

Marketing and Communications Policy Q&A

What defines a M&C Activity?

The process of communicating to internal and external stakeholders, including community relations, government and legislative leaders, alumni, donors, students, administrators, faculty and staff, and the general public. An M & C activity entails the process of managing the marketing messages, disciplines and vehicles that are used to support the University's brands, products and services. The process includes planning, developing, executing, and measuring campaigns/programs that are designed to achieve a specific market objective with a target audience. These activities may be executed using multiple communication vehicles and are frequently conducted over a discrete timeframe. (IU Benchmarking Processes definitions 2010)

What is the difference between university-wide, campus, school and unit M&C strategies activities?

A **university-wide** M&C strategies activity could include, as examples, adherence to the Integrated Image guidelines and Visual Identity <http://www.visualidentity.iu.edu/>, university-wide use of a branding tag line such as formerly used "Quality Education. Lifetime Opportunities.", use of forthcoming branding message "What Matters. Where It Matters", etc. The recent IUONLINE strategy for example has multiple marketing and communication elements to it promoting a single image for any IU online programs being offered.

A **campus** M&C strategies activity could include, as examples, IUPUI's "Where IMPACT is Made" campaign; IU East's "IU focused on you" campaign; IU Kokomo's "Small Campus. Big Opportunities." tagline, etc. In addition, each campus has a strategy for increasing enrollment, retention and graduation as well as the numerous programs each campus specifically offers.

A **school** M & C strategies activity could include, as examples, promotions for IU Kelley School of Business Online MBA: Kelley Direct Programs; IU Jacobs School of Music Summer Festival or Opera & Ballet Festival, and IU School of Education's IUconnectED program, etc.

A **unit** M & C strategies activity could include, as examples, Recreational Sports "Step into Fitness" campaigns to increase physical activity through walking, Center for Postsecondary Research projects such as: National Survey of Student Engagement, etc.

What non-academic units must comply with the policy?

All non-academic units must comply with the policy. Non-academic units must evaluate the option of "contracting" with IU Communications for all their M&C needs. Where they have justifiable needs for their own staff for M&C activities, they must consult with IU Communications before recruiting and hiring such staff. They should nevertheless still utilize IU Communications services wherever possible and rigorously avoid the duplication of these services.

What is the process for non-academic units to “contract” with IU Communications?

Initial contact should be initiated through either Eleanor Berman, Senior Marketing Project Manager, Client Relations and Account Services for IU Communications bermanel@iu.edu or 812-855-0840 or Meghan O’Connor, Assistant Director, Client Relations and Account Services for IU Communications mloconno@iu.edu or 317-274-7710. At that time, either Eleanor or Meghan can put together a quote for you on the marketing and communication deliverables you are seeking. In many instances, your unit may be needing something that there is no charge to obtain. Items such as news releases, PR assistance etc. do not have a charge associated to them.

What are the requirements that each unit must turn in for the Budget Conference?

A document titled “IU Strategic Marketing Plan Template” was first introduced during the 2012-13 budget planning cycle. This document, or a document similar to it should be completed by all campuses, schools, departments/units, centers that engage in M&C activities at the commence of each annual budget cycle. To request a copy of this document, please contact Troy Brown tdbrown@iu.edu or 317-274-7711.

In addition, all budgets should contain a breakdown and explanation for M&C activities into one of the following three categories:

Direct Expenditures, Indirect Expenditures or Non Linked Expenditures.

What is a direct expenditure?

For purposes of the M&C policy statement, a “direct” expenditure is one directly linked to revenue generation (e.g. student recruitment, paying patrons in the case of IU Auditorium, Jacobs School of Music, IU Theatre & Drama, IMU/Biddle Continuation Center hotel guests, etc.)

Print – could be print advertising or brochures, flyers, postcards, etc. (includes: creative/design, writing/editing and production costs)

Mailing costs for print pieces that are targeted for revenue generating purposes.

Billboards (creative/design and production and placement costs)

Radio (creative/narrative, production and placement costs)

Television (creative/visual and/or narrative or text, editing and production and placement costs)

Travel to high schools, college fairs, open houses, Red Carpet days, etc. to market the University to prospective students. This would also include direct costs associated with events/activities that bring targeted prospective students to one of the University’s campuses, schools, degree programs, etc.

On-line advertising (web banners, etc.)

Telemarketing (for purposes of recruitment/revenue generation)

E-distribution costs for communications/messages that are targeted for revenue generating purposes.

Website development and maintenance costs for sites/pages that are targeted for revenue generating purposes.

Metrics & Measurement (evaluation) tools directly related to evaluation of revenue generating activities.

Signs and banners (including digital signage)

What is an indirect expenditure?

For purposes of the M&C policy statement, an “indirect” expenditure is one that would still be considered M&C activity, but is not directly linked to revenue generation (e.g. promoting the quality of a program or unit externally). An example might include featuring on a print ad or website a recent ranking such as through US News and World Report, Fiske Guide to Colleges, or Forbes “America’s Top Colleges”. The ranking likely would be only indirectly responsible for influencing a prospective student’s decision on Indiana University. It’s a recognition that is not in Indiana University’s control. Another example might be a campaign such as “Street Smart”, an IU Bloomington student safety campaign. Although the “Street Smart” campaign addresses serious student safety issues, it’s likely not a deal breaker nor is it intended to have significant influence in the decision making process of the student or their parents. Rather “Street Smart” is a “communications” awareness message to the students and their families after the decision making process has passed.

