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Best Practices for Aligning University Brands with Fundraising Campaigns

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Best practices for aligning university brands with fundraising campaigns

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Abstract

For a higher education institutional brand to most effectively position the institution and drive mission- and business-critical results, it must effectively convey distinctive institutional attributes to three important audiences: students, alumni and donors.

Institutions that are able to foster alignment of the brand and positioning among these three audiences are more likely to see investments in brand development result in improvements in market positioning and revenue generation. Two case studies demonstrate best practices. University of Toronto adopted its CAN \$2bn 'Boundless' campaign as its brand across academic and administrative units. Georgia State's US\$300m 'Burning Bright' campaign leverages its main brand attribute — student success.

Keywords

brand, marketing, higher education, nonprofit, fundraising, campaign

INTRODUCTION

Over the past decade, concepts of brand and marketing that are prevalent in the for-profit sector are growing in importance in the world of higher education. Colleges and universities worldwide face significant competitive and financial pressures: growing enrolment and retaining students; attracting and keeping high-quality faculty whose research drives institutional reputation and whose teaching conveys knowledge and institutional values to the next generation; managing tuition growth in a marketplace where list prices are increasingly beyond the reach of many families; and engaging alumni and supporters in order to grow fundraising revenue in support of the institutions' mission and vision. The proliferation of global and US national rankings of colleges, universities and graduate schools— from the global tables issued by Times Higher Education to the highly visible but much derided U.S. News and World Report rankings — has placed increasing pressure on institutions of higher education to develop a clear brand and positioning to their stakeholders and audiences.

In response, colleges and universities are elevating their institutional communications functions by enhancing their strategic marketing capabilities through market research, world-class creative development and implementation of brand marketing initiatives both horizontally across the institution and vertically among revenue-producing functions. The requirements of brand development activities are forcing increased collaboration among functional departments such as admissions (now often framed as enrolment management to focus resources on audiences of prospective students and parents and behaviours from application to acceptance, yield and retention) and fundraising (now often framed as institutional advancement to focus on audiences of alumni, donors and stakeholders and behaviours from engagement to giving).

Colleges and universities that develop institutional brands often focus their efforts primarily on admissions, since student tuition revenue drives the business model of most higher education institutions (unless they are fortunate enough to be among the select few who enjoy significant endowments). As institutions face demand constraints on increasing tuition from tapped-out parents and families, however, many turn to fundraising campaigns as a strategic initiative to diversify revenue sources, introduce greater revenue predictability and build a more sustainable economic model. These campaigns span multiple years and engage the institution in raising funds on a scale that can reach billions of dollars at leading global research institutions.

Higher education organisations are famously decentralised; however, responsibility and accountability for brand development land in diffuse places within the organisation: from communications in central administration (which historically has played a media and public relations role) to the leaders of the admissions and fundraising departments. In addition, the faculty — represented organisationally by the provost or chief academic officer — plays a critical role in its willingness (or otherwise) to support and participate in a brand development process.

Building a higher education brand that can position the institution distinctively, drive enrolment success, align with a fund- raising campaign and support all university objectives is the 'Holy Grail' among higher education marketers — it is often pursued but is rarely reached. Alignment of timing and resources between institutional brand development, annual enrolment plans and multi-year capital campaigns is complex as issues of responsibility, accountability and budget resources are laid bare by its requirements.

Grenzebach Glier +Associates (GG+A) have advised higher education institutions in capital campaigns and fundraising for over 50 years. The firm provides counsel and support services to more than 200 institutions, with fundraising and campaign goals ranging from \$5m to \$6bn and currently totaling nearly \$60bn in the aggregate. The current and past clients include 14 of the top 20 public fund-raising universities and 17 of the top 20 private fundraising universities, based on Council for Aid to Education data. This vantage point gives the firm an opportunity to identify and highlight institutions that have successfully aligned brand development and capital campaigns.

Two case studies demonstrate best practices. In Canada, the University of Toronto (U of T) adopted its \$2bn Boundless campaign as its brand across academic and administrative units. In the United States, the Georgia State University \$300m 'Burning Bright' campaign leverages its main brand attribute — student success. This paper will describe how senior marketing and communications leaders at these two universities, which occupy different market positions, have integrated brand and campaign communications for their institutions in order to drive success in fundraising and in all endeavors.

CONCEPTUAL FRAMEWORK FOR ALIGNMENT

For a higher education institutional brand to most effectively position the institution and drive mission- and business-critical results, the brand must effectively convey distinctive institutional attributes to three important audiences: students, alumni and donors. These audiences interact with the institutional brand through revenue-producing behaviors: enrolment (by students), engagement (by alumni — e.g. consuming and sharing university content; attending events; volunteering for the university) and campaign messaging and fundraising (by donors — e.g. understanding and sharing campaign messages; volunteering to raise funds for the university among classmates and peers).

