## What is Advancement?

**DEFINITION**

Advancement is a University-wide initiative to increase the eminence of The Ohio State University through efforts to build awareness, engagement and giving among critical stakeholder groups, including students, faculty, alumni, Ohioans, corporate partners and national leaders.

**GUIDING PRINCIPLES**

Ohio State strives for its constituents to be a meaningful part of the life and success of the institution.

Advancement enables us to deepen our connections with all of our audiences to engage, inform, and inspire, and to jointly leverage our resources to accelerate Ohio State’s eminence.

Advancement streamlines and organizes us to provide powerful and engaging experiences, information, and support for our constituencies, and unites us to act as one university as we pursue our visionary and transformative goals.
Advancement will require integration of Communications, Development and Alumni Relations functions

**APPROACH**

Achieving these goals will require an integrated approach to enhancing Ohio State’s reputation, strengthening relationships and managing fundraising activities across three key functions:

- Communications and Marketing
- Development
- Alumni Relations

**ALIGNMENT**

The Advancement programs will be created on a foundation of aligned strategy that expresses Ohio State’s values and goals, an organizational structure that promotes integrated decision-making and communications, and processes and systems that support efficient data usage and analysis.
Advancement must express Ohio State’s shared values and goals to stakeholders

INTEGRATED AWARENESS, ENGAGEMENT AND GIVING FUNCTIONS ARE CRITICAL DRIVERS OF SUCCESS
In **Brand Positioning**, we will use research insights to articulate a differentiated core positioning of the Ohio State brand which can be leveraged by the University as a whole and by its units and colleges.

During **Organization Design**, we will evaluate the existing organization and use best practices to design an operating model that integrates communications, development and alumni relations.

The brand and organization workstreams will converge at **Strategize**, where we will design an integrated engagement and marketing plan to support Advancement efforts.

While **Engage** is not in scope for this effort, capabilities necessary for successful execution will be identified for future use.
Project Timeline

2011
December
5 12 10 26
January
2 9 16 23 30
February
6 13 20 27
March
5 12 19 26
April
2 9 16 23 30
May
7 14 21 28
June
4 11 18 25
July
2 9 16 23 30

2012
December
Winter Break
January
Winter Break
February
Spring Break
March
Winter Break
April
Winter Break
May
Winter Break
June
Winter Break
July
Winter Break

Finals
Spring Break
Summer Break

Project Launch

QUALITATIVE RESEARCH & ANALYSIS

Xmas
QUALITATIVE MESSAGE TESTING

Xmas
QUANTITATIVE ANALYSIS & SEGMENTATION

Xmas
QUANTITATIVE MESSAGE TESTING

Xmas
INTERNAL ASSESSMENT & LANDSCAPE ANALYSIS

Xmas
BRAND DEVELOPMENT & STRATEGY

ORG DATA GATHERING & ANALYTICS

FINAL DELIVERABLE

We are here
The Framework Planning Team is steering committee that provides overall strategic direction, decision-making and guidance over the development of the Advancement deliverables.

**Dr. Joseph Alutto**  
EVP and Provost, Academic Affairs

**Melinda Church**  
VP, University Communications

**Dr. G. Gilbert Cloyd, Chair**  
Board of Trustees

**Philip Duncan**  
Global Design Officer, P&G

**Christopher A. Ito**  
Treasurer, Board of Directors, The Ohio State University Alumni Association

**Jeff Kaplan**  
SVP, University Development  
President, The Ohio State University Foundation

**Linda Kass**  
Board of Trustees

**Kathleen McCutcheon**  
VP and Chief Human Resources Officer

**Sharen Turney**  
CEO, Victoria’s Secret

**Kate Wolford**  
AVP, University Advancement
Brand Positioning: What is brand equity?

**BRAND ELEMENTS PLAY DIFFERENT ROLES IN CREATING A BRAND EXPERIENCE**

Brand equity defines the enduring values or character of a brand that is differentiated, relevant and clearly connects with consumers on rational and emotional levels, influencing their choices of one brand over another, while logos and messaging will change more frequently.

