Integrated Marketing and Communications Plan

2016

TRINITY UNIVERSITY

University Marketing and Communications
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Executive Summary

The 2016 Trinity University Integrated Marketing and Communications Plan (IMC Plan) describes an evolved approach to the University's marketing and communication strategy based on the 2014 IMC Plan. Sucess was evident in many aspects, specifically enrollment and branding. However, there is still much work to be done as the marketplace evolves and the University's internal goals are established or realigned.

The 2016 IMC Plan is derived from a combination of learnings over the past two years, including stakeholder interviews, competitor analysis, market surveys, task force feedback, and consultations by third-party partners.

This plan serves as a guide for Trinity's Office of University Marketing and Communications (UMC) and the University as a whole as it seeks to build brand awareness, enhance alumni engagement and giving, and increase enrollment and academic profile.

In the 2016 IMC Plan, UMC will continue building on University successes while expanding the focus to areas including Alumni Relations and Development, Career Services, Office of the President, and internal marketing. These relationships are in addition to the existing partnership with the Office of Admissions.

This plan provides key objectives and strategies by which UMC and University offices can collaborate to build and implement tactics. The implementation of this plan will help build internal culture and pride by fostering engagement among all members of the Trinity community: alumni, donors, staff, faculty, students, and families of students.

PART I: Background

> *It is obvious that the first IMC plan was successful, and now is the time to look back critically and examine the plan—what worked, what can be improved. Trinity is ready to move forward.*
>
> *— Stamats*

OUTCOMES OF 2014 PLAN OBJECTIVES

Part of the strength of the new IMC Plan comes from the assessment of current progress on objectives identified in the 2014 plan, as well as recommended future considerations.

Strengthen market position and improve student recruitment.

In the 2014 IMC Plan, enrollment was a driver and shaped the structure and the assessment of performance. Thus, the priority to develop strategies to build brand awareness, create an admissions marketing communications plan, and implement a new "prospect name buying" strategy became the focus. Through these strategies and a successful partnership with the Office of Admissions and UMC, Trinity has seen a record number of applicants and an increased yield while also increasing our incoming student academic profile.

Be an innovative leader for excellence in teaching and research.

Trinity made progress on this long-term objective through publications such as Impact magazine, highlighting active scholarship and research at the University; the redevelopment of recruiting materials; the redesign and theming of Trinity magazine; and the creation of engaging web content. While the 2014 plan created the foundation, the next iteration will further extend brand attributes and enhance the editorial and visual components of storytelling that support the foundational objective.

Improve alumni relations, engagement, and fundraising.

The 2014 plan did not prioritize this particular objective. However, it is becoming increasingly important, especially as Trinity prepares for the early stage of a capital campaign. Through integrated marketing and brand awareness initiatives, conventional and digital promotion of the University, and the research garnered from alumni surveys, UMC made progress to help alumni and friends of the University better appreciate Trinity's current market position. Moving forward, the 2016 plan will shift to this objective as one of the main priorities.

Build the infrastructure to support the needs of the 21st century University.

The previous IMC Plan instilled a mindset of collaboration and cooperation among University constituents. The evolution of the UMC team provided support for new technologies and best practices, including advanced web, marketing, analytics, and creative services. In this new plan, the UMC team will continue to evolve, anticipating changes to technology standards and implementing integrated strategies to maintain a consistent brand.

IMPLEMENTATION AND ACCOMPLISHMENTS

Over the past two years, UMC executed on the 2014 IMC Plan that implemented and accomplished the following:

- Realigned and reimagined the function of marketing within the institution
- Assessed, through research, Trinity's position in the higher education market
- Established baseline for brand definition
- Brought athletics marketing into the UMC operation
- Fine-tuned and refocused messaging, from admissions to alumni relations to athletics
- Developed and followed consistent visual guidelines
- Redesigned and managed the University web site, and established a set of web content guidelines
- Developed an integrated content strategy for all print and digital materials
- Introduced a new president to the University community
- Met and exceeded institutional enrollment goals

PART II: Trinity Today

VISION

Trinity will redefine liberal arts education for the 21st century. By embracing innovation, Trinity will become a national leader by preparing students to thrive in an interconnected world, strengthening interdisciplinary and experiential education, and integrating academic and residential campus life.

VALUES

Discovery, Excellence, Impact, The Individual, Community

Discovery

The discovery of new knowledge and the reinterpretation of previously discovered knowledge develop an understanding of the world beyond the borders of campus. Striving to understand the world and ourselves, we never stop learning. Building on what's already known, the Trinity community works together to create new knowledge. Trinity helps students discover their passions and chart their course. We work with each other in continually uncovering new ways to think, to create, to teach, to learn, and to grow.

Excellence

Trinity is a place that sets the highest standards and continually reinforces them. The environment inspires the best from students, faculty, and staff and Trinity does not settle for less. Whatever the university sets out to do, it always acts with complete integrity. From curriculum, to research, to creative output, to Trinity's impact on the world, it consistently strives to achieve the highest standards of liberal arts education.

Impact

Trinity works to develop a transformative experience for its students, enabling time spent at Trinity to be especially influential in their lives. As a university, we shape what's next—from the surrounding community to the rest of the world. Trinity empowers a new community of thinkers, creators, and doers—preparing our students to make a tangible, positive difference wherever they go.

The Individual

At Trinity, each and every person matters—every student, every alumnus, every staff and faculty member. Every individual is treated with thoughtful care and compassion. Trinity respects and nurtures each person's unique talents, spiritual growth, skills, passions and potential. The university fosters an environment open to individual spiritual discovery, understanding, and growth. Whatever we set out to do, we always act with the highest level of integrity by cultivating individual strengths, with the result that the whole is much stronger.

Community

At Trinity, the sense of community permeates students from the moment they step on campus, to long after they have left. Trinity is connected to other relevant communities worldwide, sustaining groups of people who will engage, attract, serve, inspire, and influence.

Based on the University vision and values, feedback, and observations from the Trinity community, UMC developed a brand voice and identity focused around four pillars. The tagline "Discover. Grow. Become." is intended to capture the essence of the Trinity experience.

Discover. Grow. Become.

The Trinity experience establishes a lifelong journey of discovery and growth that inspires and empowers students to become successful.