External rankings (that IU has no control over such as US News & World Report, Fiske, Forbes, large variety of other program or individual faculty award recognitions, etc.)

Promotion of the quality of a specific program/unit within a school , or in some cases even a school on a specific campus.

What is a non-linked expenditure?

Maintenance of a web page that would not in any way influence revenue generation. Indiana University at Indiana Black Expo or Indiana University at the Indiana State Fair web pages might be feasible examples. In both of these illustrations, Indiana University is involved with these events for public relations purposes and not specifically for recruitment purposes. It would be extremely difficult to evaluate whether IU’s presence at Indiana Black Expo or Indiana State Fair would result in a student making the choice to be admitted to one of the IU campuses.

What must be listed when identifying staff at 75% or more in M&C activities?

Any M&C staff devoting a minimum of 75% of their time to such activities as generally represented herein: facilitating groups of prospective students, parents, high school counselors, or other educational representatives participating in organized campus tours or large visit days. This would also include staff time spent in assisting with the selection of creative, media vehicles/avenues and markets to be

considered and ultimately purchased. This would include decisions relevant to any or all of the above mentioned M&C activities. It would also include development of methods to quantify, communicate and enhance the value/success of leads generated. Tracking the effectiveness of various high school visits, college fairs, and other recruiting activities based on their yield of applicants, admits, and enrolled students to determine future involvement in that particular activity.

Who qualifies as an M&C consultant?

Writers/editors

News editor

Communications Specialist

Communications Manager

Graphic designers/graphic artists

Art Directors

Interactive Art Directors

Web architects/Web designers

Web production coordinator – in terms of providing metrics/evaluation tools

Web content specialist

News and/or Media specialists

Media buyers

Advertising, PR and Design Consultants

Special Projects/Special Events Coordinator (especially if projects/events coordinated are intended to recruit students, patrons, visitors, etc.)

Marketing Research positions

Visual and Audio Services personnel: photographers, producers, visual communications specialists, etc.

Social Media Specialist

In some instances, Information Technology staff (for example, if primary responsibility is to send targeted e-mails to prospective students, potential patrons, etc.) Title might include List manager/data analyst.

Emerging Media Developer

Interactive Technologies

New Media Developer

Where do freelance designers and writers fit in?

Under the general term of “consultant” for purposes of this policy.

Where do web designers and developers fit in?

Under the general term of “consultant” for purposes of this policy.

How do we find out what M&C consultants are already engaged with the university?

IU Purchasing is currently in the process of working with IU Communications to identify and provide this list of M&C consultants. Once available, it will be listed on the Purchasing and IU Communications websites.

What’s the process for getting M&C personnel hired within my unit?

Please plan to have this discussion before you go to the trouble of writing a position description. When contacting please provide the following:

What the position is you are requesting.

Why the work planned for this position cannot be performed by contracting either with IU Communications or an outside vendor.

If further clarification is needed, you will be notified. Once you receive an answer on the position, IU Communications will also send notification to the HR department that the position has either been approved or denied.

What is the process for getting approval on an M&C activity?

IU Purchasing is working closely with IU Communications to channel all purchase requisitions being initiated for M&C activities through IU Communications for approval. Once a PO or Requisition number is assigned, Purchasing sends the request to the mcreq@iu.edu email address and copies the requesting unit on the email. A request is then evaluated and additional information may be needed. The requesting unit will be copied on all email transactions. Once a decision is made, a response will be sent back to Purchasing with a copy of the email going to the requesting unit. The process can take up to a week so please plan your requests in a timely manner to allow plenty of time to meet your deadlines.

What is the process for getting approval on hiring an M&C consultant?

First, touch base with either Eleanor Berman, Senior Marketing Project Manager, Client Relations and Account Services for IU Communications bermanel@iu.edu or 812-855-0840 or Meghan O’Connor,

Assistant Director, Client Relations and Account Services for IU Communications mloconno@iu.edu or 317-274-7710 to see if IU Communications might be able to adequately fulfill your need(s).

If not convinced that IU Communications can take care of your need within the desired timeframe, then follow the same process as a standard M&C Activity request as identified in the question above.

What is the process for getting a design approved after I've been approved to do the M&C activity?

Design approval must also be channeled through IU Communications. Once the M&C activity has been approved by Purchasing, proceed with your artwork and before you are ready to print send your final artwork back to purchasing and they will route through the appropriate people to get approval.

What is the process for getting signage approved?

Please use this link <https://signage.iu.edu/> to prepare a request for getting banners and signs approved. The form is automatically routed to the IU Facilities office for location approval and then to IU Communications for artwork/design approval.

If I'm a center or unit under a school do I need to let the school know what I'm doing?

Yes. As stated under items 4 and/or 5 of the Marketing and Communication Policy.

If I'm a school do I need to let the campus know what our marketing plans are before I execute them?

Yes. As stated under item 3 of the Marketing and Communication Policy.

If you have additional questions regarding this policy, you may contact Troy Brown at tdbrown@iu.edu or 317-274-7711.