging trends and learn about how new ideas may be applied and shared. (ongoing)
- c. Enhance the Office of University Communications through two additional staff members — an editorial director (hired) and director of interactive media and web communications. (summer and fall 2015)
- d. Create a robust editorial calendar for the Willamette website and key publications — including Willamette magazine, the President’s Annual Report, AGSM’s Directions and the Willamette Lawyer. (summer 2015–spring 2016)
- e. Conduct an audit of Willamette’s current social media channels and develop a digital media strategy for these channels, led by the director of interactive media. (fall 2015–spring 2016)
- f. Continue to develop the Office of University Communications’ video production capabilities and produce regular videos to supplement profiles and illustrate key distinctions. (ongoing)
 - i. Establish a designated YouTube channel for Willamette with copies of distinction videos for easy sharing among third party sites (i.e. Princeton Review, U.S. News and World Report, Hobsons, etc.).
- g. Continually leverage the President as the university’s leader and the public ‘face’ of the institution. Work with the Office of the President to identify opportunities for community visibility, presidential outreach and speaking opportunities. (ongoing)
 - i. Update the institutional list of sponsorships, including all program-specific sponsorships, purpose, cost and timing. (spring 2015)
 - ii. Update the “Salem is Home” brochure to include infographics and statistics on Willamette’s impact on the Salem community — expand to include Oregon and the Northwest. (summer 2015)
 - iii. Create an institutional overview presentation and slide deck for use at sponsored events. (summer - fall 2015)
 - iv. Create institutional banners, tents and other “brand-building” items that can be shared and used at sponsored events and activities. (summer 2015)

2. Align the university under a renewed website and email distribution system that better tells the Willamette story.

Tactics

- a. Develop a content outline that integrates the functional needs of the website with opportunities to tell stories and share information about Willamette's people, programs, place and purpose. (spring and summer 2015)
- b. Utilize a dynamic homepage that focuses on storytelling and image-rich content to introduce Willamette to prospective students, prospective parents and visitors. (spring and summer 2015)
- c. Develop a bank of stories under the "I am Willamette" theme to populate the hero story in new website structure. Stories must represent a mix of students, alumni, faculty and programs. (spring and summer 2015)
- d. Create an interactive newsroom that includes current news stories, events, media fact sheets and an online faculty expert list. (summer 2015)
- e. Utilize "tagging" capabilities on web-based content to share information and stories between website sections, departments and schools. (spring and summer 2015)
 - i. Add more student voices to the website through blogs, Instagram feeds, Twitter feeds and other interactive tools. (summer and fall 2015)
- f. Create content, URLs, keywords and page titles with search engine optimization in mind. Develop landing pages for possible future search engine marketing (SEM) campaigns around key enrollment cycles. (spring 2015)
- g. Select and implement an e-mail marketing system to track contacts, opt in/out of e-newsletters and segment audiences for various constituencies across campus. (fall 2015–spring 2016)

3. Create cohesive campus-wide communications, leveraging current resources and collective communications efforts to achieve marketing, admission and fundraising goals.

Tactics

- a. Update the University Communications website to include more content available for campus communicators, including logos, photographs, social media icons, templates and revised style guides. (fall 2015)
- b. Create a set of Willamette "talking points" and standard institutional description copy for press releases, job postings, third-party websites and other external uses. (summer 2015)
- c. Evolve the Bearcat Bulletin as an internal communication tool to share stories of interest to the campus community, contributions and messages authored by deans and vice presidents and other key announcements and events. Evaluate open rates and click-through numbers regularly to make adjustments. (summer and fall 2015)
- d. Schedule regular marketing "skill-building" workshops led by University Communications and Web Development to share best practices with communicators across campus. (fall 2015 and spring 2016)
 - i. Training topics and strategies to include an understanding of digital technologies, including active users of the content management system and e-mail distribution systems, to develop content with SEO optimization and best practices in mind.
- e. Work with WITS and building administrators to develop a plan for display monitors across campus to broadcast important announcements, events and promotions. Create identity standards for visual signage. (summer and fall 2015)
- f. Work with the Willamette Store staff and buyers to identify opportunities to enhance current offerings and look for opportunities to distribute institutionally branded merchandise in the store, online and, as appropriate, through other outlets. (fall 2015)

- g. Conduct an audit of current campus signage through collaboration between University Communications and University Services. Revise standards for internal and external building and way-finding signage across campus and update maps and collateral pieces as needed. (spring and summer 2015)
- h. Refine institutional messaging and collateral pieces for the new Visit Center and work with designers and contractors to ensure the new facility reflects the Willamette experience and tells the institution's story. (summer and fall 2015)
- i. Conduct an audit of current media buying by various campus communicators and identify opportunities for collaboration and new channels to tell Willamette's story through strategic media placement. Seek efficiencies while supporting and achieving institutional and programmatic marketing goals. (summer and fall 2015)
 - i. Create an institution-wide advertising calendar to improve efficiencies.
 - ii. Develop advertising templates for institutional and program-specific communications.

