

JOHN CARROLL UNIVERSITY
Minutes of Special Faculty Forum Meeting
Thursday, December 9, 2004
Dolan Center Auditorium

Ernie Dezolt, Chair
Paul Lauritzen, Vice Chair
Yemi Akande, Secretary

Call to Order: Dr. Ernie Dezolt called the meeting to order at 3:15 p.m.

The following individuals were introduced by the Chair:

- Dr. Yemi Akande (Communications) provided a report on the work of the original marketing committee and more recently the steering committee.
- Dr. Erich Joachimsthaler, CEO of Vivaldi gave a presentation to faculty, staff and administrators.

Dr. Akande's Presentation

Dr. Akande objective was to provide an overview of the Strategic Marketing Initiatives undertaken by the university and to present the four phases of the work of the marketing committee beginning Fall '03.

Phase 1: Fall 2003: Orientation, Education and Establishing Procedure for Process

- In September 2003, the Board of Directors and administrative leaders approved a strategic plan with six goals focused on academic needs and initiatives. To this effect, the president appointed a **Committee on Marketing** to develop an integrated marketing plan that would help achieve the goal. Furthermore, the committees' charge was to "assist both the University Planning Group and the entire university community in achieving the goals in the University's strategic plan." Additionally, the committee was to achieve its' charge by defining and guiding collaborative activities that would communicate consistent and compelling messages and "images" about the university's mission, priorities, strengths, and achievements to targeted audiences.
- "The first goal - "to increase the university's visibility and recognition."

The remaining marketing goals of the University include:

- Increase applications for undergraduate admission, increase the quality and diversity of the student body, including applications from targeted areas outside Northern Ohio;

- Increase applications to graduate school programs (Greater Cleveland market);
- Engage the faculty and other members of the campus community in activities designed to “market the mission” to internal and external audiences;
- Increase revenue (gifts and grants) from alumni/ae, other benefactors, foundations, and corporations for: (1) annual support of operations via the annual fund; (2) perennial support of financial aid, programs, and faculty positions via growth in the endowment;
- Expand opportunities for students to obtain internships and employment in the region, and for faculty to collaborate with local employers and other organizations in addressing community needs through teaching, research, consultation, and institutional partnerships.

Members of the John Carroll University Committee on Marketing in the Fall of 2003 included:

- Mr. J. Gerard Sheehan, Director of Public Affairs (chairperson)
- Dr. Yemi S. Akande, Assistant Professor of Communications *
- Dr. Lauren S. Bowen, Associate Professor of Political Science *
- Mr. Thomas P. Fanning, Director of Admissions
- Ms. Janetta Hammock, Secretary to the Board of Directors & Assistant to the President
- Dr. Susan H. Higgins, Associate Professor of Marketing
- Dr. Paul R. Murphy, Professor of Marketing
- Dr. Frank J. Navratil, Dean, Boler School of Business
- Dr. Dumont Gerken Owen, Executive Director, Center for Career Services
- Dr. Edward J. Peck, Assistant Dean, Graduate School
- Dr. Jacqueline J. Schmidt, Professor of Communications
- Mr. Patrick H. Rombalski, Vice President for Student Affairs
- Dr. Tom Scheye (Consultant to the Board)

* Faculty-elected members of the committee.
(The other members were appointed by the president)

The committee focused primarily on developing a common base of understanding regarding the scope of work and on market research needs.

In respect to market research, the committee found that much data on undergraduate students already exist. However, the information, compiled by various units, has not been well communicated within the university system. Research on other constituents was sparse; graduate students and alumni/ae were notable examples. The committee decided that additional research should not be conducted before evaluating what already exists, then identifying what is needed but is not available.

Communication to the university community regarding the work of the committee had begun during phase I, via presentations to/discussions with the chairpersons of the arts and science departments, the University Council, and the development committee of the board of directors.