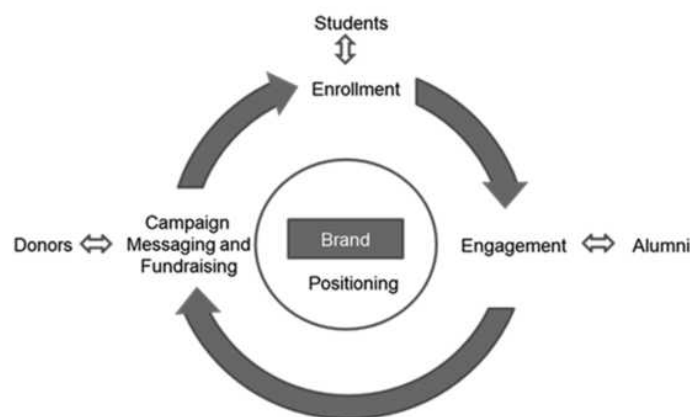


Figure 1 A conceptual model of university brand and campaign alignment

In our experience, institutions that are able to foster alignment of the brand and positioning among these three audiences are more likely to see investments in brand development result in improvements in market positioning and revenue generation. The two case studies demonstrate how leaders at U of T and Georgia State University have achieved this alignment.

CASE STUDY: THE UNIVERSITY OF TORONTO

U of T founded in 1827, is a leading global research university. The 2018 Times Higher Education world rankings place the university in the 22nd position, and U.S. News and World Report ranks U of T 20th among the top global universities. The university enrolls 88,766 students, offers 700 programmes of study and has 20,899 faculty and staff members and more than 570,000 alumni.¹

U of T capital campaign is led by Vice President of University Advancement David Palmer, and its marketing and communications efforts are led by Executive Director, Advancement Communications and Marketing, Tanya Kreinin. In 2011, U of T launched its campaign with a name that is a powerful clarion call: Boundless.

'The Boundless Campaign has become the most successful fundraising campaign in the history of Canadian Universities to date',² said David Palmer. U of T exceeded its originally planned \$2bn goal ahead of time and in December 2016 expanded the campaign goal to \$2.4bn.³ 'Boundless has served as the catalyst of the U of T brand marketing evolution', he said,⁴ and laid the successful foundation of the U of T brand at large.'

Yet U of T began this brand journey from a position that is common in higher education: fragmented communications and the lack of a compelling brand. Like many research universities, U of T is a large, decentralised institution.

'Back in 2011, there was deep skepticism about the value of the brand in general', said Tanya Kreinin.
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GG+A often see this characteristic of institutional culture to be prevalent among faculty and other stakeholders for whom business concepts like brand and marketing are newer operating principles in the lifetime of the institution.

So, as U of T leadership planned the fundraising campaign, we knew it would be important to not only conduct proper brand marketing work, thinking and implementation, but also ensure that at every step of the journey important stakeholders were fully aware and aligned on our approach and resist the urge to jump to tactics. (Kreinin)

University Advancement conducted an initial analysis, and the results were not encouraging. There was no clear, compelling and consistent storytelling that could effectively inspire and engage the audiences in support of shared goals and aspirations.

'There was no cohesive brand. Instead, there were many inefficient attempts to create separate brands and identities within U of T', said Kreinin.' These fragmented efforts hindered the institution's ability to effectively drive engagement and emotional affinity.'

Through market research, the University Advancement team quickly realised that in order to be successful with their fund- raising campaign, they had to capture the hearts of their audiences, but in order to do so they first and foremost needed to reveal the heart of the U of T at large.

'In short', said Kreinin,'we had to dis- cover the essence of the U of T Brand.'

In addition, considering the decentralised nature of the institution and lack of brand marketing appreciation, the University Advancement team had to do this very carefully, in a collaborative and inclusive way. So they established a central working group and also formed a university-wide advisory group. Both groups were established with the objective of creating a culture of

collaboration and thoughtful engagement throughout the entire campaign brand development process.

They also hired a marketing researcher and together developed their research methodology (Figure 2). This included a series of interviews, consultations and focus groups with U of T's internal and external community members with the objective of understanding their perceptions of the U of T brand and identifying challenges, opportunities and useful insights. A full report was developed that informed the approach to strategic planning and creative development.

