



President's Task Force on Integrated Marketing

Final Report

April 1, 2007

Table of Contents

Executive summary	2
Task Force final report	4
Subcommittee on sub-brands final report	7
Subcommittee on admissions & enrollment final report	9
Subcommittee on internal communications final report	12
Task force and subcommittee goal & member list (Appendix A)	13
Integrated marketing initiative timeline (Appendix B)	17
Message-on-a-page (Appendix C)	21
Internal launch schedule (Appendix D)	22

President's Task Force on Integrated Marketing Final Report

Executive Summary

In January 2005, President Daniel O. Bernstine formed the Task Force on Integrated Marketing, charging its members with guiding and engaging Portland State's campus community in a process to translate the University's mission, vision, and values into a set of key messages and a visual identity program to help close the gap between perception and reality. The following is a summary of the Task Force's results and recommendations for future consideration.

Summary

To begin the process, the Task Force hired an expert firm to conduct a University-wide audit of marketing and communications operations. Over two years, an extensive list of outcomes has been achieved. The Task Force is pleased to report that its charge was successfully accomplished and all major recommendations and strategic issues identified in the communications audit report were addressed.

The chief outcome is the campus community's work in clarifying the University's brand message—articulating that “Portland State University's intentional academic engagement and connection with the Portland urban area provides exceptional opportunities for learning, service, research, and achievement.” Defining themes are *urban, sustainable, diverse, opportunity for all, research, partner, international, and surrounded by beauty*.

A supporting visual identity program was also developed. It includes a new PSU logo, three sub-brand logos, eight school/college logo treatments, re-design of *Portland State Magazine*, publication design, top-level Web design, stationery, business cards, envelopes, electronic templates for stationery, flyers, and brochures, mailing labels, an identity standards guide, guidelines for logo, color, and typography, ad design, presentation folders, note cards, electronic signature, name tags, print newsletter design, and electronic newsletter design.

Nearly 4,000 members of the campus community participated over the two-year development period. The length of the process was critical to internal buy-in and laid the groundwork for a receptive campus climate. To date, the new identity has been broadly adopted and well received across campus. This process has also helped set the stage for further academic planning and prioritization of programmatic leadership positions.

Task Force Recommendations

1. Fund greater institutional promotion once academic planning solidifies in the form of a comprehensive marketing campaign that includes advertising.
2. Continue integrating brand messaging throughout campus.
3. Address issues with employee communications and morale.
4. Research and recommend strategies and tactics to build student pride and affinity for the University.
5. Reprioritize the work of University Communications and develop greater alignment with Admissions.
6. Benchmark brand identity progress and assess external perceptions about the University.
7. Assess internal perceptions of communications and understanding of strategic direction at regular intervals.
8. Continue to evaluate Athletics, PSU Alumni Association, PSU Foundation and other related entities such as Extended Studies for alignment within the overall University brand.
9. Implement subcommittee recommendations.

Subcommittee Recommendations

Internal Communications Subcommittee

1. Take additional steps to mend negative internal perception of Portland State. The “injured voice” identified in the creative brief was of considerable concern to the subcommittee. Problems with internal communication are identified as a significant barrier to accomplishing greater positive pride and morale on campus. (An employee communications task force has been formed to work on these issues.)

2. Develop employee events that foster collegial spirit. Consider bringing back a faculty lounge or similar space.
3. Explore steps to further integrate key messages in student and new employee orientation, faculty and student convocation, campus tours and Commencement in 2007/08. Consider giving every new employee a lapel pin, window decal, identity guidelines and key messages at orientation.
4. Engage Athletics, ASPSU, and others in leading or participating in a task force that evaluates and recommends institutional change that will help build student pride and event participation.

Sub-brand Subcommittee

1. Migrate Athletics to the new PSU green from Viking green over time.
2. Evaluate sub-brands periodically for alignment within the overall University brand.

Admissions and Enrollment Subcommittee

The Subcommittee focused on areas of best practice and identified these recommendations for improved recruitment and outreach.

1. Better incorporate the University's primary and secondary messaging in admission acceptance letter copy, high school and community college visitation posters as well as housing publications.
2. Engage Admissions, Records, and Registration in developing a "How to Succeed in College" program for students in their junior year of high school. This targeted and personalized program across all academic majors is suggested to be a variation of the School of Business program for entering high achieving freshman.
3. Develop a more comprehensive Banner coding to track communication to prospective students and to track extended campus students all in the same system.
4. Engage University Communications in providing input to individual school/college website design, print and broadcast advertising as well as program brochures for two reasons. First, to promote integration of branding elements and second, to coordinate efficient purchase of broadcast and print media.
5. Increase admission yield by finding ways for the University to foster faculty engagement with prospective students at both the undergraduate and graduate level.
6. Provide more training for Orientation and Campus Tour guides about Athletics. Promotion of student involvement and support for athletic events at these early introductions to Portland State will help "imprint" prospective students interested in athletics with "Viking spirit."
7. Develop a graduate brochure that provides prospective students with a "sense of place." It would give prospects an idea of the graduate experience at Portland State. Messages included would focus on graduate enrollment and demographics, opportunities and examples of community engagement, Portland's livability as well as information about housing and resources for graduate students. In addition, a comprehensive listing of graduate program offerings, departmental web links and information about application to the institution as well as the department would be included.
8. Assess graduate student recruitment methods, techniques, and practices including overall graduate studies at PSU. Utilize seminars and training programs available by organizations such as AACRAO and Graduate and Professional School Enrollment Management Corporation.
9. Fund promotion for University academic programs. The committee acknowledged the University's resource challenges, but strongly recommends investment in institutional image marketing.