Phase 2: Spring '04 (Planning the Plan)

- The committee met with a representative of a local market research firm to discuss survey methods the committee may need to employ in the future. A presentation by / discussion with Robert Dykes, CEO of Triad Research, a seasoned and well respected expert on public opinion research in Ohio centered on focus groups as a research tool.
- Presentation by Administrators on information gleaned from various surveys of students.
- In February 2004, the marketing committee presented to Fr. Glynn a memo outlining the following recommended action:

Recommended Action

- In order to accomplish the six tasks in the Committee's charge, including that of defining and articulating John Carroll's "brand" or image to internal and external audiences (task #5), the committee proposed a strategic, integrated marketing plan to help achieve the goals and objectives of the university's strategic plan, which the Board of Directors is expected to approve in March. Integrated marketing communications will be a critical component of the plan.
- The integrated marketing plan would include the following elements: statement of mission and vision, overall strategy, goals and measurable objectives, brand identity and key marketing messages (the expression of mission), recommended actions, organizational structure, and a summary of resource requirements. For each recommended action, the plan would include specific action steps,

assignment of responsibilities, resource requirements, and means for measurement and evaluation.

Short-term initiatives

- The committee identified needs that should be addressed in the short term, using existing resources, while work progressed on the integrated marketing plan.
- Communicate the essence of the strategic plan to the university community to assure understanding and engender support. The strategic plan represents the foundation of the integrated marketing plan. The relationship between the two must be well understood.
- Establish consistency in the use of the university's colors, logo, logotype, and tagline in printed and electronic publications (including the Web site). This would demonstrate collaboration and progress toward the longer term goals of the integrated marketing plan.
- Begin improving the Web site: The Web Management Committee is developing a plan for the Web site, a key marketing channel. Improvement should begin this year through the collaborative efforts of the Web management and marketing committees.
- Inform the Board of Directors and other constituents about community-related activities that provide institutional visibility and recognition among benefactors, alumni/ae, and business and civic leaders. Invite leaders to the Dolan Center and other campus facilities for talks, events, and other purposes. (The development committee of the board has expressed particular interest in expanding these aspects of university marketing.)
- In March 2004, a Subcommittee, *Planning the Plan* was formed to help determine what process should lead the Marketing Committee through the planning phase. This subcommittee consisted of Drs. Navratil, Owens, Akande and Sheehan. At this meeting Frank Navratil proposed using the AACSB accreditation process to lead the Marketing Committee through the planning process.
- In the initial meetings of the original marketing committee, members struggled with fundamental issues of identity, vision and how best to engage the University community at large. The committee sought guidance regarding fundamental questions in respect to the university's strategic plan and its foundational relationship to the integrated marketing plan. The over-riding question related to the mission and vision statements of the university, "who we are" and "where we are headed."
- The Marketing committee requested clarification from Fr. Glynn and Dr. LaGuardia to help understand the university's perspective. The committee felt it

was important to help assure what the committee would be recommending in respect to brand image, marketing messages, and other aspects of the marketing plan were consistent with the Presidents' vision for the future of the university. Fr. Glynn in responding to Committee's request referred back to the work of the University Planning Group where there has emerged the recognizable need for John Carroll, i.e., a recognizable need for faculty, administration and staff to better understand and better articulate our mission in strategic terms as the University's brand for the purposes of marketing. This process for better understanding and better articulating the mission in strategic terms must be a collegial one because marketing, if it is to achieve the strategic goals, must engage a significant share of the John Carroll community.

- Why? The strategic plan proceeds from the vision of John Carroll being "recognized as among the best Catholic universities" and the last of our six strategic goals that follow logically from this vision is "to increase the university's visibility and recognition." Efforts to increase the university's visibility and recognition obviously call for marketing but the marketing, needs to be an integrated and collegial strategic effort if we are to achieve our strategic goals.
- Dr. LaGuardia reaffirmed that the committee should focus on long term, strategic marketing as envisioned by the committee and not on admission goals for the next year. His comments, coupled with the discussion that ensued, clarified a number of issues and substantially advanced the work of the committee.

Phase 3: Summer 2004(Developed a coordinated and integrated marketing plan)

- Developed a coordinated marketing communications plan that supports the marketing objectives of major units during the current year (9/04-5/05)
- Developed an integrated marketing plan that supports marketing goals for the longer term
- Established a model for collaborative planning to achieve marketing goals
- **Outcome of Summer work plan**
- Reviewed of college taglines by the board's executive committee (written synopsis distributed). In summary, "Come Ready to Learn, Leave Ready to Lead" was not favorably viewed. Nevertheless, the Marketing Committee decided to continue testing this and other taglines to obtain perspectives from other constituent groups.