4. Create the next generation of undergraduate student recruitment, admission and enrollment communications tools.

Tactics

- a. Identify and collaborate with an outside vendor (North Charles Street Design Organization — NCSDo) to shape the strategy for undergraduate enrollment materials. (spring and summer 2015)
 - i. Develop updated print and online materials for undergraduate admissions.
- b. Refine email marketing processes for undergraduate students. (summer 2015)
- c. Expand current senior search campaigns to include high school juniors and seniors (fall 2014 and spring 2015).
- d. Update the role of admission tour guides by renaming them and selecting appropriate professional clothing for guides that reflects Willamette's northwest location. (spring and summer 2015)
- e. Develop a request for proposals to identify an appropriate customer relationship management (CRM) system that can be utilized for enrollment activities campus-wide. (fall 2015–spring 2016)

5. Develop communication strategies and plans for the graduate programs to create cohesive, integrated and unique experiences for prospective graduate students.

Tactics

- a. Refresh content for AGSM's direct marketing campaigns to full-time MBA prospects and explore expansion to the MBA for Professionals program. (summer and fall 2015)
 - i. Develop direct marketing strategies for the College of Law.
- b. Collaborate with the College of Law and AGSM to refine messaging and produce updated materials for enrollment marketing.
 - i. Develop new view books and admit packets for the College of Law and AGSM. (summer and fall 2015)

6. Position Willamette as a leading institution through an effective media relations strategy.

Tactics

- a. Collect and update media lists and develop a media relations plan that includes proactively pitching to media outlets locally, regionally and nationally.
 - i. Develop a faculty experts list and distribute it to targeted media outlets. (spring and summer 2015)
 - ii. Design an editorial calendar for possible media placements and potential opportunities for op-eds from faculty and university administrators. (ongoing)

- iii. Develop and schedule annual media training sessions for faculty and University administrators. (ongoing)

7. Strengthen affinity among supporters of Willamette University, most notably the alumni community.

Tactics

- a. Redesign The Scene as Willamette magazine to better align with Willamette’s identity and share stories of students, faculty and alumni with the Willamette community and beyond. (fall 2014)
 - i. Distribute Willamette to the on-campus community through strategically placed display racks. (fall 2014)
 - ii. Refine and update the online presence of Willamette magazine to include “online only” content and expanded class notes and obituaries. (fall 2015)
- b. Create an editorial calendar for electronic communications and newsletters — including the Willamette University Alumni Association Update, Event Connection and Willamette University News — through the joint efforts of University Communications and Alumni and Parent Relations. (spring 2015)
 - i. Update and refine ATKINSONNews as the monthly electronic newsletter for AGSM. (summer 2015)
 - ii. Establish a template for a monthly electronic edition of the Willamette Lawyer.
- c. Collaborate with Alumni and Parent Relations on creating an updated brand identity and drafting a communications strategy for the Willamette University Alumni Association (WUAA) that leverages current assets (including in-person events and networking, social media, Switchboard, etc.). (ongoing)
- d. Work with annual giving on year-long communication strategies to create consistency and integration across all appeals. (spring and summer 2015)
 - i. Develop branding and consistent messaging around calendar year-end giving and fiscal year-end giving.
 - ii. Develop a brand and image around the Day of Giving (“24 Hours of Giving”) challenge and establish it as an annual event to support Willamette’s fundraising goals. (spring 2015)
- e. Utilize the university’s connection with the Institute for Continued Learning to strengthen ties with the Salem community. (spring 2016)

8. Use the upcoming comprehensive fundraising campaign and 175th anniversary (2017) to reposition the university under the “Big W” brand.

