



THE UNIVERSITY OF THE WEST INDIES
OPEN CAMPUS

Integrated Marketing and Communications Plan 2012-2014

Open Campus Marketing and
Communications Department

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The University of the West Indies

The Vision and Mission of The UWI

UWI Vision

By 2017, the University will be globally recognised as a regionally integrated, innovative, internationally competitive university, deeply rooted in all aspects of Caribbean development and committed to serving the diverse people of the region and beyond.

UWI Mission

To advance education and create knowledge through excellence in teaching, research, innovation, public service, intellectual leadership and outreach in order to support the inclusive (social, economic, political, cultural, environmental) development of the Caribbean region and beyond.

Core Values

Integrity, Intellectual Freedom, Excellence, Civic Responsibility, Accessibility, Diversity and Equity.

The UWI Open Campus Guiding Principles, Values & Strategic Options

Guiding Principles

The Open Campus of the University of the West Indies is based on the idea that the high-quality university education, research and services available at our institution should be open and available to all people who wish to reach their full potential inside and outside of the Caribbean region.

The Open Campus will adopt quality teaching and learning experiences, innovative pedagogic design, relevant research and community partnerships to deliver face-to-face, blended and online learning.

Core Values

Student-Centred

Agile

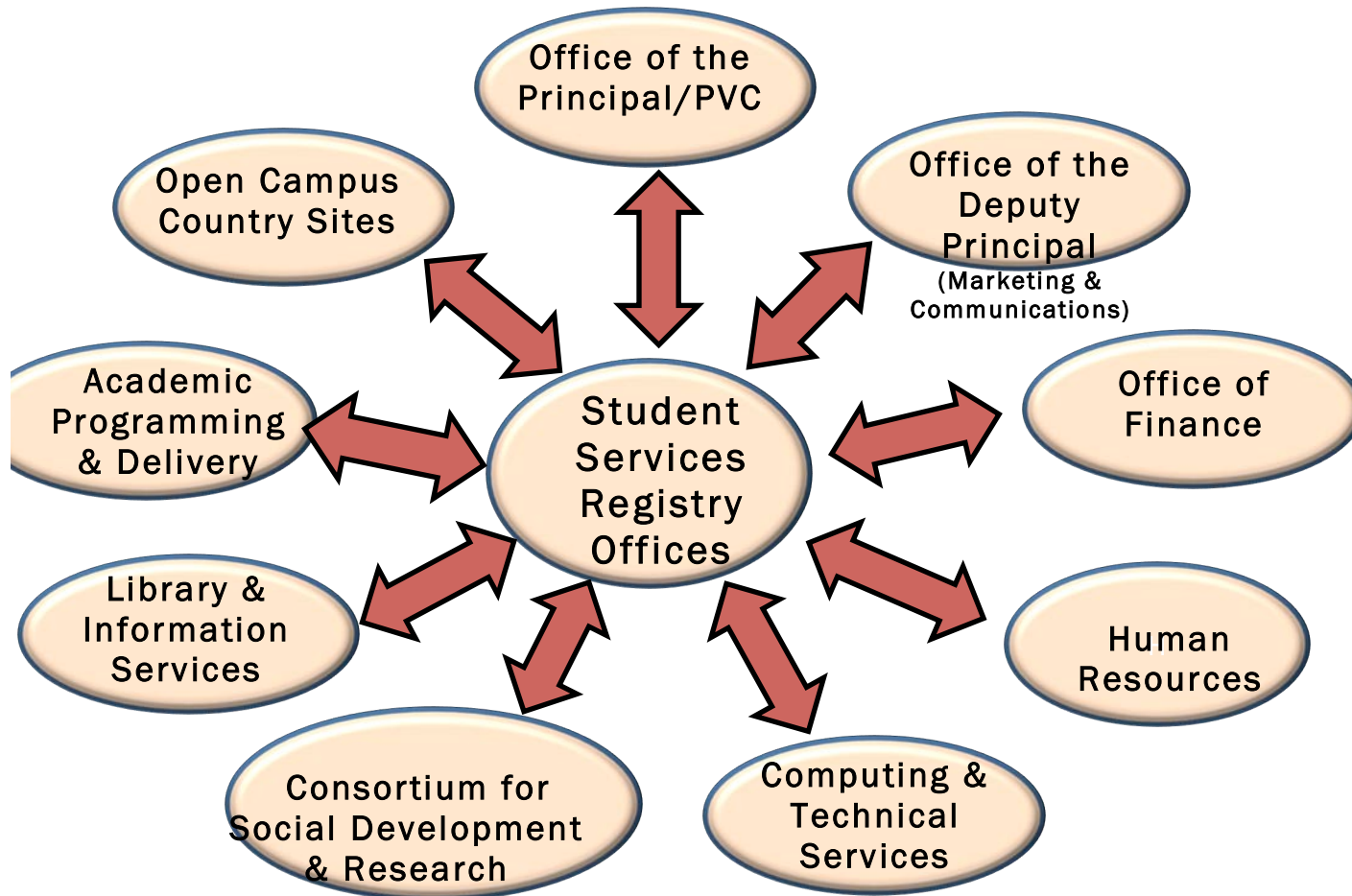
Accessible

Enabling

Strategic Options

1. Develop a consistent and effective approach to product management and rationalisation.
2. Expand the UWI Open Campus footprint.
3. Promote and undertake research as a vehicle for Caribbean development especially within the UWI-12.
4. Build strategic networks regionally and globally to support the university's mission and vision and core values.
5. Continue to create inter-departmental alignment and system integration to support the core business of the Campus.

Integrated Marketing for the UWI Open Campus



Marketing provides information that helps programme planners at educational institutions make sure that they are meeting the needs of a changing society and to make the institution the best it can be doing what it does. The only threat of marketing is that it may show some institutions that they are not as good as they think they are, and that is why marketers may have to choose different strategies, e.g. employing consistent and steady tactics instead of overtly aggressive tactics, depending on the readiness of a particular institution to enter

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certain markets. By clarifying its competitive advantage (convenience, cost-effective, accessible), an institution has the opportunity to become one of the best of comparable institutions.

What is Marketing?

It is a process by which individuals and groups obtain what they need and want through creating and exchanging products and value with others (Kotler & Armstrong, 10th ed.)

Definition of Marketing (*The American Marketing Association Board of Directors*)

Marketing:

Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large. (Approved October 2007)

Marketing Research:

Marketing research is the function that links the consumer, customer, and public to the marketer through information-- information used to identify and define marketing opportunities and problems; generate, refine, and evaluate marketing actions; monitor marketing performance; and improve understanding of marketing as a process. Marketing research specifies the information required to address these issues, designs the method for collecting information, manages and implements the data collection process, analyzes the results, and communicates the findings and their implications. (Approved October 2004)

Marketing is reality therapy. It makes you find out what you do well and stop kidding yourself about what you don't do well. It shows you how to manage yourself to a new and credible level of distinction. Marketing is absolutely compatible with intellectual thinking as it bases its recommendation on research and analysis of trends and reports, and it insists on applying reason to the strategies and tactics it recommends.

Integrated marketing is collegial in that it sets up processes that involve all segments of the organisation, faculty, staff, and students. Everyone with talent is able to use it, and everyone with ideas gets heard. Since the process is ongoing, someone can still input even after a strategy is in implementation mode. The only critical demand from marketing is that a service or product *promised* becomes a service or product *delivered*, and that professional and support staff *in every corner of the Campus* takes pride in the quality of what they do.

A marketing way of thinking – especially as we manage change in the academy – is therefore essential to everything we do especially with new

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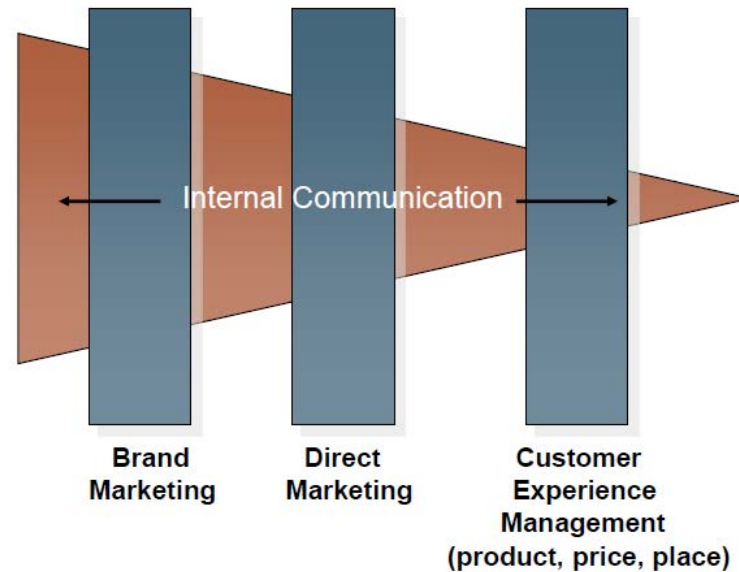
technologies. Marketing is not 'commercialisation'. It is a way of thinking and doing within every student support service, unit, department and division of the Open Campus. Everyone has to be well-versed in all of what it will take to compete for students, money and reputation and all of us have to work as a team to be successful.

In our distributed Open Campus environment, we are dealing with a culture of multiple markets so we have to consider the collective, as well as the individual markets. With our difficult financial situation, the most practical marketing strategy indicates that we should be able to incorporate all of the different market approaches into one cohesive and inclusive marketing plan, which is specifically tailored to the marketing environment. Our main aim is taking prospects from where they are to where they want to be academically or professionally or working with them in community development programmes and outreach services.