**BRAND EQUITY**
- Classic American style with European refinement
- Sportsmanship, rugged
- Timeless; prestige
- Quality craftsmanship and details

**LOGOS**

**MESSAGING**

**ENDURING VALUES**

**LASTING IMAGES**

**SHORT-TERM CONVERSATIONS**
Brand Positioning: Defining The Ohio State University

OHIO STATE IS A COMPLICATED ENTITY WITH NUMEROUS BRANDS THAT SHOULD ALIGN AND MUTUALLY REINFORCE EACH OTHER, EVEN AS THEY CELEBRATE THEIR RELATIVE DISTINCTIVENESS

Each individual institution must be allowed to distinguish itself within its own competitive set and set of stakeholders...
Brand Positioning: Defining The Ohio State University

OHIO STATE IS A COMPLICATED ENTITY WITH NUMEROUS BRANDS THAT SHOULD ALIGN AND MUTUALLY REINFORCE EACH OTHER, EVEN AS THEY CELEBRATE THEIR RELATIVE DISTINCTIVENESS

... But, the central essence and enterprise brand equities of Ohio State should be shared and reinforced across all entities to the mutual and/or collective benefit of all.

Each individual institution must also be allowed to distinguish itself within its own competitive set and set of stakeholders...
Once we understand the central brand equity, it should permeate Ohio State’s brand experience

**BRAND EXPERIENCE ARCHITECTURE**

**BEHAVIOR**

**“HOW YOU ACT”**
The actions and decisions of OSU must reflect the brand’s core:
- Strategic vision/mission
- Rewards and incentives
- Recruitment
- Management policies
- Partnerships

**ENVIRONMENT**

**“WHERE YOU ARE”**
Ensure that consumer touchpoints convey the elements of the brand:
- Campuses, offices
- Website usability/interface
- Administrative offices
- Admissions Process

**PRODUCTS**

**“WHAT YOU DO”**
Confirm that products and services support the brand:
- Program Development
- Curriculum
- Events
- Research initiatives
- Social initiatives

**COMMUNICATION**

**“WHAT YOU SAY”**
Deliver clear and consistent brand messages aligned with core brand essence:
- Advertising
- Publications
- Media relations
- President and senior officer keynotes
- Public relations
- Website and social media

“Who You Are” is reflected by the core Brand Identity
Brand Advisory Group

The Brand Advisory Group is comprised of people from multiple roles with the University – faculty, students, administrators, staff, athletes – who will support the Brand Development work by providing the “voice of the University” and their respective groups in developing Ohio State’s enterprise brand equity,

**Kristen Convery**
Web Editor, University Marketing Communications

**Matt Fenstermaker**
Candidate for BA in Art Education, 2012
President, Student-Alumni Council

**Tim Gerber**
Professor, School of Music
Secretary, University Senate

**Kimberly Lowe**
Director, Alumni Clubs, The Ohio State Alumni Association

**Bill MacDonald**
Dean and Director, The Ohio State University at Newark
Executive Dean of Regional Campuses
Associate professor, Sociology

**Shashi Matta**
Assistant Professor of Marketing, Fisher College of Business

**Tracey Stuck**
Assistant Vice President, Student Life

**Liz Sullivan**
President, Student-Athlete Board
Former Captain, Women’s Soccer Team
BS Psychology, Winter 2012

**Dr. Andy Thomas, MD, MBA**
Medical Director, Wexner Medical Center
Assistant Professor, Clinical Internal Medicine, Wexner Medical Center
What have we learned?

INSIGHTS FROM DISCOVERY PHASE

BRAND
• The **mission and brand essence of Ohio State are** intuitively well understood, but **not crisply articulated**

SEGMENTATION
• We have identified **five attitudinal and behavioral segments for alumni**, of which three seem to be high potential for engagement and development
• In surveying alumni and non-alumni friends, **interest in increased engagement activities outpaces current participation** or perceived ways to participate

ADVANCEMENT ORGANIZATION
• **Ohio State is complex and evolving**, so we’re building the plane while we’re flying it
• The raw materials of the organization structure are largely in place, but there is clearly a need to **improve governance models** to clarify decision-making and **create communication mechanisms** that support integrated strategic planning
• Experts say **there is no “right” Advancement model**
  – Some best practices exist, including clarity of roles, accountability, disciplined tracking and sharing of data, and non-duplication of efforts
  – Specific Advancement models, however, should reflect the school’s current strategic vision, environment, leadership and culture
Project Next Steps

COMPLETE BRAND DEVELOPMENT PHASE

• Develop core brand positioning, equity statement and messaging, leveraging the qualitative and quantitative insights

• Engage Brand Advisory Committee as a critical part of the process of testing hypotheses and refining the outcomes.

COMPLETE ORGANIZATIONAL DESIGN

• Synthesize the complete findings from the organizational interviews (e.g., Board of Trustees, Deans, Advancement team members)

• Propose and test organizational models which will address the gaps in strategy, structure and process