President's Task Force on Integrated Marketing Final Report

Overview

In January 2005, President Daniel O. Bernstine formed the Task Force on Integrated Marketing, charging its members (Appendix A), with guiding and engaging Portland State's campus community in a process to translate the University's mission, vision, and values into a set of key messages and a visual identity program to help close the gap between perception and reality.

To begin the process, the Task Force hired an expert firm to conduct a University-wide audit of marketing and communications operations. Since then, nearly two years of work and an exhaustive list of outcomes have been accomplished. The following provides a review of major recommendations and strategic issues identified in the audit, the results and a brief summary of the actions taken by the University.

Communication Audit Recommendations

1. Define the central marketing unit at Portland State as a central intelligence function that drives brand management and informs university decision-making.

University response:

- a. Provided newly formed Office of University Communications the authority to manage the University's identity.
- b. Developed approval process for all external communication.

2. Clarify the university brand so all campus marketers consistently deliver key messages, adhere to graphic standards, and incorporate images that convey PSU's mission and provide a competitive advantage.

University response:

- a. Worked with the campus community over an 18 month period to develop a new brand identity for the University. Substantial outcomes are outlined in the attached timeline document (Appendix B).

3. Make immediate resource investments in staffing and research. Reorganize the offices of marketing & communications and publications to form an office of brand marketing, led by an assistant vice president for brand marketing who reports to the vice president for university relations.

University response:

- a. Merged Office of Marketing and Communications and Publications into Office of University Communications for more effective collaboration.
- b. Replaced two vacant director positions with one Assistant Vice President for University Communications.
- c. Replaced vacant desktop publishing position with a graphic design position.
- d. Allocated resources to hire an additional graphic designer.
- e. Advocated and received a strategic investment from the University to hire two Web communications positions.

4. Implement key integrated processes to foster campus support for brand marketing and begin to coordinate messages and activities. The president's task force on integrated marketing should have action-oriented sub-groups in admissions, reputation, sub-brands (units), and internal marketing. An editorial priorities committee will search out the reputation-defining stories of the university and map out a strategic plan for telling them.

University response:

- a. Formed sub-groups in admissions and enrollment, sub-brands, and internal marketing. (Significant outcomes and recommendations for each group are attached.)

- b. Formed an editorial priorities committee in University Communications to integrate stories for all communication tools and identify and incorporate engagement stories.

Communication Audit Recommendations on Strategic Issues

1. *Mission and vision.* Key tenets of the mission and vision are causing tension in many areas of campus ... access and community connectedness vs. a stronger research orientation; the push for more traditional students vs. a limited traditional campus experience and support system; “urban” and “large” as accurate depictions of the university’s competitive advantage. Changing the mission is not the answer; developing a consensus as to the common definitions of these themes is.

Outcome:

Through the identity development process, the campus community agreed on the University’s distinctive advantage and defining themes (Appendix C).

2. *Goals and planning.* Successful marketing is accountable to university goals, which either don’t exist or are not well known. Make the university goal-setting and planning process more transparent to the university community. Make communicating goals and vision a priority so everyone sees how their work contributes to the overall advancement of the university. The vice presidents must take ownership of this process.

Outcome:

Administrative leadership began the process of strategic goal-setting and planning. The campus community is invited to participate in a symposium on this topic in January 2007.

3. *Authority and investment.* The president and administrative leadership must lay to rest a sweeping campus concern about this process being just one more new initiative devoid of resources or support. The president must offer tangible proof of investment, mandate participation and cooperation from all campus units, and bestow authority in a central brand marketing function.

Outcome:

The President and administrative leadership:

- a. Invested a one-time budget allocation for this process
- b. Mandated participation and cooperation from all campus units
- c. Authorized University Communications as the central brand marketing function

Summary

1. Nearly 4,000 members of the campus community participated over the two-year development period. The lengthy development process was critical to internal buy-in and laid the groundwork for a receptive campus climate.
2. Sockeye Creative, Inc., developed the visual identity package that includes refinements of the chosen logo, three sub-brand logos, eight school/college logo treatments, re-design of *Portland State Magazine*, publication design, top-level Web design, stationery, business cards, envelopes, electronic templates for stationery, flyers, and brochures, mailing labels, an identity standards guide, guidelines for logo, color, and typography, ad design, presentation folders, note cards, electronic signature, name tags, print and electronic newsletter design.
3. The visual identity has been broadly adopted and well received across campus.
4. Academic planning builds on the success of the identity work.

Task Force Recommendations

1. Fund greater institutional promotion once academic planning solidifies in the form of a comprehensive marketing campaign that includes advertising.
2. Continue integrating brand messaging throughout campus.
3. Address issues with employee communications and morale.