Currently, our major weakness is that we are not operating in a data- or forecast-driven environment. Our culture tends to depend on 'gut-feelings', which cannot be measured. Our communication and administrative systems need to rely on actual data – collected and analysed regularly – through our research, planning and registration processes - to drive our plans and initiatives. Marketing and Communications conducted a market survey in 2009/2010 which forecast that our traditional target market of adult students was trending younger (under 31). These data were used as additional information to update our messaging in our advertising and in other promotions to better utilise our scarce marketing resources. We also used all available UWI data.

However, we will have to now incorporate a more data-driven process across all OC Divisions and departments which deal with marketing activities, in order to make better and more focussed marketing decisions and for more accurate forecasting. This new way of thinking and doing our marketing business is the central theme of this current marketing plan in keeping with the strategic framework of the UWI and the Open Campus.

Integrated Marketing



Ten Steps to Integrated Marketing (Lauer, 2002)

Objective: To adapt the latest thinking about integrated and relationship marketing to the academy in order to enhance competitiveness and organizational effectiveness, especially as they relate to visibility, admissions, fund raising, alumni relations, curriculum planning, student programmes planning, and overall morale.

Essential Factors:

1. Set up an internal education *process* to establish marketing as *a way of thinking* throughout the organization, concentrating on *opinion leaders*.
2. Clarify *mission* and *vision* and translate them into a *competitive-advantage*-based message, and then get everyone *on the same page*.
3. Establish a strategic marketing task force as an activity of the Deputy Principal's Office and find a *champion* in the management or Council teams to help promote the processes.

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4. Identify *market segments* and the *opinion leaders* within them, including *internal segments*.
5. Do an *audit* of current marketing communication for *consistency of identity, message and intensity*, review the audit with the *market segments* in mind.
6. Establish ongoing *survey and focus group* research for *each market segment* to assess *awareness, attitude, knowledge* and *price elasticity*.
7. Determine *priorities* and set goals, i.e. more applications and greater visibility.
8. Establish *action teams* for *market segment initiatives*, and then outline an *action blueprint*.
9. Focus on branding the institution and plan *visibility*, determining with whom and at what cost.
10. Build feedback *evaluation* into the total process as a part of research, planning and team discussions.

The UWI Brand – (from its Brand Identity Guidelines)

Our Brand

Our brand is more than our name, our logo, our products and services. Our brand is our attitude, our way of doing things, of behaving, of communicating. It is a consistent expression of who we are both visually and orally. Our pride in the UWI brand is based on knowing that we are meeting the needs of Caribbean people and the region.

Our Brand Promise

Our UWI promise is embedded in our commitment to serve the Caribbean and its higher education needs with pride and excellence.

That Caribbean pride and excellence is what we want to communicate and what we want people to think of when they see our brand. This is what the UWI brand is all about.

We live the UWI promise by striving to embody the core values of our institution. But it is equally important to express the brand in all our different communications, products and services.

Our brand promise is directly linked to our mission, vision and core values.

Following the guidelines outlined in this manual is tangible way of living the UWI promise.

Our Brand Attributes

Our brand attributes are the words that we want our target audiences to associate with The University of the West Indies. We use these words and phrases to reinforce what we know to be true about UWI, and to help our constituents understand the essence of our brand promise. There are a few words or phrases that form the bastions of the UWI brand:

- *Proud Caribbean/West Indian Heritage/Tradition*
- *Unlocking Your Potential*
- *First*
- *Opportunity*
- *Caribbean integration*
- *Caribbean excellence*

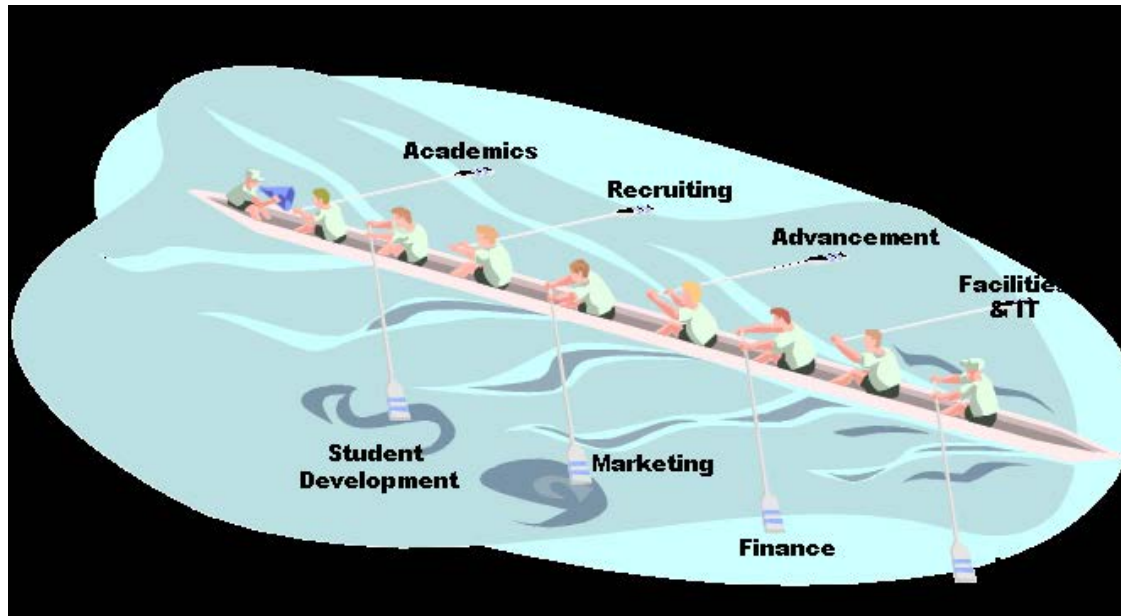
Our Creative Platform

The concept of creative consistency is what underpins the projection of the brand promise. The development of the creative platform begins with the question: “what creative elements will best communicate our brand promise?” The Creative Platform is the brand’s specific and own-able point of view — its distinctive aesthetic — giving the brand a defined look and feel and providing a bridge from promise to consistent execution. It allows for the creation of visual and editorial messages that leverage the unique benefits of UWI in a manner that appeals to our target audiences. These messages are communicated in a tone, manner, look and feel that elevates the brand promise consistently across all media.

Our creative platform consists of our:

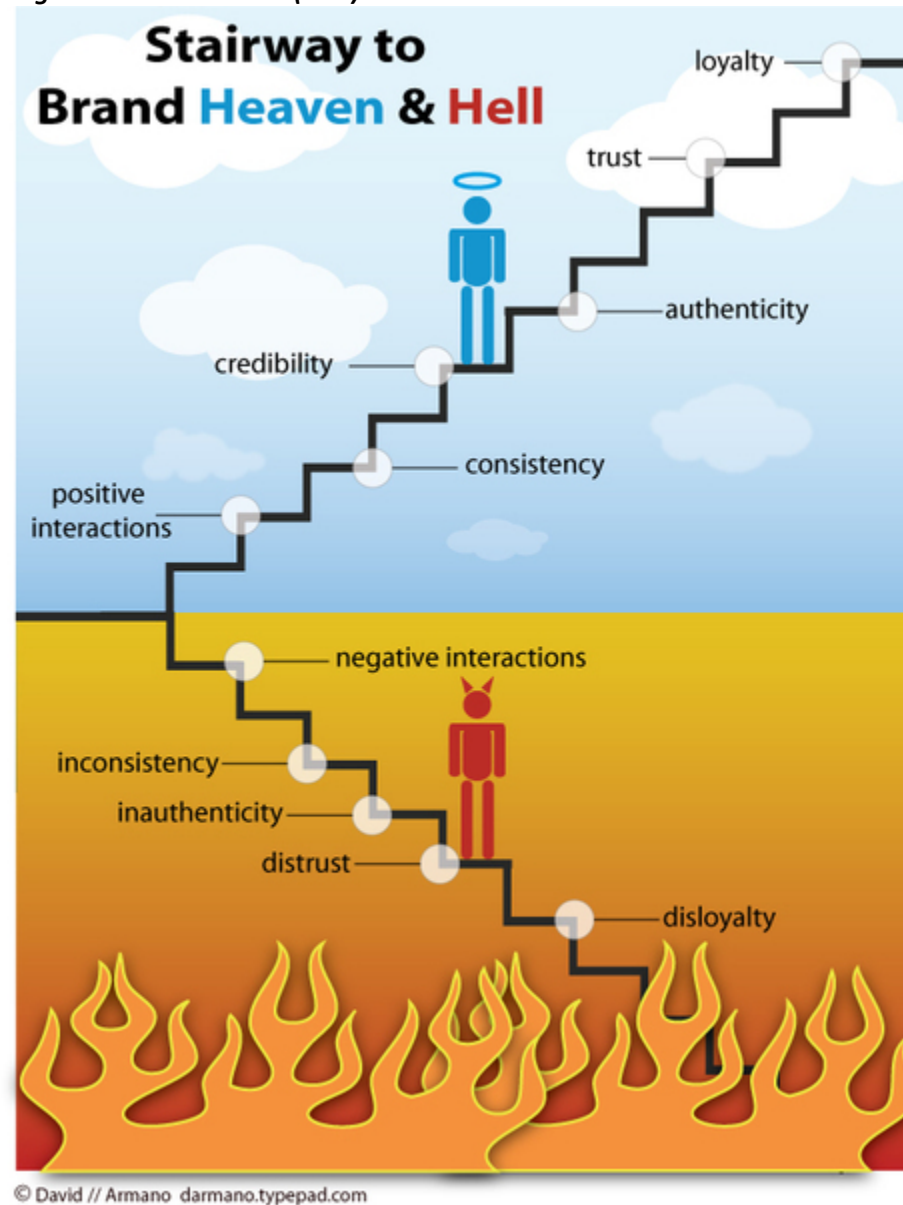
- *Visual identity guidelines*
- *Creative elements*
- *Editorial style guidelines*
- *Web style guidelines*