The internal audiences delivered good news at the outset, as the research process revealed immense positive energy and enthusiasm among faculty, students and staff. The data showed that the internal community believed in the university's limitless potential to address the most pressing issues of our time. They saw strength in U of T's diversity of

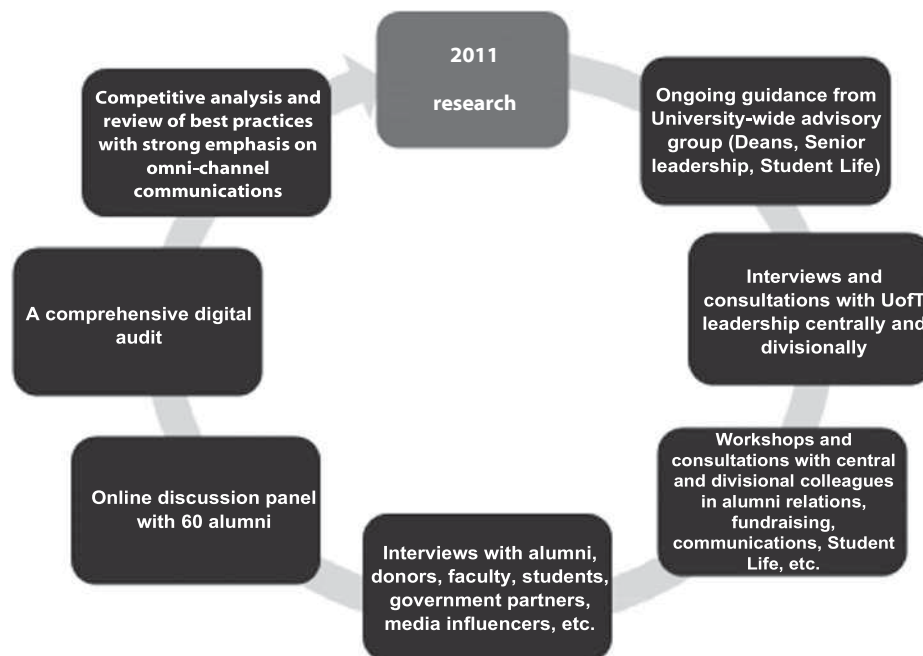


Figure 2 University of Toronto market research methodology
(Image courtesy of University of Toronto)

thinking, its incredible breadth and depth of academic excellence, its accessibility and its unique approaches to interdisciplinary collaboration.

The internal community also voiced concerns, however. They noted that in order to realise its aspirations as a university, U of T would have to look like, sound like and act like one university. But the university has three campuses, seven colleges and multiple faculties, each of which has a distinct culture and identity. Internal communities expressed a substantial fear of being lost in a larger university brand. They seemed to be open to a solution, as long as that solution would enable them to enhance their marketing and communications capacity without undermining what they saw as their uniqueness.

While the internal enthusiasm was encouraging, findings among external audiences were markedly less optimistic.

The University Advancement team discovered a significant challenge: the university's values were not always clear to external audiences. While they respected the university, they did not fully realise U of T's limitless potential to address the issues they cared about most.

This was a brand affinity issue that had to be addressed in order not only to effectively fundraise but also to engage alumni, prospective students, future faculty and staff for purposes beyond fundraising.

So, in close collaboration with the advisory group and the working committee, the University Advancement team undertook a strategic planning process to tackle this challenge. Through solution-focused collaborative sessions, a strategic territory workshop, creative development and the final testing of ideas with alumni, donors and students, they created a galvanising brand platform for U of T.

'Boundless is about the University of Toronto community's irrepressible drive to cross boundaries and challenge convention, its breadth and depth of expertise, its academic excellence, diversity and global reach, and its limitless potential to prepare the next generation of thinkers to defy the status quo. What's great about Boundless— it is not focused on U of T as an entity on its own, instead it captures and celebrates the essence of entire University of Toronto community, so everyone can see themselves in it'.⁵

'That's how Boundless was born', said Kreinin. 'Boundless is an aspirational idea that captures what we as a community can achieve together based on the goals, ambitions, passions and values we share.'

'At its core', said Kreinin, 'Boundless is about the University of Toronto community's irrepressible drive to cross boundaries and challenge convention, its breadth and depth of expertise, its academic excellence, diversity and global reach, and its limitless potential to prepare the next generation of thinkers to defy the status quo. What's great about Boundless— it is not focused on U of T as an entity on its own, instead it captures and celebrates the essence of entire University of Toronto community, so everyone can see themselves in it.'

To use a marketing methodology to capture Boundless, Kreinin and team developed a brand pyramid to guide communications planning, messaging and creative briefs. The brand pyramid clearly emphasises the importance of 'togetherness' — the idea that together we are Boundless, together we are making this university Boundless (Figure 3).

With the main strategic messaging in place, the University Advancement team turned to developing the Boundless creative expression (Figure 4).