4. Research and recommend strategies and tactics to build student pride and affinity for the University.
5. Reprioritize the work of University Communications and develop greater alignment with Admissions.
6. Benchmark brand identity progress and assess external perceptions about the University.
7. Assess internal perceptions of communications and understanding of strategic direction at regular intervals.
8. Continue to evaluate Athletics, PSU Alumni Association, PSU Foundation and other related entities such as Extended Studies for alignment within the overall University brand.
9. Implement subcommittee recommendations.

President's Task Force on Integrated Marketing Subcommittee on Sub-brands Final Report

The Sub-Committee on Sub-brands was charged by Cassie McVeety as head of the Integrated Marketing Committee Task Force with helping consolidate the variety of logos and identities floating around the University, and bring these different academic units, programs and affiliated organizations under the larger PSU umbrella.

The committee, comprised of members identified in Appendix A, first met in June 2006 and identified its charge and action items as follows:

Sub Committee Charge

To establish protocols and policies that support the overall PSU brand identity and message and that colleges, departments, centers, auxiliary operations, athletics and satellite organizations (Alumni Association, Extended Studies, etc.) can refer to when developing identity and marketing materials.

Action items

- > Define audiences under the PSU brand
- > Define audiences under PSU sub-brand
- > Define audiences under separate identity with minimal relationship to PSU brand
- > Develop a common umbrella message and specific message points drawn from the message on a page and creative brief.
- > Propose a central graphics/message “toolbox” for use by specific units
- > Suggest strategies to the Office of Marketing and Communication for management and oversight of the sub unit's use and endorsement of the institutional brand.

Committee Progress

Over a series of summer meetings, the committee discussed common message themes, but concentrated its efforts on a policy regarding logo/identity use.

As part of the fact finding, the committee assembled a notebook of other school/university treatments and spoke to a number of departments/groups on campus. The key meeting was one with Athletics, in which Cassie McVeety and Maureen O'Connor discussed the challenges of fitting the athletic department into the new color and look.

Understandably, the Athletic department, including all the teams and clubs, have invested heavily in uniforms and merchandise with the old color. To shift to the new color, which is not standard, would require a financial investment that neither the Athletic department nor the University is prepared to make at this time. Over time, however, the Athletic Department will consider migrating to PSU green from Viking green.

The Athletic Department also has several “spirit marks” that are licensed but not consistently used. In an effort to consolidate these marks, it was agreed to limit the marks to the Viking helmet as the key spirit mark. This mark was integrated into the Athletic department letterhead and logo.

As a result of these conversations, the committee recommended a three-tiered identity structure:

Tier 1: PSU-only identity for all programs, departments that are common to the entire University, i.e. admissions, facilities, library, etc.

Tier 2: PSU plus school/college identity (including logo) that would be used for academic colleges, including Maseeh College, College of Urban and Public Affairs, School of Business, School of Fine & Performing Arts, School of Extended Studies, Graduate School of Social Work and School of Education and College of Liberal Arts & Sciences.

Tier 3: PSU-affiliate separate identity for three organizations: Athletics, Alumni Association and PSU Foundation.

These recommendations were presented to the work group, which easily accepted the Tier One and Tier Three options, but was resistant to Tier Two. The group recommended presentation to the Council of Academic Deans. In this meeting, the Deans stated that they wanted a PSU brand only, which indicated a departure from standard typographic treatment of school/college identities, particularly in the case of named schools.

Follow-up meetings were held with marketing and development directors from each of the schools and colleges and refinements were made to the original design so that the PSU identity was dominant, but the schools and colleges were represented in the same logo mark in a subordinate way.

The marketing and development professionals then worked with their deans to approve this combined identity approach, which was achieved in September and integrated into the graphics standards manual shortly after.

Results

1. Graphic standards limitations were established that allowed for a maximum of three tiers of identity, but common accommodation of programs, centers etc. within collateral design.
2. A recommendation was made that all units/departments/programs that planned to run mass media advertising would have to clear the advertising through the work group, or some representatives of the work group. All other work such as flyers, small collateral etc. would be expected to follow graphics standards, but not monitored or approved like mass media advertising. This was communicated to university marketing professionals during the campaign roll-out.

President's Task Force on Integrated Marketing Subcommittee on Admissions & Enrollment Final Report

The Integrated Marketing Task Force Subcommittee on Admissions and Enrollment met on four occasions during the period, June-October 2006. Committee members are identified in Appendix A.

Subcommittee Charge

The Integrated Marketing Task Force charged the Admissions & Enrollment subcommittee to:

1. Review the University's recent "Message on a Page" and its creative brief and to identify pertinent areas of focus for the University's recruitment audiences;
2. Define and prioritize recruitment audiences;
3. Review and provide input to the University's recruitment strategies and campus visitation experience.

Outcomes

1. Message on a Page and Creative Brief

The Subcommittee reviewed these documents and determined that University recruitment strategies are typically consistent with central messaging and the creative brief.

Key messages of location and urban engagement, diversity, quality and breadth of programs are integrated into core recruitment messaging.

2. Recruitment Audiences

The subcommittee defined priority recruitment audiences as:

- a) Undergraduate freshmen
- b) Undergraduate transfer
- c) Students of color
- d) High Achieving undergraduates
- e) Out-of-state undergraduates
- f) International students
- g) Extended campus and distance education students
- h) Student athletes
- i) Graduate students

The subcommittee examined existing recruitment practices relating to these audiences. Findings are summarized below.