We provide experiential learning opportunities, challenging viewpoints and a progressive curriculum for continuous discovery — with diversity and a healthy campus culture to encourage our students to grow.

Large School Resources, Small School Environment	**Prepared to Lead**	**Engaged with the World**	**A Challenging & Supportive Academic Environment**
At Trinity you'll find boundless resources available to a close-knit community of students and faculty. We're small where it counts and large where it counts. We're a big, small school.	Trinity students are prepared to be effective and influential leaders across all academic and professional disciplines.	Trinity provides experiences that encourage all students to look beyond borders and engage with an interconnected and ever-changing world.	Trinity attracts students that seek an academic challenge, but not at the expense of their peers. It's challenging, but not competitive. We want them to explore and we give them opportunities to do so.

INTERNAL VOICE: We are not shy about expressing what we value and what we believe in. We are helpful, supportive, and welcoming. We are a tight community, intellectually curious, and drawn to other views outside our own. We are not for everybody, but that's okay. We are proud. We are Trinity.

> *The only sustainable competitive advantage is an organization's ability to learn faster than the competition.*
>
> *— Peter M. Senge, MIT*

COMPETITION

Trinity's brand potential in 2016 will be realized by examining its market position. Trinity reviewed the below list of institutions with whom it competes for mindshare and marketshare.

- The University of Texas at Austin (UT Austin)
- Texas A&M University (Texas A&M)
- Texas Christian University (TCU)
- Southern Methodist University (SMU)
- Baylor University (BU)
- Southwestern University (SU)
- Rice University (RU)
- The University of Texas at San Antonio (UTSA)

The University of Texas at Austin

UT Austin has an extensive university communications operation with more than 40 professionals involved. Upon review of the mission of the department, it is clear their purpose is to "tell the story about the public research university of the future." This staff of 40 does not include resources for Division I athletics marketing.

UT Austin is a disciplined institution for executing its brand. Most messages relate to UT's tagline and personality. Prospective students are quickly and easily transitioned from talking about the university to conveying how students are prepared to lead and change the world. UT Austin addresses practical matters of affordability with high earnings of graduates, student life, and location advantages.

Interestingly, UT Austin never truly defines the size of the university, other than saying there is a large student body. The messaging also neglects to describe the types of students who are the best fit for the university.

In terms of execution, UT Austin excels at brand consistency—using its unifying tagline, and for promoting headlines that are supported and reinforced by storytelling. Written stories, video testimony, social media links, and photography reinforce the tagline.

For Trinity to compete against this competitor, the University should further explore messages about a personal educational experience with mentoring faculty, discovery and maximizing student potential, the difference students make a difference (even if not changing the world) and succeed upon graduation. Trinity can better define and showcase the types of students who thrive at Trinity.

Texas A&M University

Texas A&M has a Division of Marketing and Communication with a vice president, a 12 person marketing team, seven person communications/media relations team, and five more team members in external relations and business development. At 25 professionals and support staff, this is considered a large organization particularly because this does not include the staff dedicated to the Division I athletics programs.

The Marketing and Communication division provides a brand guide, does not define themes or messages for the institution, which presents a weakness. University news stories appear random and there is a mosaic of messages for prospective students. However, there is a strong reliance on tradition and the outcomes of alumni. For Texas A&M, brand is about tradition and the logo, which carry the weight of the brand. Sports, the Aggieland mentality, Aggiebound, Aggie-anything, and having more than 400,000 alumni help this institution with visibility and brand awareness. Texas A&M relies on the Aggie community to define the institution based on personal experience. Trinity does not have that luxury of a large alumni base.

Texas A&M uses multiple communication channels to connect with prospective students in particular. Although these channels tell stories, they are often unfocused and do not reinforce a key unifying messages. Trinity should not follow Texas A&M's "promote a little bit of everything" example, and instead focus on using storytelling to bring key messages to life as did UT Austin.

Texas Christian University

TCU has an Office of Marketing and Communication. A vice president oversees a marketing staff that includes a Director of Admissions Marketing and Communication, two members of the advancement staff, three members of a community projects staff, two conference services staff, three editors/writers, five graphic designers, five strategic communication management staff, and five web and social media staff members. That is a 26 total staff members, and does not include resources allocated for the Division I athletic programs.

Some of TCU's messages are similar to Trinity's messages, however, Trinity has an opportunity to gain a marketing advantage by making recruiting messages very personal throughout all marketing touch points, using both quick facts and storytelling to engage student interest, and ensuring the website user-experience is positive.

For audiences such as parents and alumni, Trinity should clearly define a set of core messages and execute them consistently. For media relations, know the position you want to own, align stories and experts to support that story, and have a plan in place for action. These points are a weakness for TCU.

One of the more effective marketing strategies from TCU was the customized communication to accepted students and featuring comments from enrolling students on the social media section of the prospective student pages. Both are good ideas, but two good ideas alone do not overcome the other weaknesses found for TCU. Consistency in messages and execution will help Trinity to stand out versus TCU.

Southern Methodist University

The Development and External Affairs division includes an Office of Integrated Marketing and Advertising with a professional staff of 18 along with an external agency partner for design.

In terms of execution, Trinity also needs to excel at translating features into benefit. SMU does well in this area and emphasizes the SMU network along with this idea of "prestige." Trinity needs to use real examples of what students are doing to show how they are benefiting from the alumni network, student research opportunities, and community engagement to stand out versus SMU. Among the messages, SMU sells the city of Dallas and the career opportunities students and alumni find. Trinity can strive to compete with the growing national attention on San Antonio and the SA2020 initiative.

Baylor University

This office has more than 40 professional and support staff working on all aspects of marketing and communication. This does not include athletics marketing, which is separate for Baylor's Division I programs. Baylor's is unique in its intentional focus on Christian messaging, which attracts a slightly different type of student to the university. Students who are looking to discover their faith-based calling in life would appear to be a good fit for Baylor University.

Particularly to compete with Baylor, Trinity needs to have a strong social media presence and project a message of an elite network, prestigious academics, and "fun" student life experience. Baylor videos bring the institution to life for prospective students far better than any of the written information. If Trinity has both effective writing and powerful videos, it would gain an advantage in terms of content.

