

Work Team 9: Enhance CLU's Reputation and Strengthen its Brand

January 21, 2012

Team Members

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Executive Summary

Charged with enhancing the University's reputation and strengthening its brand platform, Work Team 9 focused on determining the attitudes and perceptions of key constituents. The University embarked on this initiative in 2011 with insightful conversations in its Integrated Marketing Action Committee (IMAC) meetings, Enrollment Management and Marketing (EMM) Board of Regent discussions with student focus groups, and recent work to develop an authentic brand platform and promise. Members of Work Team 9 participated in all three initiatives, adding breadth and depth to the Team's strategic planning effort.

With the goal to create a brand platform and promise to best position the University within the region and establish its distinctive place within the competitive set, Work Team 9 began a discovery process to better understand CLU's internal and external brand perceptions. The team reviewed both qualitative and quantitative market research conducted by the University's Office of Educational Effectiveness and Institutional Research, EMM, as well as survey findings from Academica Group. This information ultimately drove the Team to seek further data and insights to clarify the University's brand identity.

In pursuit of greater understanding and new insights, CLU retained brand consulting firm Brand Endeavor to support the development of a brand framework and promise based on further qualitative and quantitative research. This research helped the Team further understand its competitive set and to clarify the relationship between the University's Lutheran identity and its brand positioning.

In EMM Board of Regent discussions and brand meetings with Brand Endeavor, Work Team 9 assessed CLU against the competition from the standpoint of both student recruiting and general mind-share within the Southern California market. According to survey findings and FAFSA overlap reports, CLU's competition ranges from large publics to small privates at both the undergraduate and graduate levels. Although CLU has functional and aspirational competitors, the Team agreed that the greatest opportunity to move the needle exists by aligning CLU against

2 | Work Team 9: Strategic Planning Report

the smaller privates with less defined brand promises. Because most small privates do not have strong attribute associations, CLU can assert a significant place within its competitive set by developing a compelling and relevant brand platform, owning something credible that none of its competitors have claimed.

Finally, Work Team 9 addressed a key assumption that CLU must explain and rationalize its Lutheran identity. Because it is the middle name, findings show that people who do not know the University will presume that CLU is conservative and faith exclusive, rather than open-minded and accepting of students of all religious orientations. Thus it becomes more apparent that CLU's brand platform and promise must describe an authentic core value consistent with its Lutheran identity that resonates with individuals both outside and inside the CLU community.

The proposed brand promise (to be found in Appendix D) centers on the concept that CLU provides individualized attention that helps students discover and follow their purpose, linking the promise to the Lutheran notion of vocation. This concept was favored by all audiences in the quantitative research, and was well received by campus stakeholders as truly authentic to CLU's mission and approach. Some expressed concern about whether the concept was sufficiently differentiating. After further iterations of the brand platform and promise were presented to the EMM Board of Regent Committee and Work Team 9, the group reached consensus that the original idea did work to differentiate CLU from competitors without a tradeoff in appeal or authenticity.

Process Summary

Work Team 9 began its work in the 2010-11 academic year with IMAC meetings on marketing metrics and visual identity (Appendix A). This work continued with discussions and focus groups with the EMM Board of Regents in 2011, and finally with a core project team to work with Brand Endeavor.

The Brand Endeavor core team included:

- Karin Grennan, Media Relations Manager
- Erik Hagen, Web Communications Director
- Thomas Hoener, Assistant Vice President of Enrollment Management & Marketing
- Sally Lorentson, Assistant Director of Student Life
- Margaret Miller, Assistant Director of Admission
- Kellee Roesel, Head Coach, Regals Volleyball
- Rachel Ronning-Lindgren, Director of Alumni & Parent Relations
- Jeanette Villanueva-Walker, Director of University Marketing
- Matthew Ward, Vice President of Enrollment Management & Marketing
- Stephen Wheatly, Vice President of University Advancement

Strategic planning meetings were held on August 31, 2011; September 29, 2011; and came full circle on October 28, 2011, when Work Team 9

attended the EMM Board of Regents Committee Meeting. The discussion centered on the findings of an online master brand survey, as well as the challenges and opportunities to create an authentic brand platform. While the Board of Regents Committee strongly supported the brand platform in principle and agreed that it was competitively differentiating, the group also provided suggestions that were reviewed by Work Team 9 on November 28, 2011.