Domestic Undergraduate Recruitment Presentation

New Student Programs' staff presented recruitment strategies and individual communication plans targeting undergraduate freshmen and transfer students, students of color, high achieving undergraduates and out-of-state students. Publication messaging and targeted correspondence was reviewed. A calendar of outreach activities supported by separate messaging for each audience target, campus visitation programs, direct mail vehicles, electronic correspondence, telephone, blog and online chat sessions are among the regularly scheduled communication components that occur throughout the year.

Jennifer Cardenas described the data base of information which stores prospective student demographics, academic interest areas, GPA and test scores. This prospective student data is available to departments who seek to augment central admissions' recruitment activity.

New Student Program challenges include lack of professional staff to supervise the student-run campus visit program, lost outreach opportunities due to limited staffing as well as reduced scholarship funding for high

achieving students. The use of student employees to manage campus visit programs and counsel students about admission decisions is outside the CAS standards of ethical practice. This is of great concern.

International Recruitment Presentation

International admission data and programming was presented by Paula Harris. Primary audiences include students in India, Japan and Korea. Outreach in Asia combined with electronic follow up is the primary communication vehicle. International admissions staff also supports alumni and student receptions in the Middle East and Asia.

International admission yield is positively correlated with the speed of admission decision, and particularly, the speed of I-20 delivery. Paula expressed continued challenges in meeting swift turn-around of the admission decision. Other challenges include ongoing development of effective communication plans for international students as well as continued outreach to changing graduate selection committees to help them understand how international transcripts are equivalent to the US GPA scale.

Off-Campus and Distance Education Students

Extended Studies' outreach programs were presented by Bee Jai Repp, Bill Prows, Olivia Alcaire, Bob Shrunk and Felix Oliveros. Recruitment and outreach is conducted at all PCC campuses, as well as Chemeketa and Mt. Hood Community Colleges. Recruitment is done in collaboration with the Office of Admissions, Registration & Records (ARR). It was recognized that there is some overlap and duplication of recruitment and outreach work being done by the offices. The decentralized staffing arrangement poses challenges for ongoing communication of recruitment information and academic program changes between the Extended Campus office and central university departments.

Bill Prows presented support for continued integration of Extended Studies' program messaging with the core Brand messaging. For example, under his management, the Extended Studies' web and graphic design professionals will more closely work with Marketing Communications to integrate University design elements and messaging will more thoroughly.

Student Athletes

Highly individual athletic recruitment is done in accordance with NCAA regulations. Scott Herrin presented the separate and specialized branding of Portland State athletics. Consistent with the integrated marketing goals, Scott presented ideas for closer collaboration with the Campus Visits and Orientation Office functions. Challenges include training of student tour guides about athletics as well as ongoing promotion of student attendance at athletic events.

Graduate Students

Business and engineering graduate recruitment presentations by Marcia Fischer (MCECS) and Maureen O'Connor (SBA) illustrated the extent to which research and ranking information affects enrollment. Both professional schools' key messages relate to quality research opportunities, niche focus study, industry connection and supportive learning environments. Publication development is becoming increasingly congruent with integrated marketing messaging and design.

Graduate recruitment is challenging because it is conducted in a decentralized way by individual faculty. It is expensive to target qualified prospects. Further, recruitment follow up to graduate prospects often requires time-consuming faculty engagement.

3. University recruitment strategies

Admissions and Enrollment Subcommittee

The Subcommittee focused on areas of best practice and identified these recommendations for improved recruitment and outreach.

1. Better incorporate the University's primary and secondary messaging in admission acceptance letter copy, high school and community college visitation posters as well as housing publications.
2. Engage Admissions, Records, and Registration in developing a "How to Succeed in College" program for students in their junior year of high school. This targeted and personalized program across all academic majors is suggested to be a variation of the SBA program for entering high achieving freshman.
3. Develop a more comprehensive Banner coding to track communication to prospective students and to track extended campus students all in the same system.
4. Engage University Communications in providing input to individual school/college website design, print and broadcast advertising as well as program brochures for two reasons. First, to promote integration of branding elements and second, to coordinate efficient purchase of broadcast and print media.
5. Increase admission yield by finding ways for the University to foster faculty engagement with prospective students at both the undergraduate and graduate level.
6. Provide more training for Orientation and Campus Tour guides about Athletics. Promotion of student involvement and support for athletic events at these early introductions to Portland State will help "imprint" prospective students interested in athletics with "Viking spirit."
7. Develop a graduate brochure that provides prospective students with a "sense of place." It would give prospects an idea of the graduate experience at Portland State. Messages included would focus on graduate enrollment and demographics, opportunities and examples of community engagement, Portland's livability as well as information about housing and resources for graduate students. In addition, a comprehensive listing of graduate program offerings, departmental web links and information about application to the institution as well as the department would be included.
8. Assess graduate student recruitment methods, techniques, and practices including overall graduate studies at PSU. Utilize seminars and training programs available by organizations such as AACRAO and Graduate and Professional School Enrollment Management Corporation.
9. Fund promotion for University academic programs. The committee acknowledged the University's resource challenges, but strongly recommends investment in institutional image marketing.

In general, faculty and staff expressed surprise to learn the extent to which the strategic and targeted University recruitment occurs. The committee members support continued integration of messaging as well as continued communication across enrollment sectors to maximize outreach and recruitment yield.