Southwestern University

SWU has an Office of Marketing and Communications that only lists three professionals including the Chief Marketing Officer, a Director of Communications, and an Executive Assistant. Marketing is comprised of creative services, media relations, and social media and web development team members, many of whom are housed in offices outside of the Office of Marketing and Communications—thus a decentralized structure. Of the competitors analyzed, Southwestern has the least amount of resources and is the only one with a decentralized approach. SWU is also a step behind all competitors for branding.

The primary lesson to be learned from analyzing SWU and its brand is understanding what to avoid. Other than positioning SWU as a the top ranked national liberal arts college in Texas, there is no unifying message or well-defined set of core messages that are consistently promoted, explored, and supported on their website or in marketing materials. Campaigns are unsophisticated and there is little evidence that the marketing messages can be solidly proven or supported with examples.

Rice University

Rice has an Office of Public Affairs and Brand, which is responsible for integrated marketing communications for the university. Staff members' work includes creative services, marketing, government relations, multicultural community relations, news and media relations, university relations, web development, and branding. There are 34 professional and support staff for the office overall not including athletics, which is Division I and has a separate staff.

Rice demonstrates the power of using an emotionally engaging and unifying theme to define brand and to project the strengths of the university. The theme of "Challenging Convention" is used to engage both internal and external audiences. Rice does a more complete job of executing the unconventional wisdom/challenging convention theme with advertising campaigns and execution for prospective students and alumni. Rice heavily uses video to express the brand and to promote university strengths.

The University of Texas at San Antonio

UTSA has an Office of University Communication and Marketing, and Brand, which has a staff of 26. The services of this office cover communication, media relations, publications, marketing, web services, design services, and photo/video content. Athletics is separate from the marketing office with this Division I program. UTSA promotes the idea of "building pride and tradition." The university made a commitment

to being actively involved in community outreach, which continuously enhances brand visibility and demonstrates a strong partnership with the city of San Antonio.

Though not a direct competitor academically, Trinity should be aware of this emerging university in the future. UTSA has a large alumni base for building brand awareness and the city of San Antonio embraces UTSA through as evident by the commitment to being a community partner.

CONQUERING 2016 AND BEYOND

As the 2014 plan reached a tipping point that led to the creation of the 2016 plan, the implementation of strategies continued, including tasks that have been met or are in progress:

- Set up an ***internal education*** process to establish marketing as a way of thinking throughout the University and to promote brand ambassadorship.

- Develop ***strategy***, clarify vision, set clear goals and objectives, identify target audiences, create messaging, identify and train critical and credible messengers, assign appropriate communication mechanisms, and monitor competition.

- Establish a ***strategic marketing task force*** as a University activity supported from the top.

- Perform an ***audit*** of marketing materials and strategies and prepare a plan emphasizing consistency of identity, message, and market segments.

- Establish ***on-going research and assessment*** based on key factors such as awareness, pricing and competitor strategy.

- In the ***implementation of the 2016 plan***, develop effective materials, form partnerships with stakeholders, train brand ambassadors and monitor and evaluate in an ongoing fashion.

The above action items will not be possible without University support and integration: the leadership is on board, resources are earmarked, communications have begun the journey to full integration, and internal community members have been involved at all levels.

CHALLENGES

Trinity University lacks wide brand awareness.

As Trinity conducted qualitative and quantitative research over the past four years, it became evident that Trinity suffers from a lack of brand awareness among prospective students and families in target markets, and that many current Trinity students lacked consciousness of the Trinity brand prior to researching colleges.

Trinity is facing increased competition while striving to maintain steady increases in enrollment.

Trinity is often not the first choice for the type of prospective student who would most appreciate the school's qualities. Among our most desirable candidates, the University is currently perceived as a backup school rather than as a first-choice or aspirational school.

Since the implementation of the 2014 IMC Plan, there is evidence of notable growth in the quality and quantity of the applicant pool. This is measured by key performance indicators including increased website visits, increased number of qualified applications, number of completed applications, increased number of highly qualified admitted students, increased number of deposits, and the adoption of "Tiger Pride." However, enrollment marketing is ongoing and must be constantly optimized in order to meet institutional enrollment goals.

Alumni engagement and giving has been declining in recent years.

As the University moves into the initial phases of a capital campaign, it is important to improve the foundation of alumni support and engagement. UMC plans to align as partners with the Office of the President and the Office of Alumni Relations and Development to enhance the University's relationship with alumni and donors. Growing brand awareness and being good stewards of the brand are strategies Trinity knows to be inseparable from the success of increasing alumni engagement and giving. Staffing will also be assessed to ensure the UMC team can adequately accomplish these objectives. There is also opportunity to cultivate Trinity's campus community to become brand ambassadors.

STRENGTHS

Trinity delivers a high-quality, relevant, and meaningful education to students.

Trinity combines a strong liberal arts and sciences education and exceptional professional and pre-professional programs, resulting in powerful career preparation for students. The higher education industry acknowledges the University's academic prestige as evident with rankings. The University continues to be enhanced by a vibrant campus culture and athletic programs, notable faculty and staff, and active student organizations.

Trinity has exceptional resources to support learning and foster student growth.

Among Trinity's abundant resources are three new centers: Center for Experiential Learning and Career Success; Center for International Engagement; and Center for Student Success. The Center for the Sciences and Innovation (CSI) building, completed in 2014, is another example of Trinity's investment in the future. CSI was designed and executed to intentionally provide infrastructure to support collaboration, empowerment, exploration, and invention.

Trinity has achieved external recognition for both quality and value.

Trinity continues to receive ongoing recognition from influential sources. Examples of this external recognition include:

- *U.S. News & World Report* #1 Regional Universities – West (24 years in a row)
- *Forbes* America's #8 Most Entrepreneurial College
- *U.S. News & World Report* #1 Strong Commitment to Undergraduate Teaching
- *Kiplinger's* Best Values in Private Colleges
- *The Princeton Review* Best 380 Colleges

Trinity's approach to education is consistent with generational values and desires of incoming students.