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HE Brands Are “Lived” Through 10 Domains

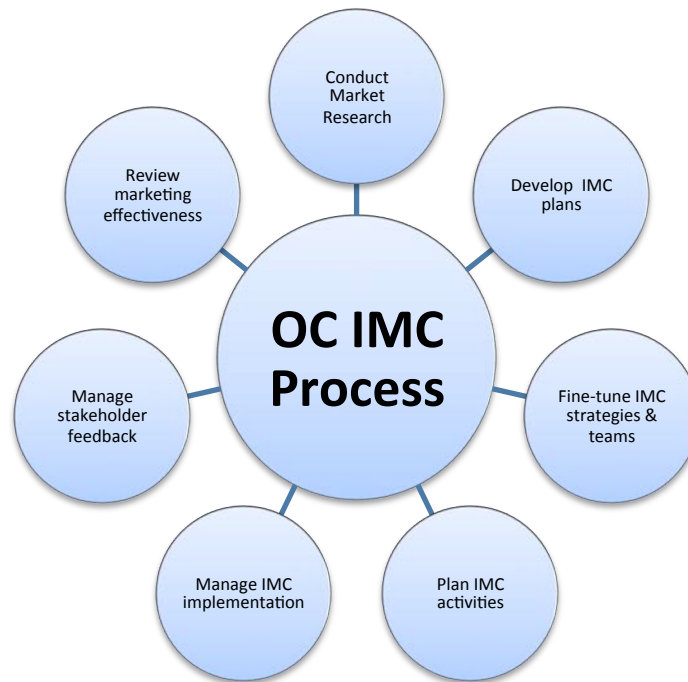


1. Mission and Vision
2. Finance and budget
3. Academic affairs
4. Student recruiting and financial aid
5. Student development/retention
6. Institutional advancement and alumni relations (fundraising)
7. Facilities planning
8. Information technology
9. Brand marketing and integrated marketing
10. Human resources

Where are we?



Contextualising the Plan:



The Role of the Marketing and Communications Department

The UWI Open Campus is the fourth Campus of the regional University of the West Indies, a major teaching, research and outreach university in the Caribbean serving 16- English-speaking nations. The Campus was positioned as the distance education and professional development arm of the University serving the higher education needs of more communities throughout the region through innovative pedagogic design, relevant research and outreach programmes. The marketing and communications department of the campus develops strategic plans and initiatives to build the Campus's and the University's reputations and for overseeing the development of communications support and materials for student recruitment and retention and fund-raising. The department seeks to communicate a better and wider understanding of the Campus's strengths, character, principles and goals. It analyses audiences, designs messages, and selects media to support these objectives. The department hopes to increase and improve its creative team with the relevant skills and improved process mapping to better its approach to marketing and communication problem-solving, especially through offering services in:

- (1) Brand Marketing**
- (2) Direct Marketing**
- (3) Digital/Web Marketing**
- (4) Collateral Development**
- (5) Editorial Services & Publications**
- (6) Special Projects & Development Communications**
- (7) Market Research**

The Open Campus 2012-2014 Integrated Marketing Plan reflects the University's and the Campus's 2012-2017 strategic goals and objectives, specifically supporting the achievement of the highest levels of excellence in six key areas:

- (1) Financial**
- (2) Employee Engagement and Development**
- (3) Internal Operational Processes**
- (4) Teaching and Learning**
- (5) Research and Innovation**
- (6) Outreach and Internationalisation**

Financial: The UWI Open Campus will position itself through its admissions marketing strategies as offering its students a chance to save more money by staying in their own home countries instead of going to overseas-based educational institutions. Its programmes are also priced at a point where completing a quality university degree can be very affordable for many when actual price comparisons are made. The financial sphere in the Open Campus is also being enhanced with the development of increased ease of fee payments, scholarships and bursaries and investments being made in facility improvements and additions of new facilities and technologies that dramatically improve the quality of its academic programmes and services and student quality of life, wherever they are located.

Employee Engagement and Development: People drive the success of the Campus and the information about faculty/e-tutors/academic and administrative staff (and student) achievements, projects and events must be communicated regularly to all OC stakeholders.. The Campus must also work to appoint and train spokespersons across divisions to help them organize and prepare key talking points and fact sheets that reflect the University's and the Campus's official positions to maximize media exposure. The Intranet will be re-designed

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and upgraded for more user-friendly interactive staff involvement. Assigned web content managers will be continuously trained. More staff will be hired, re-deployed or re-trained for OCMAC in design, desktop publishing, multimedia production, web editing, electronic media management, production and media budgeting, copyediting and writing, event and media management and fund-raising. OC staff in general will continue to be trained to conform and maintain The UWI's quality brand identity standards, including its Visual Identity Guidelines.

Internal Operational Processes: Current and new publications, including the *Open Letter*, the *Principal's Update*, the *HR Have You Heard* bulletin, the CSDR's newsletters, etc. will continue their primary goals of getting news and information to their various target groups and to reinforce the feeling of community between staff, students and stakeholders with people-oriented features and profiles. Web content management processes, including social media management, will be tightened and enhanced. Databases of media, key stakeholders, including alumni, will be regularly updated and used to disseminate direct marketing information or to collect data. Media placements processes will be coordinated centrally and online so that departments can discuss and share their media plans. Intuitional advertising will be done centrally to develop consistent messages and concepts with targeted priority audiences in the region/communities. Some departments have advertising budgets, which should also be centralised to ensure economies of scale are practiced throughout the Campus.

Teaching and Learning: The Marketing and Communications department will continue to position the Campus as offering the same high-quality undergraduate and graduate educational experience as its sister campuses and is committed to work with the Registry and other OC divisions to further improve admissions, graduation and retention rates. Admission standards, student growth and resources to support student success will also be aligned and addressed here as detailed in the University and Campus 2012-2014 Operational Plans.

Research and Innovation: Specialised community research and outreach services are what distinguish the Open Campus from other competing overseas universities in the region. Through working with the Consortium for Social Development and Research on specially targeted IMC plans and strategies, the Campus will look to increase the knowledge, demand and culture for research across the region, while seeking to attract more funding, the best research faculty and graduate students writers and researchers in relationship-building projects with UWI sister campuses and international agencies to further enhance its income and prestige.. Another innovative strategy begun by the Open Campus in 2009/10, the *Cruise and Learn Scholar Ship* programme, will seek to launch its second sailing in 2013, targeting international graduate students and faculty from universities from around the world to learn about the research work of the Caribbean in various disciplines.

The Role of the Open Campus Marketing and Communications Task Force: A Proactive Agenda

Day-to-day marketing activities take place in various departments in various divisions of the Open Campus. These include undergraduate admissions, graduate admissions, communications, media relations, government relations, special events, extended education, staff and

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student games, fund-raising, student affairs programmes, bookstores, library services, ICT services, international programmes and more. Currently, the marketing functions of the Campus are highly dispersed across the various countries and divisions in which the campus operates. However, working towards a more holistic process, the Campus's overall marketing priorities will now work through major initiatives that will be coordinated through three levels of advisory and implementation groups. These groups will report directly to the Office of the Deputy Principal and will be managed by the Marketing and Communications Department.

The OC Marketing Advisory Board

This Board will have representation from all the marketing-related departments and divisions of the Campus, students and Council. It will meet two or three times a year to (a) organise an interdisciplinary, campus-wide marketing team to assist in aligning the marketing plan for the OC with the one for the University. Members of the Board will be represented from a cross-section of the University and Campus and will include staff from the Office of the Vice-Chancellor (Marketing & Communications Office), the Office of the Principal, the OC Office of Finance, the Office of the Registrar (Recruitment & Student Support), Academic Programming & Delivery (Graduate, Undergraduate & CEP), the Consortium for Social Development & Research, and the Open Campus Country Sites.