Tactics

- a. Develop a communications plan for the silent and public phases of the campaign in line with the university’s identity and marketing messages. (fall 2014–summer 2015)
 - i. Develop cases for support that outline fundraising priorities and position Willamette as a sound investment for philanthropic support.
- b. Raise awareness about Willamette’s distinctions through stories and examples that illustrate the “Only at Willamette” messaging. (fall 2015–spring 2016)
 - i. Integrate fundraising messages into other institutional communications as appropriate. (fall 2015)
- c. Prepare for Willamette’s upcoming 175th anniversary (2017) and tie into the messaging of the campaign. (summer 2015–spring 2017)

9. Develop and execute an institutional visibility and awareness campaign.

Tactics

- a. Create institutionally specific radio, print, digital and outdoor/display advertising vehicles and place them in key (Portland, Seattle, San Francisco) institutional markets. (summer 2015)
- b. Evaluate the effectiveness of institutional visibility initiatives and make adjustments as needed. (ongoing)

10. Develop a campus Welcome Center that serves as a location where all campus visitors, prospective students, alumni and community members are greeted, oriented to campus, introduced to the university's rich history and are able to access the Willamette story.

Tactics

- a. Work with appropriate vendors and internal resources to create a Willamette history exhibit that chronicles the institutions history in a compelling and relevant manner. (summer and fall 2015)
- b. Ensure that campus way-finding and signage is in alignment with Welcome Center objectives. (summer and fall 2015)
- c. Collaborate with state capitol staff in developing coordinated visit opportunities. (ongoing)

BUDGET

Achieving the strategies and tactics outlined in this plan requires the allocation of resources — in the form of human and financial capital — to marketing efforts. A few expenditures have already been made:

Redesign of Willamette magazine (summer/fall 2014) — \$65,000 in research, outside consulting work, graphic design time and strategic planning to shape the inaugural issue of the magazine and set a visual and editorial direction.

Website transition project (spring 2014–summer 2015) — \$200,000 to conduct research, shape a content strategy, design a new homepage that better tells the Willamette story, create wireframes and templates for departmental and individual pages and begin the integration of content into the refreshed web presence. A significant amount of human capital by Willamette staff in Web Development and University Communications is required to fully transition to the new web presence.

Undergraduate student recruitment marketing campaign (fall 2015–fall 2018) — \$175,000 to conduct research, shape a strategy, design concepts and produce new materials for undergraduate student recruitment and admissions. Deliverables include print and digital collateral.

Institutional visibility and awareness campaign (fall 2015–spring 2018) — \$300,000 to develop messaging and collateral pieces and implement a media schedule for advertising in key recruitment markets — most notably Portland, Seattle and San Francisco.

MEASUREMENT AND ONGOING RESEARCH

Engagement with Media:

- Conduct monthly audits of social media channels to benchmark the number of followers/likes and engagement with content
- Assess number of positive media stories and placements, including national publications

Messaging Evaluation and Audit:

- Establish strategies for ongoing research, including student and alumni focus groups, benchmarking studies of employers and partners
- Develop a strategy to evaluate institutional advertising, such as custom URLs, website analytics and the use of hashtags to encourage engagement

Sample Media Schedule*

Media	Type	Market	Proposed Run Dates	Cost
OPB News	Radio	Portland-metro, Willamette Valley	3x per week in Feb, Apr, Sept, Nov	\$25,000/year
Portland Airport Advertising	Display, WiFi Sponsorship	Portland-metro	Two 5x5 displays and digital signage	\$28,000/year (1/3 cost, shared with graduate programs)
Portland Monthly	Print with Digital Bonus	Portland-metro	Full page ad in Feb, Apr, Sept, Nov	\$13,000/year (\$3250 per insertion)
KUOW	Radio	Seattle	2x per week in Feb, Apr, Sept, Nov	\$20,000/year
Seattle Metropolitan	Print with Digital Bonus	Seattle	Full page ad in Feb, Apr, Sept, Nov	\$14,000/year (\$3500 per insertion)

**For illustrative purposes only, budget numbers estimated.*

Achieving Institutional Benchmarks:

- Enrollment numbers for all schools, including class sizes, diversity (ethnic and geographic), achievement and discount rates
- Annual giving totals and participation among schools and classes
- Major gifts and other forms of philanthropic support
- Participation among alumni at events and other activities initiated by the Office of Alumni and Parent Relations and the Willamette University Alumni Association
- Quality of new faculty hires and regular updates on the profile of faculty members (research, awards, productivity) and other metrics established in collaboration with the Office for Faculty Research and Resources