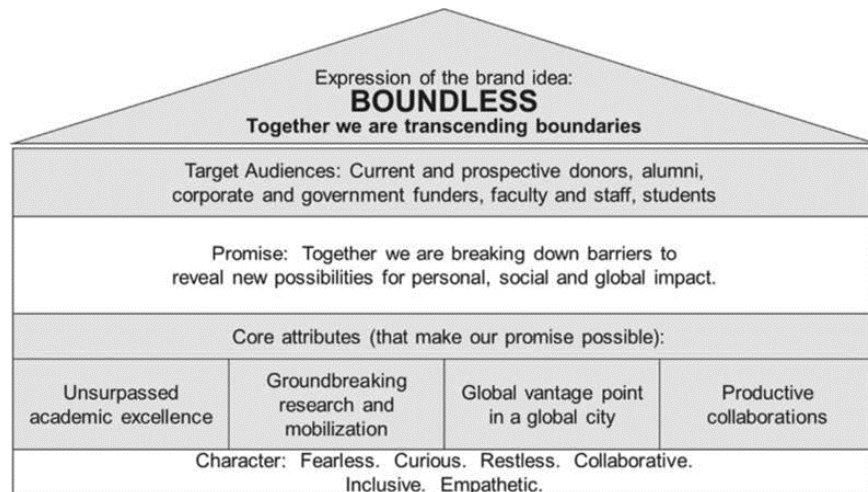


Figure 3 Boundless brand pyramid
(Image courtesy University of Toronto)

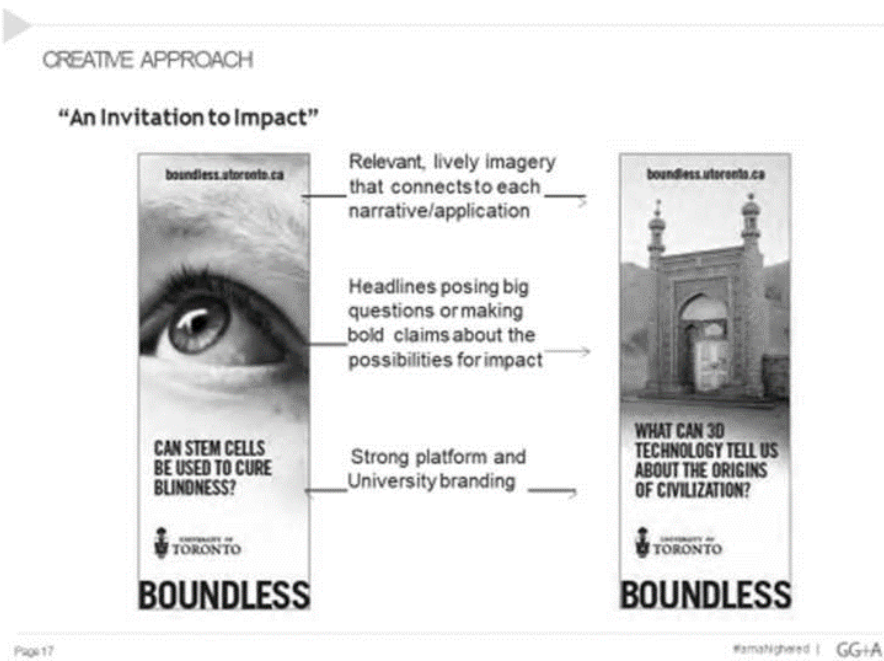


Figure 4 Boundless creative executions (continued)
(Courtesy University of Toronto)