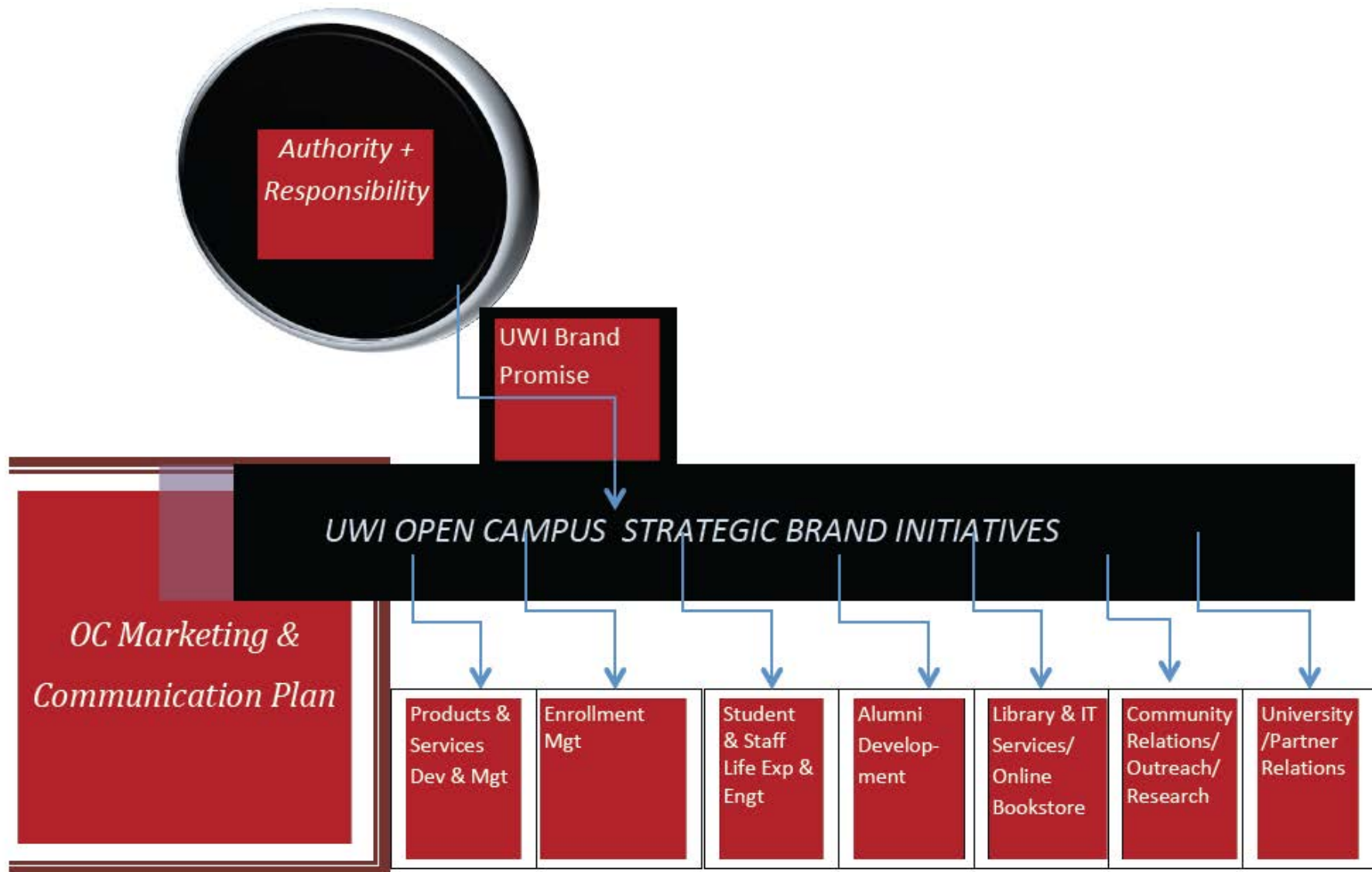
The OC Marketing Management Committee

This committee will translate the ideas of the Advisory Board into strategic implementation plans and the accompanying budgets. Its members will include assigned marketing and communications professionals from the OCMAC department, and will include the chairs of specific marketing action groups from across the Campus divisions and countries. During a series of monthly meetings, the committee will (1) set overall marketing priorities, (2) review and approve specific target marketing initiatives, and (3) oversees marketing research projects.

The OC Marketing Action Groups

The OC Marketing Management Committee will create specific action groups to implement priority strategic marketing initiatives. These groups are small and consist of persons with key skills to help implement projects in the areas of:

- (1) Products & Services Development and Management
- (2) Enrollment Management (recruitment –admissions – transition – orientation– registration – graduation– alumni)
- (3) Student & Staff Life/Experience & Engagement
- (4) Alumni Development
- (5) Library & IT Services/Online Bookstore
- (6) Community Relations/Outreach/Research
- (7) University/Partner Relations



Communications

There will be several administrative areas of communications activities that have to be defined more clearly by the Marketing and Communications department as it implements this plan. These areas of communication will (1) support the work of the marketing Advisory Board and the Marketing Management Committee and Action Groups; and (2) manage the day-to-day communications and information activities of the Campus. Some of these activities already take place across OC Divisions and departments, in Academic Programming and Delivery, the Open Campus Country Sites, The Consortium for Social Development and Research, the Human Resources Department and the Registry.

Some of these activities include:

- (1) Writing news releases, op-ed pieces and newsletters
- (2) Producing student and staff publications/catalogues/promotional material
- (3) Handling News-Media Relations
- (4) Internal communication directories
- (5) Organising multimedia production projects
- (6) Producing experts guides, speakers' notes and speeches
- (7) Research advertising opportunities
- (8) Maintaining photo catalogues and staff biographical data
- (9) Desktop publishing
- (10) Event and special projects management
- (11) Preparation of admissions marketing material

There is need for oversight and coordination of these *ad hoc* activities across the Open Campus in order to better align and manage resources through process mapping of these various communications activities between the various OC Divisions and departments and the marketing and communications department for improved message design and timing adjustments.

Major Strategic Goals/Executive Summary

Prioritised Strategic Goals of the 2012-2014 Open Campus Integrated Marketing Plan – Years 1 & 2 (based on the Open Campus's 2012 Strategic Options)

1. To consistently and effectively position the differentiated products, services, people and student experience of the UWI Open Campus as a respected, quality, ranked and competitive sub-brand of the University of the West Indies.
2. To expand the UWI Open Campus footprint across the region by increasing recruitment and retention strategies for all tiers of undergraduate and graduate students in key areas of specialization, as well as working persons who wish to pursue continuing and higher education.
3. To increase public knowledge and awareness of the outstanding quality of OC research, scholarship, facilities and Caribbean economic, social and cultural development impact, especially within the UWI-12 countries.
4. To promote and support the building of strategic networks regionally and globally to support the University's mission and vision and core values in order to raise funds, attract positive news coverage and build our online community.
5. To increase levels of internal communication among students, teaching and administrative staff across the Open Campus through the creation of better inter-departmental alignment and system integration to support the core business of the Campus.

Situational Analysis

The UWI Open Campus operates in a turbulent, competitive and uncertain marketplace in higher education across the region. Much of its work mirrors that of its sister campuses, so better alignment of the primary *purpose* of the UWI Open Campus must be agreed upon by the University's leadership in order to reduce the barriers to market both the institution and the Campus. Other challenges include:

- growing operating costs
- changing student demographics
- spiraling national inflation and increasing COL
- mounting demands for accountability by taxpayers and governmental bodies
- competing for students and faculty
- competing for funding and private support,
- increasing quality assurance regulation
- intensifying expectations among students, parents, alumni, faculty and staff, and
- diminishing Government support

This plan specifies proactive integrated marketing actions that the Marketing and Communications department, through the Office of the Deputy Principal, and with the support of other OC Divisions and departments must use the next 12-18 months to help guide and positively influence the perception of the UWI Open Campus. Messages must be designed to target and convince not only prospective students, but also those influential key audiences, that the Open Campus is indeed a campus for the times and a campus for our future, and that it is competitive with the best in the world. The Marketing and Communications department **must** be funded and staffed appropriately to take a strong leadership role in seeing that these goals are achieved, working cooperatively with every constituency, both internal and external, who is supportive of the UWI's future.

Process Mapping

It is very important to note that in order for an integrated marketing and communication strategy to be executed well, all members of the OC team must familiarise themselves with the process and have a space to see the progress of initiatives and to input developments. All OC staff must be advised that each contact that we make with a member of our target audience should serve a strategic purpose, enhance our unique story, and be made at the optimal time. Ensuring that this is the case with our communication flow is easier said than done.

One way that this can be done, is to adopt a process mapping technique. Process mapping is a collaborative review and mapping of all the materials that comprise our communication sequence for recruitment communications, inquiry generation programmes, and student/alumni/donor campaigns. Because this exercise will identify missed opportunities as well identify any over-saturation in our markets, it can lead to a reduction in costs, an increase in student conversion rates, and improvements in the overall return on investment.

Process mapping is a visual representation of all communication-related elements:

- Measuring marketing
- Source codes concept
- Mapping the communication sequence – from initial inquiry to enrolled student
- Technology
- Resources
- Timing
- Planning & revising
- Training

An Example of Process Mapping for Admissions Marketing:

Admissions Funnel by First Inquiry Source													
First Source Inquiries	COUNT				PERCENT OF TOTAL				YIELD				
	prospect	applicants	admits	matrics	prospect	applicants	admits	matrics	applicants prospects	admits applicants	matrics admits	matrics prospects	
Self Initiated													
Call													
Walk In													
Web Inquiry Form													
Test Scores													
Application													
E-mail													

Source Categories

- Self-Initiated
- Events
- Referrals
- Purchased Lists
- List Responders

Self-Initiated Inquiries

- Call
- Walk-In
- Web Inquiry Form
- SEM Form
- E-mail
- Application

Yield by Category & Source

- Applicants from prospects
- Admits from applicants
- Matrics from admits
- Matrics from prospects

SWOT Analysis

Strengths	Weaknesses	Opportunities	Threats
The UWI OC Leadership & Champions <ul style="list-style-type: none"> • Chancellor • Vice-Chancellor • Council • Teaching & administration staff • Quality assurance issues being addressed 	Lack of Funding for <ul style="list-style-type: none"> • Market research and process mapping for IMC marketing strategies • Scholarships, bursaries, funding ops for student retention • Accelerated product and service development and offers • The vision and mission of the OC is somewhat blurred 	Educate audiences on what we do at the UWI OC <ul style="list-style-type: none"> • Future business and community leaders • Civic partnerships • Outreach • Research • NGOs • International agencies • Donors • Sponsors 	Competition with: <ul style="list-style-type: none"> • International educational institutions • Sister UWI campuses • National educational institutions • Frustrated staff and students
The Spirit of The UWI <ul style="list-style-type: none"> • The traditions and pride of being a part of the oldest and most prestigious University in the region • The unique culture of the Caribbean • Beautiful and diverse countries and site locations 	Lack of Communication <ul style="list-style-type: none"> • Among campus units, departments and divisions • Unclear roles and expectations • Cultural differences, some nationalism 	Research Mission <ul style="list-style-type: none"> • Economic and Social Development • Information Technology • Return on Investment 	Lack of Funding <ul style="list-style-type: none"> • Faculty, Admin., Staff, and student recruiting • Deferred academic programmes • Physical site maintenance • Technology upgrades • Advertising, Sales & Promotions

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Distance Learning <ul style="list-style-type: none">• Been at it for over 50 years• Specialized technologies• Innovative learning experiences	Poor Customer Service <ul style="list-style-type: none">• Students feel they get the run around• Poor counseling and advising	Games, Sports, Tech Programmes <ul style="list-style-type: none">• Nationally-ranked teams• International competitions• Regional playoffs• Tech Events	Don't deliver what we promise to students <ul style="list-style-type: none">• Word-of-mouth of bad service & products could scare away new students• Poor customer service reconfirms that the UWI is big and impersonal
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UWI Open Campus Core Values and Key Messages

Core Values - *Student-Centred, Agile, Accessible, Enabling*

The UWI Open Campus has pledged to place its students at the centre of all its planning processes. The Campus's unique position working with the wider UWI to effectively serve the people and communities across the Caribbean and its diaspora, cultivates its ability to offer students a nationally competitive undergraduate/graduate academic experience, with the uncommon opportunity to participate in outreach and research projects in many curricula.