- Interviewed First year students / parents during orientation
 - Interviewed Current students engaged in orientation
 - Interviewed Arts & Sciences department chairpersons
 - Interviewed a variety of Summer session students in and alumni/ae during reunion weekend.
- **Decision was also made to seek external support from a marketing firm, since** many of the committee members were not marketing experts and had other responsibilities that limited the time they could devote to this task.
 - Committee members decided to explore hiring a marketing firm. Some local and national candidates were identified and Request for Proposals (RFPs) was sent to 6 firms.

Phase 4 (Fall 2004): Recommendation and Implementation of the Plan

- On August 5, 2004 – Proposals were reviewed by marketing committee meeting, after which a decision was made to invite two or three firms to campus in September. This recommendation was forwarded to the President and Vice Presidents.
- The President and Vice Presidents supported the recommendations. Three firms were invited back to campus. However, one firm withdrew prior to the presentation.
- Three members of the Board of Directors were appointed by the chairman, Charles “Bud” Koch and president to serve on the marketing committee – Patrick Auletta, Jack Kahl, Charles Rini, and Daniel Sussen.
- On Friday, September 17, from 10:15 to 11:45 a.m. Vivaldi Partners, Erich Joachimsthaler, Ph.D., Founder and George Steinway made their presentation.
- Following the two presentations, the Marketing committee’s recommendation to the president and vice presidents was to retain Vivaldi Partners, a New York City-based marketing strategy company, to provide consulting services related to the development of an integrated marketing plan for the university. More importantly, Vivaldi Partners was selected because they are knowledgeable about marketing initiatives and have brought a different and unique perspective on marketing to the JCU.
- On Oct. 11th the Fr. Glynn and the vice presidents approved the recommendation to retain Vivaldi Partners.
- October 18, 2004 Father Glynn made a formal announcement on retaining Vivaldi Partners. He also appointed a small steering committee to guide the project and work with the consultants on the integrated marketing project."

Current Status

- On October 27, 2004, members of the steering committee were constituted.
- The steering committee members are as follows: Fr. Tim Shannon, Fr. Howard Gray, Mr. Patrick Rombalski, Mr. John Gladstone, Mr. Michael Merriman, JCU Board of Directors, Chair, Development Committee, Dr. Mary Beadle, Mr. Tom Fulton, Dr. Akande, and Sue Buhling (Administrative Assistant to Fr. Tim Shannon).
- The charge of the committee is to guide the work of the consultant, encourage participation and support by members of the university community and provide oversight to assure project is completed on time and within budget.
- On November 2, 2004, members of the steering committee spoke to Erich Joachimsthaler and George Steinway via conference call to clarify certain matters related to the phases of the contract.
- November 8, 2004, members of steering committee met with representatives from Vivaldi Partners to discuss the term of engagement and action plan. The current length of engagement with Vivaldi Partners is for three months concluding on February 17th, 2005.
- November 15, 2004, members of the steering committee met with members of the original marketing committee on how to work collaboratively.
- November 18, 2004, Fr. Shannon (Vice President of Development and Alumni Relations) addressed faculty forum. Fr. Shannon noted that this is a discovery process that is highly collaborative that would include focus groups and phone interview with diverse constituents. He also mentioned that the Marketing Steering Committee has met with members of the original Marketing Committee to interface and help with their expertise.
- December 9, 2004 - The collaborative process continues.

Vivaldi partners has already began work on campus and have interviewed through focus groups or one on one interviews a number of faculty and staff on issue related to the marketing initiative.

Following Dr. Akande's presentation, Dr. Erich Joachimsthaler, CEO Vivaldi gave a presentation outlining the process of engagement at JCU. Vivaldi's objective is to drive tangible results through a new strategic positioning of the institution. Additionally, the focus is on shared thinking of what JCU stands for and what it means to diverse constituents. The whole point is to create positioning and identity that will achieve relevance with students, alumni and parents. He also presented an overview of previous

clients including: Higher education institutions such as Lehigh University and commercial corporations such as Master card.

Dr. Joachmisthaler noted that Vivaldi's approach is collaborative and their task is to understand what is relevant and compelling.

Following Dr. Joachmisthaler's presentation, there was a question and answer session.

The meeting was adjourned at 5:15 p.m.

Minutes prepared by Yemi S. Akande, Secretary Faculty Forum