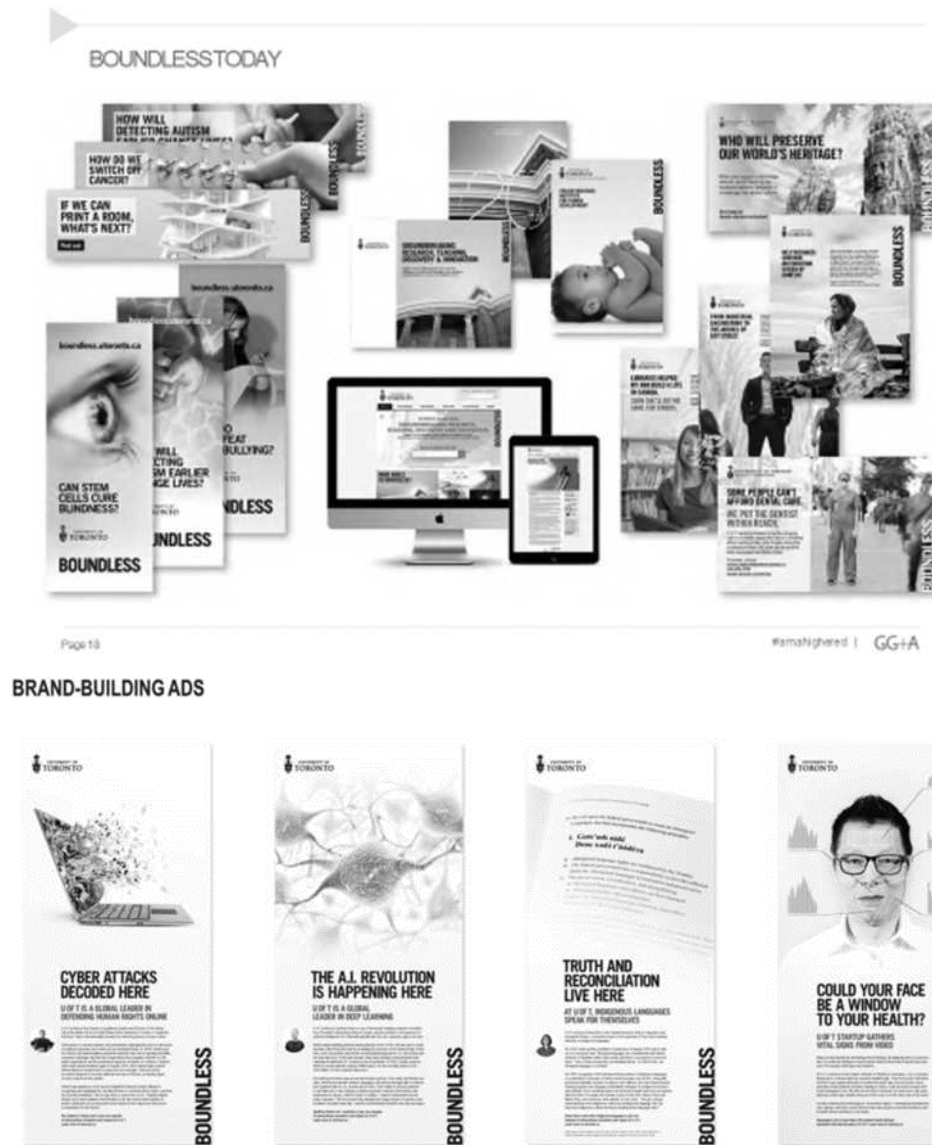


Figure 4 (continued)

Krein in said:

The creative approach is rooted in the brand idea and is focused on featuring unique stories that demonstrate boundary-crossing nature of U of T's impact on issues that matter the most. Headlines are posing big questions or making bold claims about the possibilities of impact, inciting curiosity and desire to learn more. Bold imagery connects to each narrative, depicting the essence of impact in the most vivid and compelling way.

With a brand in place, U of T was able to turn next to addressing alignment across the entire university. Since 2011, the Boundless campaign has been effectively adopted by U of T centrally and division- ally for campaign and alumni engagement purposes. In addition, it has been lever- aged by multiple divisions and faculties as an expression of the U of T brand, as part of their own initiatives — including mass media brand-building campaigns, student recruitment campaigns, student life initiatives, research initiatives and divisional marketing (Figure 5).

The use of the Boundless brand for student recruitment purposes significantly improved the perception of U of T among prospective students. Alumni engagement research over the past few years has demonstrated that boundless intensified the sense of pride and belonging and reinforced the perceived value of the U of T degree.

‘What’s unique about Boundless is its ability to rally multiple audiences around a common perception of the University’s goals, impact, and aspirations’, said David Palmer:

It puts the immense power of the U of T community, students, faculty, alumni, and donors, at the center of a narrative built on our individual and collective potential for global impact and leadership. Its expression enables deep personal resonance among constituents whose values are rooted in making the world a better place for this and subsequent generations. The University Advancement team encouraged the adoption of Boundless through enablement, collaboration and consultation. They conducted strategic and creative workshops and developed a brand book and online portal, which includes both strategic and tactical information about the brand platform. The online brand portal also includes a Toolkit section with numerous