It will be critical for administrators, e-tutors, staff and students across the campus to keep these Core Values in mind at all times, particularly when we are communicating with our external audiences, when creating new integrated marketing plans, new marketing materials, etc. The focus of the Key Messages should be aimed at influencing key audiences. We should continue to take advantage of every opportunity to showcase the UWI Open Campus's academic excellence and its outstanding research in order to reach the goals of the UWI 2012-2017 Strategic Plan.

As a campus for the times and a campus for the future, the Open Campus is on the move to ensure "that the high quality university education, research and services available at our institution should be open and available to all people who wish to reach their full potential inside and outside of the Caribbean region" (from the *Open Campus Guiding Principles*).

Key Messages

Key messages are facts that must be stated consistently in any and all formal campus communication. These backbone messages form the critical underpinnings, of the integrated marketing communication effort and must be constantly repeated, both internally and externally. Marketing and communications recommends the following as the UWI Open Campus's key messages:

- (1) The UWI Open Campus is a nationally-competitive public entity of higher education, pursuing themes of academic quality, student engagement and experience, open and distance education, research and innovation, and outreach services. (National)
- (2) The UWI Open Campus serves the English-speaking Caribbean, through the UWI, as the primary academic and intellectual generator of economic, cultural and social development. (Regional)

Target Audiences

These target audiences will be prioritised carefully based on the specific marketing goal/project, whether at the site, national, or regional levels. There are many target audiences with whom the Open Campus must communicate with, or inform, or influence. These audiences, which are carefully selected by the Marketing and Communications teams are of strategic importance. This integrated marketing plan focuses primarily on influencing those people who will significantly impact the future of the UWI Open Campus as a regionally and internationally competitive campus for the times and for the future.

The first and foremost goal is to keep positioning the UWI Open Campus as having the same standard of academic excellence as is found at her sister campuses, as well as other top-level competing universities across the region. Our integrated marketing and communications efforts can get this message across if we work together to send consistent and targeted messages that work to counter regional bias while focusing on our many outstanding student and faculty accomplishments.

Audiences

- (1) Academically-qualified prospective students from ages 18+ in Caribbean and key diaspora markets.
- (2) Competitive undergraduate and graduate students in targeted disciplines.
- (3) Qualified mature students (over 30) with significant working experience.
- (4) Prospective students who wish to undertake professional and continuing education programmes.
- (5) Key influencers (peer institutions like our sister UWI campuses) and other similar stakeholders.

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- (6) Caribbean Governors General, Prime Ministers, Ministries of Education, NGOs, International Agencies.
- (7) Caribbean Business and Opinion Leaders.
- (8) UWI internal audiences, (students, staff, faculty and alumni).
- (9) Donors and potential donors.
- (10) Prospective new research faculty.

Target Geography

The under-served rural and urban areas of the English-speaking Caribbean.

Anguilla
Antigua & Barbuda
Bahamas
Barbados
Belize
Bermuda
British Virgin Islands
Cayman Islands
Dominica
Grenada
Jamaica
Montserrat
St Kitts & Nevis
St. Lucia
St. Vincent & the Grenadines
Trinidad & Tobago
Turks & Caicos

There are some specific cities/states in the Caribbean Diaspora related to recruitment of prospective out-of-region undergraduate and

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graduate students that are of prime importance to meeting the goals of this plan. Those locations are:

Atlanta
Birmingham
Fort Lauderdale
Miami
London
New York
Toronto

Major Strategic Goals

All of the following major strategic goals, headed under the Marketing and Communications Services, are intended to ultimately support the Open Campus's transformation into a nationally-and regionally-acclaimed campus of the UWI with globally competitive and acknowledged research and outreach services.

Prioritised Strategic Goals of the 2012-2014 Open Campus Integrated Marketing Plan – Years 1 & 2 (based on the Open Campus's 2012 Strategic Options)

1. To consistently and effectively position the differentiated products, services, people and student experience of the UWI Open Campus as a respected, quality, ranked and competitive sub-brand of the University of the West Indies.
2. To expand the UWI Open Campus footprint across the region by increasing recruitment and retention strategies for all tiers of undergraduate and graduate students in key areas of specialization, as well as working persons who wish to pursue continuing and higher education.
3. To increase public knowledge and awareness of the outstanding quality of OC research, scholarship, facilities and Caribbean economic, social and cultural development impact, especially within the UWI-12 countries.
4. To promote and support the building of strategic networks regionally and globally to support the University's mission and vision and core values in order to raise funds, attract positive news coverage and build our online community.

UWI Open Campus Integrated Marketing & Communications (IMC) Plan 2012-2014

5. To increase levels of internal communication among students, teaching and administrative staff across the Open Campus through the creation of better inter-departmental alignment and system integration to support the core business of the Campus.

Marketing and Communications Services

- (1) Brand Marketing
- (2) Direct Marketing
- (3) Digital/Web Marketing
- (4) Collateral Development
- (5) Editorial Services & Publications
- (6) Special Projects & Development Communications
- (7) Market Research

MARKETING TACTICS



Question: Which Strategy for the OC?

Red Ocean Strategy Focus on current customers	Blue Ocean Strategy Focus on noncustomers
• Compete in existing markets	• Create uncontested markets to serve
• Beat the competition	• Make the competition irrelevant
• Exploit existing demand	• Create and capture new demand
• Make the value-cost trade-off	• Break the value-cost trade-off
• Align the whole system of a firm's activities with its strategic choice of differentiation <u>OR</u> low cost	• Align the whole system of a firm's activities in pursuit of differentiation <u>AND</u> low cost

Answer: Sharing of Internal Data, Market Intelligence and Market Research – However, one blue ocean will compensate for a lot of red oceans.

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Towards a Useful OC Marketing Information System



A marketing information system (MIS) consists of people, equipment, and procedures to gather, sort, analyse, evaluate, and distribute needed, timely, and accurate information to marketing decision-makers. First, it interacts with these managers to assess information needs. Next, it develops needed information from internal company data, marketing intelligence activities, marketing research, and information analysis. Finally, the MIS distributes information to managers in the right form at the right time to help them make better marketing decisions (*Kotler & Armstrong, 10th ed.*) The information needed by marketing managers can be obtained from internal data, marketing intelligence, and marketing research. The information analysis system then processes this information to make it more useful for managers.

However, a good marketing information system balances the information managers would like to have against what they really need and what is feasible to offer. Some managers will ask for whatever information they can get without thinking

carefully about what they really need. Too much information can be as harmful as too little. Other managers may omit things they ought to know or may not know to ask for some types of information they should have. Sometimes the institution or company cannot provide the needed information, either because it is not available or because of MIS limitations. For example, a brand manager might want to know how competitors will change their advertising budgets next year and how these changes will affect industry market shares. The information on planned budgets probably is not available. Even if it is, the company's MIS may not be advanced enough to forecast resulting changes in market shares.

Finally, the costs of obtaining, processing, storing, and delivering information can mount quickly. The company must decide whether the benefits of having additional information are worth the costs of providing it, and both value and cost are often hard to assess. By itself, information has no worth; its value comes from its use.

TIME FRAME

This integrated marketing communications plan will be in effect from August of 2012 to August of 2014. This two-year time frame is in keeping with the overall UWI's call for all its campuses to have their preliminary two-year operational plans in place for implementation to Semester I 2014/15. This time frame is also necessary to engage more effectively by following new processes and communication systems with the other key divisions and departments of the Open Campus. The time frame is also necessary to truly evaluate the progress of the IMC plan and to create a manageable production schedule encompassing two phases.

Phase I – August 1, 2012 to August 1, 2014

Complete electronic and print publication pieces and produce collateral material for Goals #1, #2, #3 and #4
Complete websites and other deliverables for Goals #1, #2, #3, #4 and #5

Phase II – December 2012 – March 2014

Complete research projects and publication components for Goals #3, #4 and #5
Revise all student (and staff) recruitment, admission and orientation material and OC internal and external publications
Create a single integrated OC social media framework for current students
Complete student innovation project
Complete production of collateral support for OC Peers project

MARKETING ACTION PLANS

Marketing Action Plans are tactics that help to achieve the Major Strategic Goals---they are the means by which the goals are accomplished. The following are some of the Major Strategic Goals and their associated actions.