Trinity is aligned with the upcoming generation of college seekers. Specific ideas that resonate uniquely on the Trinity campus and with Generation Z are diversity; inclusiveness and authenticity; entrepreneurship and problem solving; multi-curricular and co-curricular interests; travel, and exploration. UMC and University initiatives must continue to complement generational needs and outlooks.

OPPORTUNITIES AND PRIORITIES

The items below are taken directly from the observations of Stamats during the 2016 audit process.

Enrollment/Admissions

From the last plan, it was obvious that developing a working relationship with the Office of Admissions was the priority. The crux of the last plan has much to do with marshaling the information needed to be effective partners with admissions. From all indicators, it appears that this effort was successful. Admissions will require as much or more work in the future. UMC is aware, perhaps more than any other office on campus, of how technology and strategy affect change. UMC also knows how fast that change can happen. What was done this year may not work next year, so developing and cultivating the relationship with admissions is going to be as important in the next plan as other tactical activities. Discerning responsibilities between the offices in this venture is critical. The ball can't be dropped, and UMC will have other responsibilities in this new plan, so figuring out a solution is important.

Advancement and Alumni

There are two major ways in which universities raise funds to support their operating budgets. UMC addressed one in the last plan, bringing new students to the University. The other is through enhancing the connection felt by alumni to the institution and how they demonstrate that enhanced connection through giving.

It became obvious in our visit that those in advancement and alumni note UMC's successes with admissions and are impressed. It is therefore critically important that a partnership be formed with advancement and alumni to ensure that Alumni Relations & Development feels like a part of the process and can become champions of marketing initiatives as the Office of Admissions has. Getting together with Alumni Relations & Development to work out goals and objectives and cement the working relationship is critical for UMC's continued success and that of the University. This will require UMC's personal attention.

Career Services

UMC should partner with the Office of Career Services to impact admissions, alumni and advancement. Unfortunately, based on the world's interest in quantifiable outcomes and a "from-the-past" view of the way the office functioned long ago, the campus community is apt to question the career services office's worth or value. There is a corresponding marketing and communication charge in working toward a positive resolution to address needs of key constituents, including alumni.

The Office of the President

With a high degree of confidence between the president and UMC, UMC has the opportunity to showcase Dr. Anderson in various facets in the coming months and years. This is important in planning, as UMC has the opportunity to showcase him in the coming months. The requirements of the president will only be greater as time passes and as his attention is turned to alumni engagement and fundraising. Keeping that line of communication open is important and might require that UMC looks at how media, public relations, and public affairs are staffed. Demands on public and media relations are going to increase, and UMC needs to be prepared to meet expectations.

Efficiencies – Refine, Repeat, and Repurpose

As demands for UMC's services shift and increase, it is important that UMC operates efficiently—namely, looking at how content can be tweaked and repurposed. How can communication vehicles that UMC controls be "content centralized"? Can UMC consolidate these vehicles so that they serve more than one purpose? This will take some creativity, but it is definitely possible. Providing easy templates for campus partners to use so that they can create their own brochures is one way many universities control message and visual identity; having a virtual print storefront on the web site is another alternative. This will allow UMC to limit hands-on work while still maintaining brand control.

Web

The website has come a long way in a few years. The number of pages has decreased dramatically, which emphasizes the importance of maintenance, ease of navigation, load time, and viability for all audiences. No other communication tool is as challenging or as important. Audiences include prospective students, prospective and current donors, alumni, students, faculty, staff and the greater community.

Creative

Keep creative exciting and emotional. Trinity has a significant human story to tell that is still not being told. Our view—there seem to be a lot in the samples given to us that are not up to the level of creativity of which we think the UMC office is capable. They meet the brand guidelines, but they don't emotionally grab the recipient. We are not sure why this is the case—it may be that there is too much work spread thinly across the UMC team, or that campus partners are not letting UMC be its creative best. Creative needs to be emotive of the factual material presented in the brand, and some of what we see is not that way. And when it comes to the web, looking outside higher education is critical to achieving this emotive quality.

Continuous Improvement

UMC will need to be sure that the marketing communications staff has an outlet to learn and to be involved with other institutions like Trinity. There are countless listservs and groups to become members of, but keeping the staff at the top of their game requires an investment in continued education and the ability to serve on boards and organizations. It also is important that the institution track and take advantage of high visibility boards and associations for senior staff and faculty. Networking is building reputation.

Staffing appropriateness

While UMC has done a solid job of building a contemporary, digital-oriented marketing and communications staff, it is now time to consider embellishing other aspects of the operation. UMC appears underserved in the areas of content creation (mainly in writing/storytelling), brand awareness development, and public affairs (PA) who work with the general public and important stakeholders such as the media, legislators, and those who invest in the institution. With the growing needs of the Office of the President, one or more people can be devoted simply to this role. All of these moving parts need to have strategic leadership to orchestrate consistent and compelling storytelling at every level—which is going to expand exponentially with the coming alumni/advancement work. As UMC moves forward with this plan, it is time to decide if staff should be added to the UMC team, to other offices on campus, or through partnership with off-campus agencies. Agency partnerships can reduce University overhead expenses in support of UMC and give some flexibility to the office in hiring staff on a temporary, as-needed basis or to fulfill the needs of certain projects.

PART III: Planning

> *In preparing for battle I have always found that plans are useless, but planning is indispensable.*
>
> *— Dwight D. Eisenhower*

INTRODUCTION

Trinity's marketing and communications efforts benefit from clear direction. The 2016-17 objectives and strategies lay the groundwork for immediate impact while broader objectives inform marketing and communications efforts for the long term.

TARGET AUDIENCES

The IMC Plan focuses on both internal and external audiences. Objectives and strategies are interwoven and success in one area affects the success of the University as a whole. Primary audiences include prospective students, families, adult influencers, community members, alumni, internal Trinity community, and donors. The IMC Plan seeks to reach these constituency groups on the local, regional, and national levels.

OBJECTIVES AND STRATEGIES

Academic Year 2016-17

UMC will continue to measure, refine, and assess progress of the objectives and strategies. The long term success of integrated marketing relies on continuous goal setting, vision, and implementation. This plan outlines multi-year objectives and strategies for implementation and measurement.