President's Task Force on Integrated Marketing Subcommittee on Internal Communications Final Report

Sub-group goal: to market brand identity to faculty, staff, and students. Committee members are identified in Appendix A.

Overview: The following provides a review of recommendations identified in the communications audit for the internal sub-group, a brief summary of the actions taken, and recommendations for further evaluation.

Recommendations:

1. Once the brand is clarified, develop a plan for introducing and placing the brand and/or mission statement into the campus environment...

Sub-group response:

- c. Recommended tactical solutions that would set the stage for a successful implementation such as the development of user-friendly templates, tips for the campus community on ways to authentically integrate key messages, the development of how-to training sessions, thoughts on leadership's role in supporting the process, and ways to incorporate the identity into the physical campus environment. Most recommendations have been or are in the process of being implemented.
- d. Brainstormed ideas and developed an identity launch plan for students, faculty, and staff (Appendix D).
- e. Identified *Currently* as a critical vehicle to communicate engagement stories internally. (Fall 2006, *Currently's* editor began incorporating an engagement story in each issue.)

Sub-group recommendation:

- a. Take additional steps to mend negative internal perception of Portland State. The "injured voice" identified in the creative brief was of considerable concern to the subcommittee. Problems with internal communication are identified as a significant barrier to accomplishing greater positive pride and morale on campus. (An employee communications task force has been formed to work on these issues.)
 - b. Develop employee events that foster collegial spirit. Consider bringing back a faculty lounge or similar space.
2. Discuss with human resources, academic affairs, and student affairs ways to communicate the Portland State brand at new faculty, staff, and student orientation.

Sub-group response:

- a. Bill Ryder (Orientation coordinator), Ebru Korbek (Commencement coordinator), Jenny Sherman (human resources orientation coordinator), and Donna Bergh (Convocation coordinator) participated in the sub-group and incorporated the identity into their programs.

Sub-group recommendation:

- a. Explore steps to further integrate key messages in student and new employee orientation, faculty and student convocation, campus tours, and Commencement in 2007/08. Consider giving every new employee a lapel pin, window decal, identity guidelines and key messages at orientation.
3. Work with brand marketing, student affairs, academic affairs, and human resources to better incorporate an introduction to athletics as part of student life to new students and new faculty and staff.

Sub-group response:

- a. The sub-group did not have the opportunity to fully discuss and develop this topic.

Sub-group recommendation:

- b. Engage Athletics, ASPSU and others in leading or participating in a task force that evaluates and recommends institutional change that will help build student pride and event participation.

Appendix A

President's Task Force on Integrated Marketing Goal and Member List

Task Force on Integrated Marketing

Goal: To help guide and engage the campus community in an authentic and meaningful process to translate the University's mission, vision, and values into a set of key messages and a visual identity program.

- > Chair, Cassie McVeety (University Relations)
- > Staffed by Leslie Watkins (Marketing & Communications)
- > Nate Angell (Marketing & Communications)
- > Cindy Bernert-Coppola (Engineering & Computer Science)
- > Justin Bernstine (Student Activities & Leadership Programs)
- > Jennifer Cardenas (Admissions)
- > Duncan Carter (English, Faculty Senate)
- > Cynthia Lou Coleman (Communication)
- > Michael Cummings (Geology)
- > Lindsay Desrochers (Finance & Administration)
- > Walt Fosque (Art)
- > Scott Herrin (Athletics)
- > Agnes Hoffman (Admissions)
- > Kathi Ketcheson (Institutional Research & Planning)
- > Maureen O'Connor (Business Administration)
- > Robyn Pierce (Facilities)
- > Bill Prows (Extended Studies)
- > ASPSU Representative (Associated Students of Portland State University)
- > David Santen (Marketing & Communications)
- > Julie Smith (Marketing & Communications)
- > Pat Squire (Alumni Association)
- > Jean Tuomi (Publications)
- > Cate Whitcomb (Publications)
- > Jennifer Williamson (Government Relations)

Task Force Workgroup

Goal: Manage the day-to-day tasks required to develop and integrate the new identity

- > Chair, Julie Smith (Marketing & Communications)
- > Cassie McVeety (University Relations)
- > Maureen O'Connor (Business Administration)
- > Pat Squire (Alumni Relations)
- > Scott Herrin (Athletics)
- > Molly Moore (Athletics)
- > Jean Tuomi (Publications)
- > Nate Angell (Web Communications)
- > David Santen (Marketing and Communications)
- > Jenny Cardenas (Admissions)

- > Agnes Hoffman (Admissions)
- > Cate Whitcomb (Publications)

Vendor Selection Committee

Goal: To select a creative services firm to develop a visual identity for Portland State

- > Chair, Julie Smith (Marketing & Communications)
- > Justin Bernstine (Student Activities and Leadership)
- > Tom Burman (Athletics)
- > Jennifer Cardenas (Admissions)
- > Cynthia Lou Coleman (faculty, Communications)
- > Nancy Eichsteadt (Extended Studies)
- > Walt Fosque (faculty, Graphic Design)
- > Agnes Hoffman (Admissions)
- > Verity Keith (student, Graphic Design)
- > Bill Prows (Extended Studies)
- > Jean Tuomi (Publications)
- > Sandra Van De Bilt (student, MBA)
- > Kimberly Willson-St. Clair (Library)