- **MAJOR STRATEGIC GOAL ONE:**

To consistently and effectively position the differentiated products, services, people and student experience of the UWI Open Campus as a respected, quality, ranked and competitive sub-brand of the University of the West Indies.

ACTIONS TO ACHIEVE GOAL

- Increase visibility, perception, and web ranking of the Open Campus by launching an ambitious and fully-integrated multi-media communication plan, encompassing local, national and regional objectives.

Provide talking points and information kits to key spokespersons
Redesign/Update Open Letter
Create a new Open Magazine publication with ad sales
Begin process for an OC Online Radio Station
Organise for second Scholar Ship Cruise
Maintain and update Websites, Web links, Web Spotlights, Web Surveys, Web Analytics
Create Online Virtual Site Tours and Online Book Store for the OC
Continuously create and update specialised databases for direct mail marketing
Organise National Forums, Seminars, BBC Training Workshops
Ensure that the UWI Open Campus sub-brand is on all publications, ads, etc.
Update and share regional and national media database and media placement process
Ensure increased regional and national Editorials and improved media relations
Print and electronic advertisements, billboards, Regional Airports signage, Yellow Pages/online
Create Radio spots/PSAs, TV and radio interviews
Prepare newspaper inserts in key markets, primarily highlighting research and innovation and student accomplishments
Facilitate public relations strategies for Principal's regional visits to key stakeholders and sites
Organise national media tour itinerary for Chancellor, Vice Chancellor & Council Chairman as OC Champions
Continue to aggressively seek national and regional media coverage of UWI Open Campus
Develop closer working relationships with local/national/regional media outlets
Solicit stories on major Open Campus programmes, research, outreach and people
Develop stronger ties with UWI liaisons working on the Open Campus's behalf
Make selective national advertising placements in Chronicle of Higher Education, and other targeted publications
Assist key academic leaders with placement of by-lined articles in their scholarly and professional publications
Assign responsibility to OC Marketing Action Teams
Work with Marketing Advisory Board/Committee/leadership/staff to craft marketing /promotional plans & specific strategies
Regularly benchmark OC's IMC progress against similar institutions.

UWI Open Campus Integrated Marketing & Communications (IMC) Plan 2012-2014

Target Audiences: (1) through (8). Timeline: Year 1. Assigned to: Marketing & Communications, Marketing Action Groups

• MAJOR STRATEGIC GOAL TWO:

To expand the UWI Open Campus footprint across the region by increasing recruitment and retention strategies for all tiers of undergraduate and graduate students in key areas of specialization, as well as working persons who wish to pursue continuing and higher education.

ACTIONS TO ACHIEVE GOAL

- Begin dialogue and work on specific marketing plan with the Registry, APAD, and OCCS to determine best ways to recruit students into the OC.
 - Conduct and review market research to determine how OC programmes are perceived against major competitors and to determine key attributes important to prospective students. Include situation assessment, target market assessment, competitive analysis, and positioning and communication strategy.
 - Design/produce colorful, interesting, informative application packets with deadline dates, checklists of items to accomplish, opportunities at OC, etc.
 - Prepare and distribute OC memorabilia for sales at recruitment fairs and online- shirts, caps, mugs, pens, jump drives, bags, etc.
 - Create a regional campaign to promote the UWI Student/Faculty Tablet Project in association with the OC Library, APAD & CATS
 - Aggressively work to recruit academically-qualified or PLA students
 - Prepare a online OC Student Viewbook with professional pictures of OC Student Life
 - Organise visitation programmes especially in the Diaspora
 - Organise actual and virtual OC sites tours
 - Create and foster welcoming atmosphere for all students
 - Educate/recruit students as undergraduates about graduate opportunities
 - Educate/recruit students in professional or continuing education about undergraduate and graduate opportunities
 - Have current students assist in recruitment process
 - Evaluate available financial aid, mentoring and peer support for students
 - Consider a programme to include OC alumni and UWI faculty
 - Advertise in local and national college guides with specific programmes, e.g CaribbeanJobs.com
 - Participate in recruiting fairs, forums and conferences
 - Design dedicated student recruiting Web site with helpful index and welcome page
 - Highlight benefits of the UWI OC and specific departments
 - Promote academic quality, faculty quality, geographical locations, technological highlights, etc.
 - Communicate often and well with all prospective and current students through regular publications, OC messaging, social media
 - Utilise current students in recruitment promotion process with testimonials, photographs, etc.
 - Ensure comprehensive and aligned regional orientation communication activities
 - Direct Marketing multi-channel initiatives
 - Reach the student where they want to be reached
 - Implement campaigns utilising not only postal, but e-mail and the Web as well
 - Explore new technologies (text message response, VDP response postcards, etc.)
 - Have consistent design across channels
 - Ensure design of e-mail and online landing pages reflect look of offer letters

UWI Open Campus Integrated Marketing & Communications (IMC) Plan 2012-2014

Target Audiences: (1) through (4). Timeline: Year 1. Assigned to: Marketing & Communications, Marketing Action Groups, Office of the Principal (Research) Registry, APAD, Library, CATS

- **MAJOR STRATEGIC GOAL THREE:**

To increase public knowledge and awareness of the outstanding quality of OC research, scholarship, facilities and Caribbean economic, social and cultural development impact, especially within the UWI-12 countries.

ACTIONS TO ACHIEVE GOAL

- Work cooperatively with the Consortium for Social Development and Research (CSDR) to write an IMC plan.
- Promote key research CSDR stars and achievements through CSDR publications. Annual Report, etc.
- Create, index and publish searchable web pages for CSDR publications and projects on the OC public website.
- Ensure that CSDR research and outreach articles are regularly written and published in the new Open magazine.
- Arrange for aggressive publicity of regional CSDR public lectures & workshops including live-streaming and recording.
- Plan Chancellor's Media Luncheons that focus primarily on research & outreach and its contributions to Caribbean development.
- Organise for regular media appearances on national talk shows, etc.
- Develop a OC/CSDR 'Cooperative' website to include outreach resources and information for more student/stakeholder engagement.
- Develop e-research, open content logos and links for our websites with the OC Librarian.
- Develop purposeful online videos and radio content.
- Oversight of UWI branding at events
- Production and dissemination of training manuals and webinars

Target Audiences: (1) through (8). Timeline: Year 1. Assigned to: Marketing & Communications, Marketing Action Groups, CSDR

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- **MAJOR STRATEGIC GOAL FOUR:**

To promote and support the building of strategic networks regionally and globally to support the University's mission and vision and core values in order to raise funds, attract positive news coverage and build our online community.

ACTIONS TO ACHIEVE GOAL

- Organise for Search Engine Marketing campaign to target keywords most relevant to our business like Google, Yahoo and Bing.
- Organise for OC online pop-up ads on Google.
- Create bold, attractive, coordinated general brochures and advertisements with dynamic, inviting copy and visuals for insertion in high-impact publications across the region and in select overseas markets.
- Build in more opportunities on public OC website to generate inquiries.
- Share more web analytics with internal and external stakeholders
- Design/build coordinated, interactive OC web pages specifically for prospective donors and sponsors.
- Organise OC alumni events and community support occasions linked to OC programmes across and outside of region
- Work closely with UWI Planning & Development Office and M & C Office to use HE industry metrics to further define OC goals.
- Work closely with CATS and the Registry to use updated enrollment metrics originating from source codes and historical data.

Target Audiences: (5) through (8). Timeline: Year 1. Assigned to: Marketing & Communications, Marketing Action Groups, Office of the Principal (Research) Registry, APAD, Library, CATS

UWI Open Campus Integrated Marketing & Communications (IMC) Plan 2012-2014

• MAJOR STRATEGIC GOAL FIVE:

To increase levels of internal communication among students, teaching and administrative staff across the Open Campus through the creation of better inter-departmental alignment and system integration to support the core business of the Campus.

ACTIONS TO ACHIEVE GOAL

Develop a more comprehensive and instinctive communication system within the OC in association with HR, UWI M & C and CATS.

Put together strategic internal communication plan in coordination with HR to better inform internal audiences of key messages.

Create new culture of communication where everyone knows University goals, etc.

Send constant reminders to all OC staff and students that they must use the 'open' email address (not dec) when sending out OC emails.

Develop continuous communication and Web training programmes with Training Coordinator & Web Coordinator

Update and encourage staff to use the OC internal communication tools (e.g. Intranet, eNews Messaging service< Intranet) on a regular basis.

Develop annual communication planning and event calendars.

Create a space on the UWI Intranet for 'Stress Relief', including meditation techniques, classical music, desk exercises, mind puzzles, etc.

Organise regional/international online games competition for OC staff and students.

Continue to plan staff and student special awards events – using videoconferences and alternative media.

Manage dissemination of Management messages through local meetings, etc.

Conduct media relations training for key e-tutors/faculty, administrators.

Participate actively in OC student and staff orientation.

Educate the entire campus about integrated marketing; marketing in changing and new markets.

Create a professional OC video presentation and deliver to key audiences.

Launch a TEAM OC initiative to introduce the marketing advisory committee: include individuals from across region; to meet twice annually.

Present regularly UWI M & C and UWI Planning & Development to keep them informed of marketing goals and progress.

Use new HR "Have You Heard" bulletin and Intranet to educate employees about marketing, customer service, OC goals, successes, etc.

Increase trend -issue news releases and feature stories on the website.

Link new OC magazine online to give overview of OC successes, opportunities, governance, research, teaching and learning, etc.

Produce an OC Alumni News Bulletin; an annual publication.

Produce "All You Want to Know About the OC" an online publication giving history of campus plus important facts and figures.