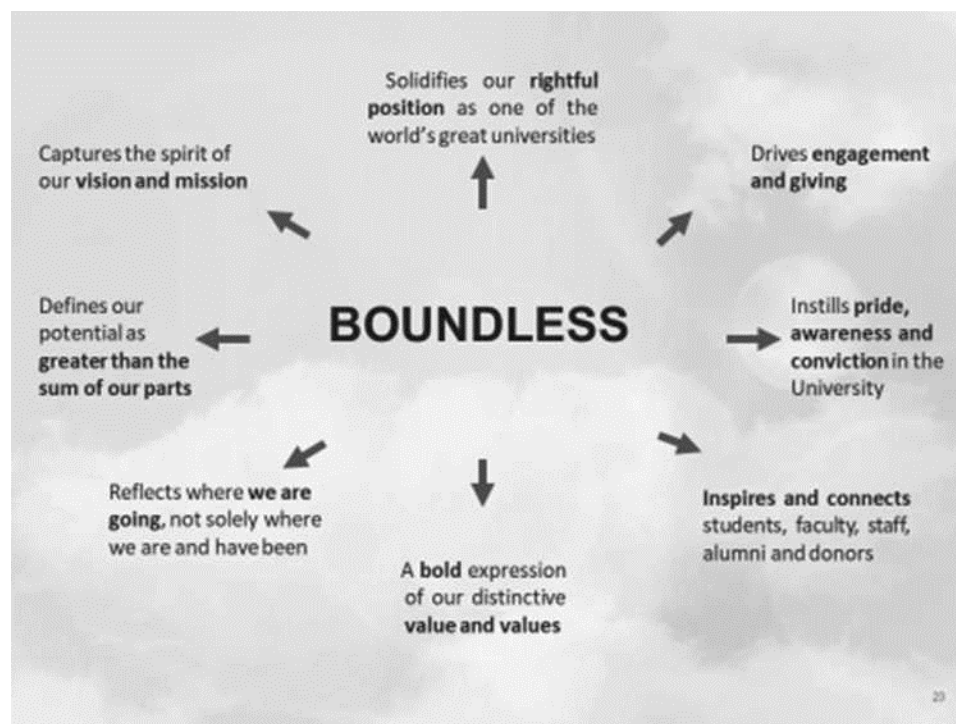


Figure 5 How Boundless works (Courtesy University of Toronto)

templates, collateral materials, guidelines and project-by-project content to ensure ease of adoption. The toolkit is updated on an ongoing basis based on the needs and feedback of the university stakeholders.

‘Boundless fueled a transformative mental shift’, said Kreinin.

Ultimately, Boundless was endorsed by the university leadership as an expression of the U of T brand. Inspired by the success of the campaign brand-building efforts to date, the university is in the process of building the university-wide brand hub, using Boundless as its foundation.

CASE STUDY: GEORGIA STATE UNIVERSITY

Georgia State is a university on the move. Under the leadership of President Mark Becker, Georgia State is frequently recognised as one of the most innovative universities in the United States. Located on 7 campuses throughout Atlanta, Georgia, the university has 10 colleges and schools and educates more than 51,000 students each year — including over 3,000 international students — from every state in the United States and 170 countries. It offers more than 250 degree programmes in 100 fields of study and more than 30 associate degree pathways at 5 campuses and through the largest online programme in the state. The university is a centrepiece of downtown Atlanta and has a \$2.5bn annual economic impact on metropolitan Atlanta.⁶ The Georgia State brand story presents an example of using its positioning as an institution that fosters student success, and its subsequent national reputation for innovation and successful enrolment and retention of students of diverse backgrounds, to gain donor support for a capital campaign and thus provide resources to advance the institution as a research university.

The Georgia State 'Burning Bright' capital campaign, launched in 2015, is led by Vice President for Alumni Affairs and Development and President of the Georgia State Foundation Walter Massey. Its marketing and communications efforts are led by Director of Communications for Development and Alumni Affairs Andrew Schmidt.

'In the Burning Bright campaign our goal is to raise \$300 million; we have raised \$298 million and are breaking annual fundraising records along the way', said Walter Massey: ⁷

It is a testament to our focus on student success, our inspiring students, brilliant faculty, and alumni and donors across generations of Georgia State who are proud of what we have achieved as a University. 'The success of Burning Bright is closely tied to the strategic approach to telling the Georgia State story', said Andrew Schmidt.⁸ 'Our focus on student success provides compelling data and rich emotional stories which resonate with our alumni, donors and stakeholders.'

This success is built on a solid marketing foundation, according to Schmidt, and an important part of the journey was starting with fundamentals.

Georgia State began its branding journey by focusing on its positioning statement. In early 2010, Georgia State began work on parallel projects—strategic planning and branding identity—to build a stronger university. Both of these projects drew on research gathered from 4,200 participants in 9 important university constituency groups.⁹

The research began with a review of existing data and communications, competitor strategies and internal perceptions of Georgia State's distinctive advantages. These findings were then supplemented by in-person interviews conducted with members of the university community and important external audiences.

These interviews probed audience perceptions about the attributes and personality traits that make Georgia State 'different and better than competitor institutions'. The identity findings were then used in quantitative research with the university's most important internal and external stakeholders.