Admissions and Enrollment Subcommittee

Goal: To offer strategy and support for student recruitment at all levels

- > Chair, Agnes Hoffman (Student Affairs)
- > Cassie McVeety (University Relations)
- > Maureen O'Connor (Business Administration)
- > Marcia Fischer (Engineering & Computer Science)
- > Bee Jai Repp (Extended Studies)
- > David Santen (Marketing & Communications)
- > Paula Harris (Admissions)
- > Scott Herrin (Athletics)
- > John Eckman (Residence Life)
- > David Burgess (Institutional Research)
- > John Reuter (Environmental Sciences)
- > Therese Graner (Marketing & Communications)
- > Duncan Carter (Liberal Arts & Sciences)
- > Jennifer Cardenas (Admissions)
- > Maureen Orr-Eldred (Graduate Studies & Research)

Sub-Brand Subcommittee

Goal: To develop and support the plans and activities of colleges, schools, and other key programs

- > Chair, Maureen O'Connor (Business Administration)
- > Cassie McVeety (University Relations)
- > Pat Squire (Alumni Relations)
- > Scott Herrin (Athletics)
- > Kimberly Wilson-St. Clair (Library)
- > Bill Prows (Extended Studies)
- > Jean Tuomi (Publications)
- > Cate Whitcomb (Publications)
- > Cindy Bernert-Coppola (Engineering & Computer Science)
- > Trish Hamilton (Urban Studies & Planning)
- > Julie North (Auxiliary Services)
- > Rob Fullmer (College of Liberal Arts & Sciences)
- > Ken Brown (Portland State Bookstore)

Internal Subcommittee

Goal: To market brand identity to faculty, staff, and students

- > Chair, Julie Smith (Marketing & Communications)
- > Cassie McVeety (University Relations)
- > Justin Bernstine (Student Activities & Leadership)
- > Scott Herrin (Athletics)
- > Ebru Korbek (Student Affairs)
- > Kathryn Kirkland (Publications)
- > Donna Bergh (Academic Affairs)
- > Bill Ryder (Orientation)
- > Jim Turner (Alumni Relations)
- > Jahed Sakun (Institutional Technology)
- > Donald Forsythe (Auxiliary Services)
- > Sukhwant Jhai (University Studies)
- > Jenny Cardenas (Admissions)
- > Debbie Kirkland (Finance & Administration)
- > Jenny Sherman (Human Resources)
- > Natalie Brehm (Bookstore)
- > Susan Forrester (Student)
- > Rudy Soto (Student)
- > Cate Whitcomb (Publications)

Consultants

Brand clarity and integrated marketing: Larry Lauer and Associates

- > Larry Lauer
- > Kelli Horst

Visual identity: Sockeye Creative, Inc.

- > Andy Fraser
- > Peter Metz
- > Thom Walters
- > Heather Ciri
- > Keith Danzinger
- > Erica Brinker
- > Robert Wees

Portland State's Integrated Marketing Initiative Timeline

“We are only as strong as the messages we send out to the community, and right now we are diluting our circle of influence with inconsistent communication. We have not maximized the tremendous progress of the University over the last 20 years.”—PSU President Daniel O. Bernstine

January 2005

President Daniel O. Bernstine forms the “Task Force for Integrated Marketing,” charging its members with guiding and engaging Portland State’s campus community in an authentic and meaningful process to translate the University’s mission, vision, and values into a set of key messages and a visual identity program.

February 2005

The University hires Larry Lauer and Associates, a renowned expert on marketing in higher education, to guide the Task Force. Lauer meets with the Council of Academic Deans, Executive Committee, Task Force for Integrated Marketing, and external relations professionals across campus to discuss integrated marketing communication in concept and practice.

April 2005

Lauer and Associates conducts a University-wide audit of marketing and communications operations by examining marketing materials and interviewing over 84 individuals.

May 2005

Lauer and Associates presents the Marketing and Communications Operations Audit, which provides recommendations for mounting an effective integrated marketing effort that will help Portland State accomplish its strategic goals. The audit addresses institutional strategic marketing issues, operational effectiveness, and the organization of day-to-day marketing and communication efforts. Presentations are made to a variety of groups and are advertised in *Currently*. A copy of the audit is posted online at www.marketing.pdx.edu/tfim.

June 2005

In response to one of the audit’s major recommendations—to clarify the image of Portland State—Lauer and Associates return to campus to conduct a “message-on-a-page” exercise to identify the themes that clarify the competitive advantage of Portland State University; to identify the facts that support the truth of those themes; to identify the symbols and design characteristics that best reinforce those themes; and to identify other phrases and descriptions that can be used as leads, descriptors, and/or tag lines. A total of 198 people (25 administrators, 57 academic faculty, 38 staff, 28 external relations staff, 23 students, and 27 friends) are invited to participate, and 85 attend the sessions. The outcomes and participants of the message-on-a-page exercise are posted online at www.marketing.pdx.edu/tfim.

September 2005

An online survey is linked to www.pdx.edu to test the themes of the message-on-a-page exercises. The survey is promoted extensively on campus and in 19 days over 3,500 people completed the survey. The words found to communicate the essence of Portland State are “urban,” “community-centered,” and “engaged.” The images most frequently named by respondents as highly associated with the University are “South Park blocks,” “sky bridges,” “Portland cityscape,” “green,” and the “streetcar.” A complete summary of the results of the survey are available at http://www.oirp.pdx.edu/res_updates/0592marketing.htm.