The plan utilizes key performance indicators and metrics to provide insight and measure achievements. It includes metrics related to diagnosing and maintaining the ongoing health of Trinity's many digital channels, as well as detailed recommendations for benchmarking and measuring goal attainment.

Objective #1 Understand and define priorities and opportunities

Strategies
1.1.   Conduct stakeholder interviews
1.2.   Perform competitive analysis
1.3.   Audit marketing materials and website
1.4.   Form IMC Plan task force

Objective #2 Establish marketing and communications as an institutional mentality University-wide

Strategies
2.1.   Build and strengthen partnerships with designated offices
2.2.   Evaluate and identify resources
2.3.   Define priority areas of focus, including enrollment, alumni, advancement, and career services

Objective #3 Develop measurements for success with priority offices within the University

Strategies
3.1.   Create key performance indicators and metrics with designated offices
3.2.   Implement technology and processes to support objectives
3.3.   Perform data integrity audit
3.4.   Evaluate third-party web partnerships, e.g., Touchnet, iModules, Symplicity

Objective #4 **Maintain strong enrollment and grow the "demand" for Trinity University**

Strategies

4.1.   Drive up the quantity of qualified first-year applicants
4.2.   Increase the percentage of applicants who complete their applications and engage deeply
          with the University
4.3.   Grow enrollment yield
4.4.   Continue to enhance academic profile of applicants
4.5.   Establish robust parent communication
4.6.   Evaluate graduate programs communication plan

Key Performance Indicators & Metrics:

- Number of scheduled visits on the website from campaign tactics
- Number of campus visit inquiries and visits
- Increase quality of applicants
- Meet admissions enrollment goal of 640, factoring in "summer melt"
- Strong waitlist to accommodate "summer melt"

Objective #5 **Increase net tuition revenue**

Strategies

5.1.   Engage in Objective 4 enrollment strategies with financially qualified families
5.2.   Enhance "Select Scholars" program
5.3.   Establish academically and financially qualified applicant waitlist

Objective #6 **Build brand awareness and elevate prestige**

Strategies

6.1.   Grow network of brand ambassadors
6.2.   Strengthen community relations in target markets in Texas, region, and nation
6.3.   Increase reputation and external recognition among employers
6.4.   Build the reputation of President Anderson within external community
6.5.   Evaluate the feasibility of a spirit shop

Key Performance Indicators & Metrics:
- Increase brand recognition in the marketplace (market research)
- Increase awareness evidenced by admitted student questionnaire (Year over Year [YoY] research)
- YoY increase in number of prestigious national rankings and awards
- YoY increase in number of quality organizations giving rankings and awards
- YoY increase in online and print content about Trinity published by external media
- Increase the diversity of targeted employers to attract more student attendees to career services events
- Growth of employer interest in Trinity graduates of all majors
- YoY tracking of boards and organizations served on by Trinity community

Objective #7 Maintain brand consistency and market the Trinity story

Strategies

7.1.   Create meaningful brand messaging for external audiences
7.2.   Market the "fun" of the University by emphasizing unique campus life
7.3.   Use authentic, honest stories to highlight successful outcomes
7.4.   Establish and build social media presence for alumni, career services, President

Key Performance Indicators & Metrics:
- Increase in adoption and usage of brand guidelines among Trinity departments, offices, and programs
- Training of University offices on inside.trinity.edu and custom site templates
- Increase of Tiger Pride in staff, faculty, students, measured through internal surveys
- Establish baseline and grow engagement in University social media platforms

Objective #8 Increase alumni relations, engagement, and giving

Strategies

8.1.   Identify resources
8.2.   Establish processes and implement technology to support and measure effectiveness of an advancement communication plan
8.3.   Develop alumni communication plan that includes tactics such as Trinity magazine, email, Tiger Network, and more
8.4.   Ensure data integrity of the alumni and donor database
8.5.   Improve the alumni online giving experience
8.6.   Enhance alumni benefits through Tiger Network, the Tiger Enrichment Series, continued education, chapter events, and more
8.7.   Lay groundwork for capital campaign through transitioning to proactive research capabilities, helping build a robust campaign pyramid and pipeline
8.8.   Introduce predictive modeling as a tool for improving solicitations

Key Performance Indicators & Metrics:
- Increase undergraduate alumni participation to 20%
- Heighten awareness of the roles alumni can play on- and off-campus
- Shift from alumni relations staff as "friend-raisers" to alumni relations staff as co-fundraisers
- Establish programs that attract and engage alumni in lifelong learning
- Increase in Alumni Weekend registrations and participation
- Seventy-five percent (75%) of chapters attain "mature" status
- Continuous improvement utilizing emerging technologies and methods to increase annual giving
- Increase personalization in all communication engaging departments, centers, and affinity groups
- Increase volunteer engagement in the annual giving program
- Retain and increase gifts to the Associate program to create capital campaign pipeline
- Establish a robust Parent Council
- Formalize student giving program across all classes

Objective #9 Lay foundation for University Capital Campaign

Strategies
9.1.   Evaluate staffing and technology resources
9.2   Explore and implement a University e-commerce system that meets user expectations in the marketplace

LONG-TERM SUCCESS

In addition to measuring the success of specific tactics and maintaining the health of digital channels, UMC will measure progress toward mission-critical goals and objectives identified in this document. For each goal, the measurement may be qualitative, quantitative, or a combination of the two.

Though tracking of key performance indicators happen throughout the year, milestones for more comprehensive measurement may happen quarterly or annually. In some cases, measurement and analysis will require explicit allocation of resources, such as market research.

As UMC works with partners within the University to implement strategies, the team will develop action plans with specific tactics. These tactics will be generated collaboratively to ensure the University benefits from a truly integrated marketing approach.