Work Team 9 reviewed market research, including on-campus resources and contracted studies (see Appendix B) and surveys from the Academica Group (attached). With the results of the master brand study available, the team reviewed the findings with Brand Endeavor to refine the platform and make recommendations.

Work Team 9 Objectives

- Enhance CLU's reputation and strengthen its brand.
- Develop a more authentic brand platform and promise that positions CLU within the region and resonates with our constituents, even those unfamiliar with CLU. Ultimately, this authenticity will differentiate CLU and encapsulate the University's Lutheran identity.
- Align family brands, particularly Alumni and Athletics, with the University or master brand. Family brands address specific audiences or activities, with each family's promise in alignment (or at least not in contradiction) with the master brand.
- Utilize research to take a broad look at the overall educational marketplace in Southern California.

Brand Strategy Findings

Competitive Findings

- CLU's competition ranges from small privates to large publics
- Both insiders and outsiders compare CLU most to smaller private schools
(this is the competition for mind-share)
- With the exception of Pepperdine, the smaller privates are totally undifferentiated from a brand standpoint; among the large publics we studied, only UCSB and Cal Poly have strong brand identities
- Among outsiders, because CLU is not known for anything besides being religious, people make assumptions about the quality of education
- Defining who CLU is and what it has to offer (especially when compared with other smaller privates) will elevate perceptions of prestige and quality

Stakeholder Findings

4 | Work Team 9: Strategic Planning Report

- Students are the stakeholder group that drives the enterprise, so CLU should focus on what matters most to them
- Insiders strongly value small class sizes and individual attention
- CLU's greatest strength is providing this individual attention - not just in the classroom, but for the whole person
- CLU is committed to helping students understand what they will contribute to the world - and this idea resonated most strongly with both insider and outsider audiences in the research
- The impact of this commitment reaches beyond the student to the impact the student will make on the world. (Not serving the self but serving the community.)

University Findings

- As faith-based universities go, CLU is not particularly dogmatic or heavy-handed about religion, but because it's in the middle name, the University cannot shy away from its faith-based identity
- But even insiders can't really make sense of the University's Lutheran identity. What does it mean for the school? For the student?
- Because of this confusion, CLU spends a lot of time and energy explaining what Lutheran means; but the messages are voluminous and unfocused
- The principle of Lutheran Higher Education that resonated most in the research was vocation - helping people discover their purpose or calling
- Because this is what CLU is best at, and it's the positioning that resonated best with audiences, this should be the focus of CLU's Lutheran messaging. The rest should be support for "Discovering Purpose."

Work Team 9 Recommendations

- Embrace a new brand platform that builds prestige by explaining what CLU is really about by describing who we're for, what we do, why we do it, how we do it and who we are (Appendix C). This brand platform is centered on the idea of helping students discover and live their purpose in life (vocation,) (Appendix E).
- Establish an authentic and distinctive brand promise (Appendix D) that resonates in the marketplace. Competitive differentiation is not obtained by BEING something ONLY you can be. It is obtained by OWNING something credible that only CLU claims. This brand promise is driven by emotion (how we want our stakeholders and employees to feel), differentiation (different than promises made by competitors) and relevance (meaningful to stakeholders).
- Cultivate prestige by emphasizing high academic standards and admitting high-achieving students. Academic excellence should be addressed in brand messaging and supported with a media relations campaign about the University's accomplishments and successful alumni.
- Develop a strong and functional visual identity system for the overall University to support the new brand platform. The current logo presents functional challenges that prevent it from being

recognized in the marketplace, distinguishable as a "university," and part of a logo system to identify various University programs, centers and offices. Although CLU has had a significant billboard campaign for the past two years to enhance public awareness, the logo is nearly indistinguishable at even short distances. Additionally, the font is thin and spindly, making it difficult to read and "California Lutheran" is larger than the word "University."