This research was then analysed and synthesised by a group of communications and marketing experts across the university, led by Don Hale, vice president for public relations and marketing communications.

The university aligned around the following positioning statement:

'Georgia State University, an enterprising public research university in the heart of Atlanta, is a national leader in graduating students from diverse backgrounds. The university provides its world-class faculty and more than 50,000 students with unsurpassed connections to the opportunities available in one of the 21st century's great global cities'.¹⁰

This single statement was able to capture distinctiveness ('a national leader in graduating students from diverse back- grounds'), defining characteristics ('an enterprising public research university in the heart of Atlanta') and aspiration ('unsurpassed connections to the opportunities available in one of the 21st century's great global cities'). It served as the basis of a clear view of university identity when combined with six supporting messages and related supporting points¹¹ that emerged from the research:

1. GUIDING STUDENTS TO SUCCESS

- Although a university of 50,000 students, a focus on individual progress to graduation
- Distinctive advising, mentoring and innovative student learning solutions
- A national leader in monitoring progress to keep students on successful path

2. CONNECTING TO ATLANTA AND CITIES AROUND THE WORLD

- A university without boundaries, providing easy access to opportunities in a leading metropolitan area
- Valuable student experiences through internships, jobs and professional relationships
- An urban laboratory for faculty to explore solutions to city issues with global relevance

3. FOSTERING AND ENTERPRISING CULTURE

- A university culture reflecting students from all walks of life
- Many students who have overcome major obstacles to elevate their lives through education
- A culture based on ambition, hard work, dedication and perseverance

4. EMBRACING DISCOVERY AND CREATIVITY THAT IMPROVE OUR WORLD

- A centre of pioneering research and creative achievement
- Atlanta experiences that extend statewide and beyond
- A lasting impact on quality of life and economy of Atlanta
- Urban synergies and partnerships unavailable at most other research universities

5. EXTENDING CONNECTIONS ACROSS THE GLOBE

- Global opportunities for students and faculty through Atlanta, an important 21st-century city with the world's busiest airport

- A commitment to leveraging university's solutions-oriented urban research and creative collaborations with other global cities in emerging markets

6. LEADING THE COMMITMENT TO DIVERSITY

- One of the most diverse campuses in the United States
- A national leader in graduating students from diverse socio-economic, racial, ethnic and geographic back- grounds

Figure 6 is a visual depiction of the positioning statement, main messages and supporting points that Georgia State uses as a tool to foster consistency and integration of marketing messages.

This tool helps leaders and managers across the university understand the promise of Georgia State's identity, why it is important and what it means to them; live up to the university's promises in their daily activities; reinforce Georgia State's distinctiveness in every interaction and communication with important audiences; and make strategic operational decisions, ensuring that appropriate tactics and activities reinforce the university's distinctive position.

Guided by the 2011 strategic plan, Georgia State has generated national recognition and become a national model due to its extraordinary success in helping students from all backgrounds succeed and graduate in record numbers.

1. In 2015, U.S. News and World Report ranked the university No.5 in the nation for innovation and No. 14 for commitment to undergraduate teaching.
2. The Washington Post called Georgia State 'a perpetual laboratory for new ideas on using "big data" to improve higher education', noting the university's innovative efforts to keep students on track towards a degree.
3. In a speech at the White House, President Barack Obama praised Georgia State for helping more college students find pathways to graduation.¹²

IDENTITY

POSITIONING STATEMENT

Georgia State, an urban public research university and national model for student success, provides students and faculty with unsurpassed access to opportunities in Atlanta, the cultural and economic center of the Southeast.

OUR DISTINCTIVE STRENGTHS



Figure 6 Georgia State University brand identity
(Courtesy Georgia State University)

In the autumn of 2017, Bill Gates visited Georgia State University to gain a first-hand look at its innovative model for student success. In his 'gatesnotes' blog post entitled 'Putting Students First',¹³ he said:

I'm constantly on the lookout for colleges and universities that somehow defy these odds—places where students are more likely to graduate than not, regardless of race or income.

Georgia State University is one of the institutions that has achieved this goal.

I visited Georgia State University (GSU) earlier this year and was amazed by what I learned. An urban university serving low-income and minority students, GSU struggled with dismal graduation rates. Just over a decade ago, GSU's overall graduation rate was 32 per cent. Among Hispanic students, it was 22 per cent. Among African Americans, 29 per cent.

Today, the university's graduation rate tops 54 per cent, a 22-point improvement, among the highest increases in the nation during this period. What's more, there is no achievement gap at GSU. African-American, Hispanic, and low-income students all graduate at rates at or above those of the student body overall. GSU is one of the only public universities in the country to achieve this goal. And over the last four years, GSU has conferred more degrees to African Americans than any other college or university in the United States.