Appendices

STAMATS AUDIT 2016
Read full audit at: http://bit.ly/1UTCJ0h

INTEGRATED MARKETING PLAN 2014
Review 2014 IMC Plan at: http://bit.ly/1FTyRUN

TRINITY TOMORROW STRATEGIC PLAN
Read information on the Trinity Tomorrow plan at: https://strategicplan.trinity.edu

INDUSTRY OVERVIEW

Aspirational Universities

Name	City	Enrollment	Avg. GPA	S/F Ratio	% out-of-state	Tuition
Amherst College	Amherst, MA	1,795	unlisted	7.6:1	86%	$49,730
Bates College	Lewiston, ME	1,773	unlisted	10:1	89%	$62,540 *
Bowdoin College	Brunswick, ME	1,799	3.8	9:1	91%	$47,744
Colby College	Waterville, ME	1,857	unlisted	9:1	86%	$47,060
Pomona College	Claremont, CA	1,650	unlisted	8:1	69%	$47,280
Smith College	Northampton, MA	2,478	3.94	9:1	82%	$46,288
Stanford University	Stanford, CA	6,999	3.95	4.4:1	61%	$45,729
Swarthmore College	Swarthmore, PA	1,542	unlisted	8:1	87%	$47,070
Tulane University	New Orleans, LA	8,339	3.51	9:1	76%	$45,758
Wellesley College	Wellesley, MA	2,323	unlisted	7:1	84%	$46,550
Wesleyan University	Middletown, CT	2,897	unlisted	8:1	92%	$48,704
Williams College	Williamstown, MA	2,099	unlisted	7:1	87%	$49,780
A V E R A G E		**2,963**	**3.80**		**83%**	**$47,427**
Trinity University	**San Antonio, TX**	**2,278**	**3.51**	**9:1**	**29.5%**	**$39,560**

* includes room and board

Similar Universities

Name	Enrollment	Avg. GPA	S/F Ratio	% out-of-state	Tuition
Beloit College	1,358	3.35	11 : 1	83%	$44,590
Bucknell University	3,569	3.54	9.2 : 1	77%	$51,676
Carleton College	2,014	unlisted	9.4 : 1	82%	$60,100 (approx)
College of Wooster	2,058	3.7	10.8 : 1	61%	$44,520
Colorado College	2,118	unlisted	10 : 1	82%	$48,576
Denison University	2,282	3.6	9.62 : 1	72%	$46,250
DePauw University	2,216	3.86	10 : 1	63%	$43,950
Grinnell College	1,705	unlisted	9 : 1	88%	$48,322
Lawrence University	1,561	3.64	9 : 1	71%	$44,544
Lewis and Clark College	2,209	3.88	12 : 1	89%	$46,534
Macalester College	2,172	unlisted	10 : 1	82%	$50,418
Oberlin College	2,961	3.58	8 : 1	92%	$49,928
Reed College	1,374	3.9	9:1	86%	$49,640
St. Olaf College	3,046	3.59	11.9 : 1	58%	$44,180
Trinity College	2,255	unlisted	9.6 : 1	83%	$48,446
A V E R A G E	**2,193**	**3.33**	**9.9 : 1**	**78%**	**$47,255**
Trinity University	**2,278**	**3.51**	**9 : 1**	**29.5%**	**$39,560**

Nearby Institutions

Name	Enrollment	Avg. GPA	S/F Ratio	% out-of-state	Tuition
Austin College	1,278	3.45	12 : 1	10%	$35,350
Baylor University	14,189	unlisted	15 : 1	27%	$37,996
Rice University	3,910	unlisted	6 : 1	50%	$41,560
Southern Methodist Univ.	6,411	3.64	11 : 1	54%	$44,694
Southwestern University	1,538	unlisted	12 : 1	12%	$37,560
Texas Christian Univ.	8,894	unlisted	13 : 1	45%	$40,630
University of Dallas	1,342	3.82	10 : 1	54%	$34,650
UT Austin	36,619	unlisted	17.53 : 1	unlisted	$9,806 * | $34,676 **
UT San Antonio	24,462	unlisted	23 : 1	2%	$5,982 * | $18,135 **
Texas A&M	48,960	unlisted	19.8 : 1	4%	$6,149 * | $24,742 **
A V E R A G E	**15,060**	**3.64**	**13.9 : 1**	**29%**	**$47,255**
Trinity University	**2,278**	**3.51**	**9 : 1**	**29.5%**	**$39,560**

* in-state

** out-of-state

TARGET AUDIENCES

External Audiences

As described in "Target Audiences" paragraph of the "Planning" section, existing awareness of Trinity and its unique academic offerings are limited among key external audiences. Therefore, the opportunity to promote a strong, relevant brand is significant. Growing the base of brand ambassadors will perhaps be Trinity's strongest asset to achieve IMC Plan objectives.

Listed below are target external audiences:

Prospective Students: This group will be high-achievers with a desire for academic, interpersonal and social challenges and opportunities. Ideally, this group will hear about Trinity from trusted brand ambassadors—students or alumni. The quality of Trinity's liberal arts education, the unique opportunities for undergraduate research and study abroad, and vibrant campus lifestyle should be the core elements of early brand exposure to this group.

Parents and Families of Prospective Students: This group includes parents, grandparents, siblings, and extended family members, all of whom can influence a student's decision on where to attend college. Especially important in this group are family members who are Trinity alumni. This audience will have unique insights into the prospective student and if Trinity is a good fit. Awareness of Trinity might come from a trusted source or even an advertisement, but further attention to the quality of education and the value of the completed degree will drive interest. This group will become highly aware of the financial cost of Trinity's education. This, along with a strong desire to find the best match for the prospective student, are significant factors when considering Trinity.

Adult Influencers of Prospective Students: This group will primarily be high school guidance counselors, teachers, coaches, tutors, private college counselors, and college exam tutors. Their insights into the differences between universities coupled with first-hand knowledge of students' personalities and abilities, make adult influencers ideal ambassadors for Trinity. These influencers should be reached with very targeted messaging about Trinity's academic quality, unique campus culture and the many meaningful opportunities for students to participate and make an impact.

Donors: While strong branding and community relations will be important to acquiring and retaining donors, this group is also a referral resource for potential students. Special effort should be paid to providing donors behind-the-scenes insights into how their donations are supporting Trinity's students. Within the donor group, the University will seek out individuals who can positively impact University reputation and influence on recruitment.

Community Members and Employers: This group includes employers, business owners, local politicians, thought leaders and participants in on-campus events as well as key individuals in traditional and digital media. Their potential to grow into ambassadors, influencers, and donors should be top of mind when reaching out to these individuals and organizations.