Produce an annual OC Viewbook - an online prospectus tailored to different level of our students.

Develop an online OC Sports and Awards News web page - staff publication to celebrate sporting excellence and other achievements

Develop an "OC Social Responsiveness and Research" webpage linked to the CSDR pages that showcase publications and research by our scholars and students that tackle regional challenges.

Continue to produce brochures, flyers and posters for OC Divisions/Departments

Target Audiences: (1) through (8). Timeline: Year 1. Assigned to: Marketing & Communications, Marketing Action Groups, Office of the Principal (Research) Registry, APAD, Library, CATS

Note: Important internal and external audiences include:

The Vice-Chancellor, UWI Deans & Directors, OC Directors & Heads, UWI Senate, OC Council, OC E-Tutors and Staff, Students, Student Guild, Student Media, Alumni Associations, UWI Development Foundation, UWI Student Organisations, UWI switchboards, Campus Security, Building and Grounds staff, Athletics,

Creative Approaches

- Effective overall Campaign Themes, e.g. *Experience Open Learning*, *Welcome to the OC*, etc.
- Lead with UWI an UWI Open Campus strengths as determined by market research
- Use well-written stories of Open Campus Graduates, Faculty, Staff who are making a difference to UWI and the region
- Demonstrate the direct economic and social effects of the UWI and the UWI Open Campus on the lives of West Indians
- Use both rational and emotional appeals in messaging: quality, loyalty, Caribbean, home-grown, committed, proven
- Choose themes that will resonate: quality of life, qualifications, future jobs, healthcare, education, technology, research, environment/sustainability, counseling, etc.
- Use real-life stories of Open Campus graduates, faculty and staff who are improving the quality of life for people in the region in the areas of health care, education, research, technology, the environment, and job creation – subjects near and dear to our target markets hearts and minds.

Evaluation

- Online and other surveys have to be conducted regularly to determine state of campaign awareness and current perceptions about the UWI Open Campus against benchmark data.
- The post-campaign market research will determine if the marketing programme has met its goals and/or exceeded expectations, i.e:
 - higher awareness and better appeal from new ads and messages
 - regional perception of the Open Campus be measurably increased
 - research assist in consolidating and positively affecting a number of other outcomes, i.e. increases in government funding, first-time donors, alumni registration, media coverage, student enrollment, etc.

IMC Campaign Success Indicators (in the second year after implementation of campaigns):

- Increase in regional and national media and peer institution attention
- 55% growth in student fees – across the board
- 15% growth over previous year of first time donors
- Government funding increase (over 2 years to 20%)
- 50% increase in active alumni

UWI Open Campus Integrated Marketing & Communications (IMC) Plan 2012-2014

Results

- Through solid market research and testing and as a component of a complete institutional integrated marketing and brand-building process, the UWI Open Campus will now generate a consistent sub-brand image within the UWI Brand in its positioning as the virtual and outreach arm of the UWI in its , “look”, tone, feel, and main messaging methodology.
- There will be a consistent ‘championing’ of the adoption of the sub-brand elements and the development of blended marketing strategies for the UWI and the UWI Open Campus.
- A new momentum will be developed to make this easier for Open Campus people to do (i.e. templates, graphic standards, etc.)
- There will be wider understanding and adoption of UWI branding and Open Campus sub-branding elements in various marketing and communication efforts, such as fundraising.
- This new integrated strategy will continue to form the foundation for the development, integration and implementation of all communication initiatives and strategic marketing programmes for the Open Campus:
 - Student Recruitment & Retention
 - Adult Learning & Professional Development
 - Research, Outreach & Partnership Relations
 - Staff Development & Financial Viability

Marketing Budget - Costs, Benefits, Value

Given the demand for marketing the products and services of the UWI Open Campus over the next two years in order to increase our revenue flows from increased recruitment and retention of students and alumni, the central marketing department of the Campus should be equipped with the budget, tools and talents needed to meet the needs of our current and potential clients. All our Division are pressuring this Department to meet their needs as they all work toward meeting their unit-level goals, in addition to the institutional goals. Most for-profit universities spend 20% and over of their revenues on marketing activities
(see <http://www.insidehighered.com/news/2012/09/07/british-universities-turn-marketing>)

The 2008 -2010 budget was originally forecasted to need financial support of BDS\$2 million to fully implement the operational plan. However, that figure was substantially reduced to approximately BDS\$500,000 because of decreased revenue flows from potential students and the Governments of the region. It is being suggested now, that in order to meet sated needs, that the overall marketing budget of the UWI Open Campus be consolidated and a comprehensive a detailed financial plan worked out for the Campsu over the next two years in order to take advantage of economies of scale.

It is also being suggested that the Marketing and Communications department be assigned 10% of the projected revenue from the tuition from 5000 undergraduate and graduate students, paying an average of BDS\$18,000.00 each to complete their programmes over the next two to three years in order to bolster the budget. There are also plans originating from the Department's own internal operational plan to find other revenue sources the sales of advertisements in the proposed magazine, as well as through online merchandise sales of memorabilia from an online store.

Costs

- Financial
- Time
- Hassle
- Opportunity
- Physical
- Psychological
- Social

Benefits = Solution to a problem

Value = **Benefits minus Costs**

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2012-2014 Budget Requirements

OCMAC Personnel (required)

- Graphic Designer
- Webmaster
- Web Developer/Analyst
- Copy Editor
- Market Research Officer
- Marketing and Communications Officer
- Marketing and Communications Assistant (Social Media)

Integrated Marketing Communication Campaigns

Branding/Image Development/Analysis

Advertising - Print, Electronic, Outdoor

Digital/Search Engine Marketing

Website Development

Content Management

Mobile and Tablet Applications

Social Media Management

Direct Marketing

Merchandise Acquisition & Sales

Print and Electronic Publications

Media Relations

Public Relations

Regional Events/Joint Promotions

Special Promotions (joint sponsorship)

Communications & Marketing Research/Audits

internal Communications Management

Communications Training

Hospitality Services

General Operating Expenses

Design & Production Services

Courier/Postage, Telephone, Fax, Computers

Local & Regional Marketing Travel & Per Diems – Staff/‘Star’Students

Market Research, Market Intelligence, Database Maintenance

APPENDIX 1

Current OC Regional Marketing Team

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APPENDIX 2

OC Demographic Data (from 2010 OC Market Survey)

THE REGIONAL MARKET

<i>Table 1. Variable Description</i>	<i>Total (N¹=1144)</i>	<i>Distribution (%)</i>
Gender		
Male	224	20
Female	897	80
Age		
18-31 years	518	46
32-44 years	462	41
45 and older	153	13
Student Category		
Online	653	58
Blended	256	22
Face to face	222	20
Registration Status		
Part-time	62	6
Full-time	367	33
Distance Education (incl. online)	681	61
Open Campus Sites		
Anguilla	14	1
Barbados	46	4
Cayman	9	1
Jamaica	336	29
St Lucia	75	7
Turks & Caicos Islands	2	0.2
Antigua & Barduda	39	3

¹ N is the total number of students who participated in the survey and the total number who responded to each question, as specified in each case in table 1.

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Belize	28	2
Dominica	62	5
Montserrat	13	1
St Vincent & the Grenadines	48	4
Bahamas	10	1
British Virgin Islands	6	0.5
Grenada	66	6
St Kitts & Nevis	27	2
Trinidad & Tobago	363	32

Employment Status

Full time	960	86
Seasonal/self employed	34	3.0
Part time	54	5
Unemployed	67	6

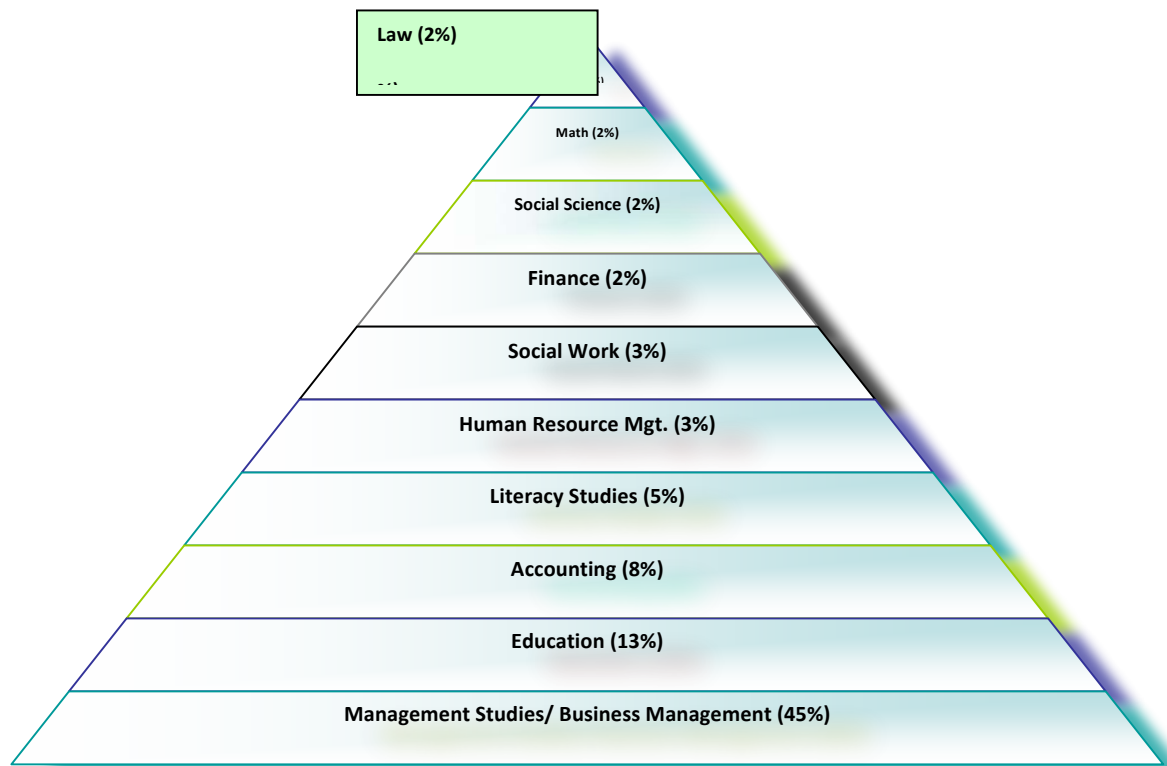
APPENDIX 3

STUDENTS' PRIMARY AREA OF ACADEMIC INTEREST (From 2009-2010 OC Market Survey)