- Strengthen the relationship between CLU and alumni by better communicating and delivering the benefits of the Alumni Association. This will include an emphasis on recent alumni of ADEP and Graduate Programs.
- Develop a new brand for CLU's Adult Degree Evening Program (ADEP) to better position the program for its intended audience.
- Build a new brand platform and promise for several family brands, including Alumni, ADEP, Athletics, Graduate Psychology, The College and School of Management. Rebranding is an opportunity to create a strong visual identity with a logo system, messaging platform, collateral materials and team uniforms that align with the brand.
- Clearly define CLU's footprint by shifting awareness perceptions from Ventura County, the Central Coast and select markets in Northern California.
- Further refine a competition strategy against large California public institutions.
- Develop a coherent marketing strategy for international markets.

Appendix A

IMAC Participants:

Michael Adams	Thomas Hoener	Cynthia Smith
Gerhard Apfelthaler	Kirk Lesh	Jeanette Villanueva
Kevin Baxter	Cindy Lewis	Matthew Ward
Arne Bergland	Ben Mcenroe	Bill Watkins
Lisa Buono	Stephanie Mercer	Steven Woods
Lynda Fulford	Mindy Puopolo	
Herbert Gooch	Kellee Roesel	
Karin Grennan	Rachel Ronning-	
Veronica Guerrero	Lindgren	
Erik Hagen	Melinda Roper	

Appendix B

Methodology for Brand Strategy Development (Brand Endeavor worksteps)

- Conducted 25 1-on-1 interviews with a wide range of CLU stakeholders (see list of completed interviewees).
- Reviewed an array of materials including CLU First Year Experience Findings, program marketing plans, educational effectiveness assessments, IMAC presentations, and more.
- Analyzed competitor brands - Studied regional and mind-share competitors including the University of California Santa Barbara, Cal Poly San Luis Obispo, Pepperdine University, San Diego State University, University of Redlands, Chapman University and University of La Verne.
- Fielded an online survey to examine the overall educational marketplace in Southern California. The survey addressed two target audiences:
 - Internal - CLU community of students, alumni, parents, and faculty and staff. All insiders already had some relationship with the University.
 - External - A broad unbiased perspective of residents living in Southern California representing the general population within each of the Southern California counties including: Los Angeles, Orange, San Diego, Imperial, Riverside, San Bernardino, Ventura, Kern, Santa Barbara, and San Luis Obispo. This group was supplied by an online panel provider, Research Now, and was targeted by Southern California; county of residence, ages 18-64, gender split with 50% male and 50% female, and people that had some relationship with a University (i.e., a prospective or current student, alumni, parent or employee). There were a total of 300 completes at a 60% incidence level.
 - The study was fielded May 5-18, 2011 and yielded a total of 1,570 interviews, 304 of which were purchased from the online

7 | Work Team 9: Strategic Planning Report

panel; the remaining 1,266 were generated from CLU-supplied lists (response rate = 6%).

Appendix C

Proposed Brand Promise:

WHO we're for: Open-minded students who are seeking to grow as individuals while they excel academically

WHAT we do: Provide individualized attention that helps our students pursue their passions and discover their unique purpose

WHY we do it: Because people who discover and follow their purpose can transform a community and the world

HOW we do it: GIVE one on one attention, THINK beyond the classroom, BALANCE faith and intellect

WHO we are: Dedicated, Engaged, Enlightened

Appendix D

The new California Lutheran University Brand Promise:

At California Lutheran University, helping students achieve academic excellence is only the beginning of what we do to create outstanding graduates. Our dedicated, accomplished faculty works with small classes of undergraduate and graduate students who are open-minded - about ideas, about people, and about faith - and are seeking to grow as individuals while they excel academically. Both in the classroom and outside of it, everyone at CLU is committed to helping each student pursue their passions to discover their unique purpose, and follow that purpose to transform their community and the world.

Appendix E

"Discovering Purpose" means:

Every individual is part of a community, and it should be the highest priority for that individual to discover how they can uniquely serve the community through their job, their relationships, volunteerism, and public service.