While the messaging may be different for each of these groups, there are some core approaches that will be consistent. In the initial phases, the priority will be reaching individuals in identified key markets in Texas with a compelling invitation to visit campus. As the geography expands, so does the message, transitioning from invitations and engaging testimonials to Trinity's exceptional academic reputation and educational outcomes.

Internal Audiences

Though the majority of resources will be used to increase desired outcomes among external audiences, earning commitment and loyalty from Trinity's internal audiences must always be a priority particularly as Trinity seeks to further empower brand ambassadors.

Though each of these groups will have their own key perspectives and expectations of Trinity, based on survey results and feedback from President Danny Anderson's 2016 listening tour reflects the importance of increasing Trinity's brand awareness.

ALUMNI RELATIONS AND DEVELOPMENT DIVISION STRATEGIC PLAN

The Office of Alumni Relations and Development worked with their internal team to develop 3-5 year goals, strategies, and key performance indicators. These are outlined in their 2017 Strategic Plan on the following pages. Focus areas, as they relate to the UMC integrated marketing plan, are included in the objectives and strategies section.

	Alumni Relations	Annual Giving	Special Events
Mission Statement… *To establish a culture of philanthropy at Trinity University*	Interest, inform, engage, and organize alumni to promote and support Trinity University and to work with the National Alumni Board to create mutually beneficial relationships among alumni and with the University throughout the lives of alumni.	The Annual Giving Office engages and cultivates relationships with Trinity alumni, parents, friends, and community members to perpetuate the spirit of Trinity through a culture of philanthropy and engagement.	Strategically envision, plan, and execute events that provide opportunities to engage and steward donors, collaborate across constituent groups to strengthen alliance with the TU mission, and foster life-long relationships between the donor and TU.
3 to 5 Year Goals	• Heightened awareness of the roles alumni can play on- and off-campus • Nationally recognized alumni social media strategy • Stronger ties to students that engage them in alumni activities that demonstrate student responsibility to give back after graduation • Paradigm shift from alumni relations staff as "friend-raisers" to alumni relations staff as co-fundraisers • Established alumni education program that attracts alumni and engages them in learning inside and outside the University • An Alumni Weekend model that is tailored to the University's needs and makes most people happy • Active involvement and partnership in the capital campaign with the outcome of re-energizing alumni engagement • Seventy-five percent (75%) of chapters attain "mature" status • Affinity Networks operational and engaging alumni regardless of their geographic proximity to one another	• Continuous improvement utilizing emerging technologies and methods to increase annual giving • In preparation for the Capital Campaign, move from all staff solicitations to include mostly peer/volunteer solicitations • Increased personalization in every touch engaging departments, centers, and affinity groups • Increased volunteer engagement in the annual giving program • Increased undergraduate alumni participation to 20% • Goal for annual giving including Major Gifts portfolios and Annual Giving teams • Shared responsibility of Annual Giving goals with volunteer groups like NAB, BOV, PLC, and BOT • Create a class agent system • To create a Capital Campaign pipeline, retain and increase gifts to the Associate program • Establish a robust Parent Leadership Council • Formalize student giving program across all classes	• Engaging the right people in the right events to maximize TU giving • Envisioning new events that lead to increased donor engagement and giving • Event planning and execution assistance to TU departments, programs, and targeted affinity groups • Event support for successful completion of current mini campaigns and annual giving program • Design and execution of events that drive measurable satisfaction • Plan and execute cultivation and regional events in support of the Capital Campaign • Maximize giving opportunities for donors through participation in special events

Consulting services provided by Critical Path Strategies, Inc.

Major Gifts	Advancement Services	Leadership
The purpose of the Major Gifts and Planned Giving Program is to work with those individuals who have both the financial capability and the affinity for Trinity University's cause to provide the greatest level of support for the University's mission.	Through substantial and sensible investment of time and effort, Advancement Services builds integrated information systems and solutions, enabling data-driven decisions by delivering responsive, reliable, and actionable information & intelligence.	Position ARD as a strategic partner to the board of trustees and volunteer leadership across the TU community. Invest in people, process, and technology to enable and lead the ARD team based on agreed goals.
• Strengthen and expand current engagement opportunities for volunteers including Board of Trustees, Board of Visitors, National Alumni Board, Business Advisory Council, department Advisory Boards, Chapter officers. (Alumni Relations as well) • Mobilize a pool of volunteer leadership for all major fundraising initiatives • Implement an effective predictive modeling process to increase the number of viable major gift prospects • Develop and utilize compelling cases for support that are field-tested with constituent focus groups • Determine optimal coverage model for Major Gifts team including establishment of a Director of Foundation Relations • Implement stewardship plan that includes individualized plans for top-level donors and coordinate a recognition plan for donors at all levels • Increase planned giving expectancies from $59 million to $150 million by fiscal 2019-2020 • Support new President in developing his relationships with the University's top donors and prospects	• Build confidence in ARD reporting • Increase team global-access, scheduled & repeatable reporting solutions over ad hoc reporting • Introduce predictive modeling as a tool for improving solicitations • Track satisfaction & reliance on services offered to the division while demonstrating continued progress in service delivery • Improve departmental data/delivery in creation of actionable intelligence • Identify core set of peer institutions & engage in regular benchmarking • Lay groundwork for capital campaign though transitioning to proactive research capabilities to help build a robust campaign pyramid & pipeline • Enhance directory level data across the alumni/donor database; coordinate campaign/solicitation/ acknowledgement efforts with data collection	• Attracting and retaining a world-class team with a shared view of the responsibility of fundraising and mutual team trust • ARD optimally staffed (including volunteers) for operational fundraising and the imminent capital campaign • Foster accountability by developing and monitoring key performance indicators/dashboards for ARD • Staff Development Plan in place including mentoring • Departments, Centers, and affinity groups are partners with ARD's approach to fundraising and philanthropy • Technology and training in place to accomplish our work efficiently and accurately • Benchmark regularly with current peers and aspirant peers • Prepare the University, the Board, and our constituents for a transformational capital campaign • Training for new employees on ALL resources available to them within the division "that will help them succeed in their new role"

Alumni Relations	Annual Giving	Special Events
Mission Statement… *To establish a culture of philanthropy at Trinity University* **FY 2017 Initiatives & Metrics**		