The 1,000 plus students who participated in the survey listed at most 50 key areas which they captioned as their primary area of academic interest. The diagram below represents the top 10 areas that were reported by students. As indicated, interest in business/management studies as an academic area is reflective of the overwhelming majority (45%). Education which may including teaching accounted for 13% of the distribution which is the second largest proportion obtained. Accounting as an area of interest represented the choice of 8% of the survey sample. The remaining seven subject areas accounted for less

than 5% of the distribution in each case: literacy studies (5%), HRM (3%), Social Work (3%), finance (2%), social science (2%), math (2%) and law (incl. business law) – 2%.

The remaining 40 or so primary areas of academic interest listed by students include the following: IT/ Comp. Sc., Language Arts, Marketing, Economic/Statistics, Ad. Man., Agri-business, Behavioural Science, Communications, Counseling, Dancing, Engineering (incl. civil, building), Foreign Affairs/International Trade, Gender studies, Hospitality / Tourism Management, International Management, Labour and Employment Relations, Leadership, Media Studies , Medical Science, Meteorology, MIS, Motion Graphics, Music, Nursing, Paralegal Studies, Politics, Project management, Property Management, Psychology, Public Sector Management, Science, Sociology, Spanish, Supervisory Management , Teaching and Zoology.



APPENDIX 4

Educational and Career Trends

<http://www.forbes.com/sites/jamesmarshallcrotty/2011/11/21/5-big-trends-for-education-in-2012-13/>

<http://money.usnews.com/money/careers/jobs-in-2020>

http://www.cic.edu/News-and-Publications/Multimedia-Library/CICConferencePresentations/2012%20Presidents%20Institute/Concurrent%20Sessions/Making%20the%20Case_Lawlor%20Handout2.pdf

<http://theconversation.edu.au/tech-for-teaching-five-trends-changing-higher-education-7617>

<http://heglobal.international.gbtesting.net/media/7038/chronicledunnettintlprograms.pdf>

http://www.careerplanner.com/Career-Articles/Top_Jobs.cfm

APPENDIX 5

Management Checklist for Communications and Marketing

The CASE Management Checklist for Communications and Marketing was created in 2007 by the CASE Commission on Communications and Marketing and modeled after a development checklist created by the Commission on Philanthropy. It is intended to help managers conduct internal self-assessments of information and programs and is not intended for use by external regulators or auditors. The checklist may be useful to both new and experienced managers as they assess their programs and may also be helpful in staff training and orientation. The checklist is intended to be inclusive but not exhaustive, and not all items may apply to every institution. This is a living document that will be revisited regularly by the commission.

Institutional Background and Overview

- ☐ A brief history of your institution
- ☐ A list of members on your institution's board of trustees or principal governing body as well as lists of members of advisory boards
- ☐ Your institution's internal organizational chart, including a brief profile of your president or CEO
- ☐ Your institution's mission statement
- ☐ A current academic catalog
- ☐ A list of the top five schools your institution competes against for students as well as a list of the top aspirational schools
- ☐ The name of your institution's athletic conference and schools in the conference as well as a list of varsity sports
- ☐ The last five institutional or presidential annual reports
- ☐ Summary of current financials and costs (tuition, research investments, etc.)
- ☐ List of accrediting agencies and accreditation schedule
- ☐ Your institution's most recent published long-range or strategic plan
- ☐ Your institution's student, faculty, and staff handbooks, including disciplinary procedures

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- ☐ A complete set of relevant institutional policies (human resources, IT, etc.)
- ☐ List of major institutional affiliations
- ☐ Compilation of pride points
- ☐ For U.S. schools, the Common Data set and other relevant data that may be gathered by your institutional research office
- ☐ List of faculty by expertise

Constituency Demographics

- ☐ Demographic data on students, alumni, parents and other relevant constituencies, including total number and by gender, by decade, by geography, by income, by age, by level of preparation of applicants
- ☐ Top five concentrations geographically (students, alumni, donors)
- ☐ Top five undergraduate academic majors
- ☐ Top five graduate or professional programs in terms of enrollment
- ☐ Student outcomes, such as graduation rates, employment rates, graduate and professional school acceptance rates, scores on graduate and professional school qualifying exams, etc.

Communications and Marketing Overview

- ☐ Proof points for institutional distinction; campus “elevator speech”
- ☐ Key messages
- ☐ Famous and notable alumni
- ☐ Recent awards
- ☐ Market research from last five years
- ☐ Marketing strategies/brand plan

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- ☐ Experts and speakers bureau lists
- ☐ List of and background on recent issues at your institution, including commonly asked questions and answers
- ☐ Past press releases and recent media coverage
- ☐ Key Web pages and viewership
- ☐ List of rankings, surveys, and benchmarking data, including competitors' data
- ☐ Complete set of current publications for all audiences (marketing communications, fundraising programs) that call for action
- ☐ Office and institutional protocols for customer service

Policies and Procedures

- ☐ Your program has a strategic plan tied to your institution's mission and goals that incorporates the following plans within it: financial, human resources, academic, strategic enrollment management, marketing and communications.
- ☐ That plan is tied to budget and human resources
- ☐ That plan includes a collaborative process for working with academic leaders to conduct market analysis of current and potential programs and majors and acknowledges that there may be other factors such as institutional mission that contribute to decisions regarding academic programs.
- ☐ That plan includes procedures for coordinating communications across the institution regardless of centralized or decentralized structure.
- ☐ Your program has a crisis communications plan that is reviewed and rehearsed annually.
- ☐ It includes the identification of a spokesperson and a backup.
- ☐ It includes a list of key contacts and emergency contact information within the institution.
- ☐ It includes a list of media contacts.
- ☐ It includes a protocol for making emergency announcements (such as school closings), including strategies to manage communication when there is a catastrophic loss of infrastructure.

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- ☐ It articulates the relationship of the crisis communications plan to the institution's overall crisis management plan.
- ☐ It includes the definition of the roles and goals of the institution's crisis team.
- ☐ It includes a post-crisis review and assessment.
- ☐ Your program has a protocol for the management of media relations.
- ☐ It includes a process for the approval of press releases.
- ☐ It includes training or resources for faculty and staff who may interact with reporters.
- ☐ It includes a review of media relationships and preferred method of contact.
- ☐ Your program has graphic identity standards that apply to print and electronic communication.
- ☐ These standards include print and electronic templates, including Web templates.
- ☐ The institution has an office designated to oversee the use of the standards.
- ☐ These standards address licensed products.
- ☐ These standards include guidelines for internal, external and commercial use of institutional logos.
- ☐ These standards include a process for review and compliance across campus and with affiliated units.
- ☐ Your program has standards that apply to the content and organization of your Web site.
- ☐ Your program has adopted an editorial style guide and preferred dictionary.
- ☐ Your program has a process for review and approval of internal and external marketing materials.
- ☐ Your program abides by the CASE Statement of Ethics, the CASE Principles of Practice for Communications and Marketing Professionals and the CASE Principles of Practice for University and College Periodicals Editors.
- ☐ Your program also incorporates all of CASE's ethical standards, including those for development and alumni relations offices.

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- ☐ Your program incorporates institutional policies for release of information about students, employees and others associated with your institution in compliance with state and federal laws (for example, FOIA, FERPA, HIPPA).

Programme and Personnel

- ☐ You maintain a current organizational chart for communications and marketing.
- ☐ Your organizational chart was developed in consultation with institutional human relations.
- ☐ You have a process for communications and marketing professionals to communicate with each other across the institution through, for example, a communications council or Wiki.
- ☐ You have job descriptions for all exempt and non-exempt employees that comply with institutional guidelines.
- ☐ All communications and marketing programs have a written set of annual performance goals and objectives, including professional development goals.
- ☐ You have an orientation program for all new communications and marketing employees.
- ☐ Your orientation includes discussion of mission, key talking points, editorial style, branding, logo usage and other institutional goals.
- ☐ The orientation includes an introduction to the benefits and services of CASE.
- ☐ You conduct annual performance reviews.
- ☐ These reviews outline goals for the coming year, including new skill development and cross-training.
- ☐ These reviews convey the relevance of institutional goals to individual goals.
- ☐ The format follows institutional guidelines.
- ☐ The format includes reference to annual performance goals and objectives, their attainment or non-attainment.

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- ☐ You have a common understanding of when people report to work and when they depart.
- ☐ You have a common understanding about filing itineraries for business trips.
- ☐ You have a common understanding about filing contact reports and correspondence, including the matter of timeliness.
- ☐ You have a common understanding of appropriate attire.

Reference Material: *The URLs for the following Web sites:*

[CASE](#)

[National Association of Independent Schools](#)

[U.S. higher education associations](#)