How did GSU do it? It did not take the easy route by shutting out at-risk students and cherry picking the brightest applicants. In fact, the university accepted more 'at-risk' students—low-income, minority, and academically struggling—than ever.

Instead, GSU worked to understand the challenges of college from a student's perspective. What obstacles prevent students from getting a degree? And how could GSU help students overcome them?

GSU's important insight was that there is not a single, big reason that leads to students dropping out. It is dozens of smaller things that disrupt their journey to graduation. For the GSU administration, digging into these challenges was a humbling experience. They realised that there were many things that they could be doing better to serve all their students.

So GSU redesigned the entire student experience from admissions to graduation, clearing a path for them to fulfill their goal of obtaining a degree.

Georgia State Vice Provost and Vice President of Enrolment Management Dr. Timothy Renik explained Georgia State's success in testimony to the United States Senate. He said:

'Georgia State . . . shows contrary to popular belief, students from all backgrounds can succeed at high rates and that dramatic gains can be made even amid the context of constrained resources'.¹⁴

'Now, imagine what could happen if resources were less constrained', said Foundation President Walter Massey. 'That is why we sought to leverage the University brand and position in a capital campaign.'

The campaign, launched publicly in 2015, seeks to raise \$300m. It has three overarching priorities: student success (to support and accelerate its proven track record of increasing graduation rates and positive educational outcomes), faculty excellence (to attract and retain excellent faculty via endowed chairs and research funding) and campus without boundaries (to continue the revitalisation of downtown Atlanta and build critical new facilities such as the new College of Law building).¹⁵

To connect the campaign to the Georgia State identity and brand, Schmidt led a campaign naming and creative effort that linked tightly to existing Georgia State visual identity and materials. The campaign name, 'Burning Bright', is intentionally connected to the visual symbol of the flame depicted in the GSU logo (Figure 7).

As the visual identity guidelines state, 'The graphic mark is an abstract representation of the letters G and S. But the function of this mark is not that it can be read as the school's initials, but that it is a strong visual symbol that is easily recognised, remembered and associated with GSU. Further symbolism may be read into the mark. There is a flame-like aspect that can be seen as symbolizing both the traditional flame of knowledge as well as the mythical phoenix, the symbol of the post-Civil War resurrection of the city of Atlanta'.¹⁶

After gaining internal consensus and support for the campaign name and visual identity, Schmidt and his team built a campaign website and a set of tools such as templates and positioning language to enable messaging consistency and integration on all campaign materials, tied tightly to the overall Georgia State brand.

The 'Burning Bright' campaign is achieving record results. The university has raised more than \$298m to date, and the \$50m it raised in its last fiscal year represented a record for Georgia State.

The university is on track to exceed its goal ahead of schedule. In addition, the campaign is posting stellar results for each of



Figure 7 Georgia State University campaign logo
(Courtesy Georgia State University)

its priorities. In student success, scholarship awards increased over 50 per cent. In faculty excellence, research funding has increased by 75 per cent as donors are contributing endowed chairs to build Georgia State research strength. In terms of building a campus without boundaries, donors are driving growth and development in Atlanta and across the state, including a new Law School building.¹⁷

'This campaign has been an exciting journey', said Schmidt:

It is clear to me that these results stem from our ability to tell a compelling university story, which in turn builds upon brand marketing fundamentals of a research-based approach to brand and positioning that has broad buy-in and is rooted in a strategic plan. Connecting these threads, all of the way through execution, has been key to our success.

CONCLUSION: ALIGNMENT ACHIEVED, LESSONS LEARNED

In both the U of T and GSU case studies, we see similar challenges and approaches towards solutions. Both institutions benefited from data-driven research, which involved internal constituencies to gain alignment and external audiences to provide essential customer insights. Both were led by strong teams, which fostered internal and external clarity on brand and positioning.

A collaborative and data-driven process was critical in both cases to gain alignment on brand expression and campaign goals and objectives. Conscious efforts were made to foster teamwork amid a decentralised operating environment. Both universities built tools and processes to inspire and enable ease of adoption of brand and messaging across the institutions, thereby connecting the campaign brands with the university brands through strategy and implementation. In fact, both chose to define strategy first and to resist the urge to rush to tactics. For the U of T, the Boundless campaign brand drove the foundation of the university brand. For GSU, the university brand of student success guided the creation and implementation of the campaign brand.

Visit our website at www.grenzebachglier.com. Contact us for information on implementing these strategies at your institution. Call 312-372-4040 or email the author at esevilla@grenzglier.com.

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