October 2005

> Larry Lauer and Associates returns to campus to discuss the outcome of the survey with faculty, students, alumni, and friends. (A summary of the site visit which includes an evaluation of the identity survey, a revised message-on-a-page, and an addendum to the marketing and operations audit are available at www.marketing.pdx.edu/tfim.)

- > A request-for-proposal is issued October 26, 2005, for creative services for a visual identity package that includes a logo, re-design of *PSU Magazine*, publication design, Web design, electronic documents, stationary, a visual standards guide, and guidelines for logo, color, typography, linking departments with logo, and advertising. The RFP is sent to over 40 vendors and advertised in local publications; nine responses are received.

November 2005

- > The Task Force and external relations professionals from across campus, representing every campus entity, meet to discuss the site visit summary and to approve a final message-on-a-page. The core message identified on the message-on-a-page is, “Portland State University’s intentional academic engagement and connection with the Portland urban area provides exceptional opportunities for learning, service, research, and achievement” (updated February 2006).
- > The Task Force discusses at length Portland State’s current visual identity and the visual identity of sub-brands such as Athletics and the PSU Alumni Association. The group concludes that the University would not adopt the Athletics logo, however Athletics is open to adopting a universal logo, if appropriate.
- > The representative vendor selection committee composed of 14 members holds its first meeting.

December 2005

The selection committee meets to narrow the vendor selection for interviews.

January 2006

The campus community is invited to participate in a series of open presentations by six finalists. Those in attendance provide the vendor selection committee feedback via email and at an open discussion.

February 2006

The vendor selection committee offers the contract to Sockeye Creative, Inc., a Portland-based creative firm that specializes in branding.

March 2006

- > The Task Force approves a revision to the message-on-a-page that reflects “research” as a component of Portland State’s distinctive advantage. An updated version that encompasses all changes is available on www.marketing.pdx.edu/tfim.
- > Sockeye Creative conducts a series of independent interviews with the Task Force, campus administration, and external relations professionals to garner creative inspiration. Open sessions are also held for faculty, staff, and students. Over 122 people (17 Task Force members, 47 administrators, 21 external relations professionals, 31 faculty/staff, and 8 students) participate in the interviews.

April 2006

- > Sockeye develops a creative brief for the visual identity package that serves as a “road map” to guide creative efforts. It defines the assignment, audiences, key messages, tone, brand personality, and brand values. The primary message identified is “PSU is an aspirational place of choice — a destination for opportunity.” A proprietary version of the creative brief is available online at www.marketing.pdx.edu/tfim.
- > Members of the Task Force share the creative brief with internal stakeholders who were interviewed by Sockeye in March 2006 and begin a dialog about topics addressed in the document.
- > Sockeye begins the logo design process.

May 2006

- > Three logo choices are revealed in a widely promoted two-day (May 8-9) campus gallery viewing and a one-hour “Meet the Artist” session. Task Force members are available at the gallery to answer questions. Handwritten feedback is solicited at the gallery. Based on feedback from the campus community, one logo direction is chosen for further discovery.

- > Another widely promoted two-day (May 24-25) gallery viewing staffed by Task Force members is held to reveal one logo direction. A variety of similar options are displayed as well. Feedback is solicited via email to marketing@pdx.edu. Sockeye Creative explores additional refinements to the proposed direction to address concerns noted in the campus feedback.

June 2006

- > Action-oriented subgroups of the Task Force meet to begin work on integrating brand communication in admissions/enrollment, sub-brands, and internal communications. A complete list of members and subgroup goals is available at <http://www.marketing.pdx.edu/tfim/membership.php>.
- > On June 14, both the Task Force and President Bernstine review new explorations and refinements of the proposed logo direction. The Task Force selects a final design for the logo.

June–September 2006

- > Sockeye develops the visual identity package that includes refinements of the chosen logo, three sub-brand logos, eight school/college logo treatments, re-design of *Portland State Magazine*, publication and Web design, stationery, business cards, envelopes, electronic templates for stationery, flyers, and brochures, mailing labels, an identity standards guide, guidelines for logo, color, and typography, ad design, presentation folders, note cards, electronic signature, name tags, print newsletter design, and electronic newsletter design.

August 2006

- > Communicate is sent to internal community via all faculty/staff email about the upcoming rollout.
- > University Communication launches Web site, www.pdx.edu/ucomm, with up-to-date information on the identity.