Alumni Relations	Annual Giving	Special Events
• Featuring alumni through webinars or chapter lectures —Metric: 4 webinars or chapter events featuring alumni • Continue with communications intern —Metric: Intern works 12 hours/week • Have an event on campus hosted by TUAA for targeted student leaders with an educational component on philanthropy, why I give to Trinity —Metric: Event involves 4 alumni and 50 student leaders • AR staff to receive training on how to solicit —Metric: AR staff rate their comfort level as "mostly confident" • Create framework for a comprehensive alumni education program managed by Director of Alumni Education —Metric: Plan for Year 1 created • Revive Leadership Conference at June NAB (4 trainers, 4 tracks) —Metric: Alumni volunteers rate their satisfaction highly after conference • Survey alumni on their Alumni Weekend needs —Metric: 150 people complete survey • Determine number of alumni engagement opportunities and grow that number by 25% —Metric: 25% growth • Provide leadership training to 100% of chapters —Metric: 22 chapters trained on leadership development • Support creation of a Financial Affinity group —Metric: Group of alumni identify themselves as being part of this network and gather virtually/physically at least once	• Crowd-funding site developed and introduced • Identify volunteer portal program • Reunion committees for each 2017 reunion class • Creating an advisory group or focus group(s) for various appeals • Secure Class Agent for 2017 reunion classes 25 and 50 • Create strategy for moving Associates to the next giving level • Identify prospects to join Associates and PLC • Create strategy for moving Parent donors to the next giving level • Communicate goals and updates to various volunteer groups • Metrics: —Annual giving goals —Undergraduate alumni participation in annual giving —Number volunteers engaged	• In collaboration with ARD departments, strategically envision, plan, and execute events that result in increased attendance among these constituent groups: 1st time attendees, donors, alumni, and parents —Metric: Increase by 10% for each measured group • Increase the number of new events that lead to increased constituent engagement —Metric: 5 new events • In collaboration with TU departments, programs, and targeted affinity groups, increase the number of event planning and execution assistance opportunities —Metric: 2 presentations per month to promote event planning assistance • In collaboration with Annual Giving and Major Gifts, increase the number of events that support mini campaigns and annual giving programs —Metric: 5 events • Increase event satisfaction as measured by Net Promoter —Metric: Net Promoter Score of 50 and NOT the majority of event attendees identified as promoters • In collaboration with Annual Giving, Major Gifts, and Alumni Relations, support cultivation and regional events for increased engagement of constituent groups and the success of the Capital Campaign —Metric: 20 cultivation and regional events in support of the Capital Campaign • Increase the number of non-donors who convert to donors through participation in special events —Metric: 10% increase in donor participation through special events

Consulting services provided by Critical Path Strategies, Inc.

Major Gifts	Advancement Services	Leadership

• Identify and assess existing department Advisory Boards
• Identify, orient and train volunteers for 2017 mini campaigns
• Develop process for capturing data in a consistent and accurate manner
• Draft and test one or two white papers/concept papers for fundraising priorities
• Analyze current and past success in order to replicate or adapt optimal coverage
• Determine set of donor centered metrics that encourage/measure meaningful engagement and effective cultivation for TU's top donors and prospective donors
• Identify top 10-15 donors who can best benefit with personalized stewardship plan
• Complete data entry for living planned giving donors in Gift Wrap
• Develop metric for division-wide gift officers for Planned Giving commitments
• Update on where President stands with Top 50
• Schedule regular prospect review meetings with President and Vice President
• Engage Trustees, as appropriate, in meetings and small dinners with top donors and prospects in target cities
 	
• Metrics:
  —Annual giving goals including major gifts
  —2020 Capital Campaign project plan execution (GYR)
  —Planned giving expectancy
	• Begin tracking new/first-time donors (may be via reporting)
	• Measure customer satisfaction with gift/bio entry through tracking internal/external emails, phone calls, & letters regarding corrections/adjustments. Begin to track for first time. Show #s and types-Year 1
	• Begin measurements on correct entry of data (ask Ken for review existing anomaly reports). Begin to count adjustments logged/types
	• Begin to demonstrate proactivity in research (might be 5-10%). Start with a goal of demonstrating at least 10% proactive research by end of FY. Undertake and complete a defined proactive research project
	• Build a self-service library of PDF research documents on all trustees
	• Identify and initiate research documentation project on $1M+ capital campaign prospects
	• Survey and measure baseline end user satisfaction of reporting & research with each report delivered. A-E=Meets need? 1-5=Timely? (A1=Great; E5=BAD)
	• Complete 'Phase 2' of Adv. Services Dashboard delivery/refinements, including new donor growth dashboard element
	• Identify 6 Benchmark Institutions for Adv. Services & begin to demonstrate comparative information (1 up-coming comparative; 3 comparable; 2 aspirationals). Begin to establish strong cross-contacts with at least 2 of these
	• Analyze ad hoc reports/data & identify initial list of scheduled reporting 'opportunities' by 12/31/16
	• Introduce at least one new channel for biographical data collection/enhancement in coordination with AF/Donor Relations
	• Create a Biographical Data Policies & Procedures Manual by end of FY
	• Metrics:
	  —Advancement services project execution
	  —Stewardship performance goals – timely, accurate acknowledgement
		• Determine the level of staffing and the quality necessary to consistently meet our short-term and long-term goals
		• Build a team culture that retains staff and attracts high quality candidates
		• Create a web site page tied to Alumni Relations & Development that shares more about our office culture
		• Establish a personal development plan for entire staff that encourages growth and improvement, including opportunities for mentoring
		• Find ways to consistently recognize great performance at all staff levels
		• Efficiently use our budget to produce the greatest results in fundraising
		• Begin rebuilding the confidence of faculty and staff through departmental support, philanthropic training, and inclusion in planning for capital campaign
		• Build a scalable framework for Departmental Advisory Boards
		• Shift VP's focus to external work while still aligning closely with departments within ARD Division
		• Lay the groundwork for the components of the capital campaign and launch a feasibility study to test those components
		• Implement ARD Dashboard and use it to track our progress and update outside constituents
		
		• Metrics:
		  —Team development investment
		  —Infrastructure project execution (GYR)
		  —Staffed to annual plans

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