September 2006

- > Podium signs with new logo are installed throughout campus.
- > Campus street light banners with new logo are installed.
- > University Communications articulates a new approval process that requires all external communication materials be reviewed and approved prior to production.
- > Identity packets are delivered to all faculty and staff (custom envelope, intro letter, identity at a glance one-sheet, Q&A, lapel pin, and window decal).
- > Business cards are delivered to leadership.
- > University Communication staff Faculty Service Open House to lend immediate advice on using the new identity.
- > Email is sent to all faculty and staff from President Bernstine to introduce them to the new identity.
- > A story about the identity is published on www.pdx.edu.
- > Style guide, electronic letterhead, downloadable PowerPoint, flyer, and brochure templates, Q&A, and other resources added to www.pdx.edu/ucomm.
- > T-shirts are delivered to leadership, task force, and campus communicators.
- > Decals and t-shirts are handed out at student convocation.
- > Announcement about the new identity and key messages are incorporated into President Bernstine's faculty/staff convocation speech. New table drape, podium sign, and flag are utilized and lapel pins are given to attendees.
- > Top-level PSU Web site, www.pdx.edu, goes live.
- > Reminder story is run in *Currently*, PSU's weekly faculty and staff newsletter.
- > Decals are handed out at Welcome Week tables.
- > Decals and t-shirts are handed out at Party in the Park.
- > Task Force chair Cassie McVeety presents at Administrative briefings and TEAMS meeting.
- > The new *Portland State Magazine* with an article about the identity is mailed to alumni and friends.

October 2006

- > University Communications holds an identity master class for campus community; over 100 people attend.
- > New online business card and stationery ordering goes live.
- > New letterhead is delivered to University leadership.
- > University Communications begins holding daily drop-in sessions for advice and approvals.

November 2006

- > Official fonts are delivered to communication professionals throughout campus.
- > School/college logo treatments are hand delivered to each unit.
- > Discussion with each school/college about further identity training and integration begins.
- > A list-serve, communicators@lists.pdx.edu, for campus communication professionals is established.
- > Photos that support photographic identity are shot on campus.

Next steps

- > Ongoing integration and collaborate with campus community.
- > Plan spring cleaning promotion to discontinue use of old logo by summer 2007.
- > Report outcomes to campus community.
- > Address recommendations identified in Task Force's final report.

Portland State University Message-on-a-Page

The "Distinctive Advantage," outlined below, is the focused concept that differentiates Portland State from all other universities. It is a singular advantage that positions Portland State in the minds of prospects. It is not a new mission statement, rather, it is a concept that supports the University's mission statement. It is also not the actual words or phrases that would be used to communicate with external audiences. Instead, the Distinctive Advantage is a concept that will help guide and inform creative processes and University communications with all audiences.

Distinctive advantage

Portland State University's intentional academic engagement and connection with the Portland urban area provide exceptional opportunities for learning, service, research and achievement.

Defining message themes

- > Combines involvement and expertise in all things urban with a passion for cultivating all things "green."
- > Attracts creative and motivated students and faculty who teach and learn in a diverse community of all ages, nationalities and races.
- > Provides opportunity to all who demonstrate a genuine commitment to achieve.
- > Conducts research and service critical to the economic development and quality of life of the region.
- > Embodies and contributes to the vision and character that make Portland, a progressive, entrepreneurial city with growing international connections.

Visual identity

- > Official materials guidelines ... 15% should reflect the Portland State identity (word mark, logo, tag line if appropriate, official Portland State green); 85% should reflect the identity characteristics of the university, college, program, event or project.
- > Word mark/logo ... consider development of a graphic element to be used in conjunction with the university name as the official Portland State logo. Also consider how the current word mark might evolve to reflect the newly articulated brand or mutually reinforce a new graphic element.
- > Green and white remain the defining colors of the university identity.
- > Identity-reinforcing photography should appear in each publication, emphasizing diverse groups in urban and/or green settings.
- > Creativity in design must be demonstrated in order to reinforce that feature in the institution's identity.
- > Refer to Portland State University as a first reference and Portland State thereafter, rather than PSU.

Internal Launch Schedule

August 28–31, 2006

- > Communicate what to expect to internal community via all faculty/staff email
- > www.pdx.edu/ucomm live to get more information

September 4–8, 2006

- > Podium signs installed

September 11–15, 2006

- > Campus street light banners installed

September 18–22, 2006

- > Faculty arrive
- > Identity packets delivered to all faculty and staff (custom envelope, intro letter, identity at a glance one-sheet, Q&A, lapel pin, and window decal)
- > Business cards delivered to leadership
- > Staffed Faculty Service Open House to lend immediate advice on using the new identity
- > Email sent to all faculty and staff from President Bernstine to introduce them to the new identity
- > Web story on www.pdx.edu
- > Style guide, electronic letterhead, downloadable PowerPoint, flyer, and brochure templates, Q&A, and other resources added to www.pdx.edu/ucomm
- > Hand out t-shirts to leadership, task force, and campus communicators
- > Hand out decals and t-shirts at student convocation

September 25–29, 2006

- > Classes begin
- > Set-up new table drape, podium sign, and flag at faculty/staff convocation; hand out lapel pins
- > www.pdx.edu top-level site live
- > Reminder story in *Currently* (weekly faculty and staff newsletter)
- > Hand out decals at Welcome Week tables
- > Hand out decals and t-shirts at Party in the Park, an event for students

October 2–6, 2006

- > Present at standing meetings (Administrative briefings, HRASCALS, TEAMS, etc.)
- > The new *Portland State Magazine* with an article about the identity is mailed to alumni and friends

October 9–13, 2006

- > Hold identity master class for campus community
- > New online business card and stationery ordering goes live
- > Leadership letterhead delivered

October 2006–June 2007

- > Collaborate with campus community to integrate new identity into collateral
- > Hold drop-in sessions for advice and approvals in the Office of University Communication
- > Plan spring cleaning promotion to discontinue use of old logo