



Just do it.

Yes, that's Nike's iconic advertising slogan, but it's also the advice marketing consultant Kathi Swanson gives her community college clients about assessing their marketing activities and determining their return on investment.

"Measure something and it will become easier for you," says Swanson, president of CLARUS Corporation, a Nebraska-based firm that works exclusively with community colleges. "Start with one or two [metrics] and then go from there."

In presentations Swanson shows marketers that adding a couple of measurement columns to a marketing plan spreadsheet can be a simple way to begin tracking key metrics. While what professionals choose to measure will differ for each institution and project, Swanson says most marketers should build measurements for the web, social media, email, advertising, public relations, and admissions into their metrics dashboards. And thanks to the web, there's been a revolution in the availability, accessibility, and number of metrics and measurement tools to track these areas, making measurement not just possible but "phenomenal," Swanson says.

"I used to say that marketing was an art and a science; it's a science when it works and an art when it doesn't," says Ron Gossen, senior associate vice chancellor and chief marketing officer at the University of Missouri–St. Louis. "Now it's all science. The numbers that I build into my marketing plan today, five years ago I wouldn't have had the slightest idea what they meant. The whole thing has changed. We live on metrics—we live on *converted* metrics."

STEPHEN WEBSTER FOR CASE

Proving YOUR SUCCESS

By THERESA WALKER

Communications and marketing professionals are increasingly tying their work to the bottom line. Are you measuring what matters?

Like many marketers, Gossen checks his dashboard daily, especially as the calendar nears UMSL Day, the university's spring and fall open house events for prospective students. Those who attend an UMSL Day are much more likely to matriculate, thus adding another conversion.

But in late February 2013, with the spring UMSL Day just a week away, Gossen was getting nervous about the daily registration numbers, which were about 50 percent lower than at the same time in 2012. He decided to increase the radio ad buy. The next day, the line on the registration chart began a steep ascent. The result: Gossen and his team broke their 2012 record.

"We measure, deploy, and readjust our resources to a big degree on where things are at the time," Gossen says. "If you don't use metrics to make your decisions, then you're going to make decisions on things that you don't know."

MARKET FORCES

The movement toward measurement is driven not just by new tools but new realities: a schizophrenic economy, tight budgets (both governmental and institutional), changing student demographics, contracting enrollment, increased competition for students, rising tuition, and escalating student debt. Add in the pressure to prove the value of a college degree, and institutional leaders and stakeholders want more accountability and transparency.

"For many years, marketing has always been sort of

hammered on: 'Well, how do I know if spending those dollars is really working?'" Swanson says. "There's an internal push to really understand what's working and to look at it from a return on investment standpoint."

In this changing landscape, professionals are increasingly tying the value of their work to the bottom line and their outcomes to the institution's strategic goals.

"Marketing is an investment, and like any investment, institutions have the right to expect a reasonable return," says Robert M. Moore, president and CEO of the marketing communications firm Lipman Hearne and co-author of *Net Proceeds: Increased Revenue from Enrollment and Advancement Guaranteed!*, which will be published by CASE this summer.

Moore co-wrote the book, with Lipman Hearne Chairman Tom Abrahamson, to help marketers develop strategies that best serve their institution and demonstrate their contribution to the bottom line. Too many institutions still have a tendency to view marketing as nonessential—a place to cut during tough budgetary times, Moore says. Demonstrating ROI shows leaders that marketing has a direct effect on the institution's health and vitality.

"I almost sense that there's a groundswell," says Terry Flannery, vice president of communication at American University in Washington, D.C. "All of us feel the need to be accountable for proving that we are being good stewards of these [marketing] investments ... by proving that there is a bottom line to them."

Through her work with CASE's Commission on Communications and Marketing, Flannery is a primary player in helping the profession determine and define some reasonable approaches to marketing ROI. During the past year, a handful of commission members used and refined a template Flannery developed to find the marketing cost per student at their own institutions.

"There was a shared sentiment that if we didn't define this issue, it would be done for us—and in a way that we didn't think was appropriate," Flannery says. "Even if they're relative measures, they are a more refined, analytical way of understanding the best use of marketing resources."

To prove that metrics could be used effectively in a higher education environment, the commission chose the strategic measure of marketing cost per student because the resulting data can clearly and quickly show marketing's implications across the institution. That's particularly true on campuses with more centralized operations, where a chief marketing officer often has easier access to marketing expenditures and enrollment information.

"When people in leadership positions can actually

see the relative value of the marketing investment, it puts it in much more reasonable terms," Flannery says. Investing \$1 million in marketing may sound like a large and potentially prohibitive expense, but

presenting the same investment as, for example, a cost of less than \$100 per student—plus the resulting revenue—could alter the decision-making process.

The commission's next step is to establish some guidance and possibly a set of tools to help marketers measure ROI at their own institutions. Since any results will hold meaning only within each institution, the project's value comes from the possibility that

professionals will be able to measure the effectiveness of their marketing efforts from year to year and make better decisions about acquiring and stewarding their resources.

Of course, getting data on marketing costs is easier on some campuses than others due to decentralization, the degree of marketing integration, and departments' willingness to share data. If you work on a large, decentralized campus, prepare for some political conversations when negotiating access to the information you need. Properly framing the request is essential,

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in short

PUTTING DATA IN THE DRIVER'S SEAT. Want to learn more about marketing ROI? Secure your spot at the Conference for Community College Advancement Oct. 2–4 in San Diego, where Kathi Swanson will co-present the session "Data-Driven Marketing: How to Measure Your ROMI (Return on Marketing Investment)." Swanson, president of the community college marketing firm CLARUS Corporation, will outline and define the key marketing metrics every community college marketing director should be using to measure ROMI, explore the obstacles to data-driven marketing and suggest ways to overcome them, and demonstrate how to communicate ROMI to internal and external stakeholders. Learn more and register at www.case.org/ccca13.

PRINCIPLE LESSONS. After implementing the Barcelona Principles (see sidebar on p. 28), Joe Brennan, associate vice president of university communications at New York's University at Buffalo, came up with five takeaways for getting started: 1) Focus on the big picture. Help staff understand the benefits of measurement, such as improved effectiveness, greater respect, and better resources. 2) Build consensus. Your effort should emerge from a thoughtful dialogue between management and staff. 3) Create some quick victories to prove to staff and colleagues that measurement works. 4) Phase in measurement. Start by measuring activities, then effects, and finally, impact on organizational goals. 5) Don't make metrics punitive; use the results to celebrate success. "Make it a chance to slap high-fives with everyone," he says.

DASHBOARDS DELIVER. A growing number of advancement professionals say they struggle to measure social media's ROI, according to the fourth annual CASE/Huron Education/mStoner survey of more than 1,000 CASE members about their institutions' use of social media. In this year's survey, 38 percent of respondents came to that conclusion, compared with 33 percent in 2012 and 32 percent in 2011. But perhaps most interesting is the link between using metrics and finding success. "We see a relationship where those who say they were most successful also talk about a dashboard of metrics that they look at weekly or monthly," mStoner president Michael Stoner reported in his survey findings. Review the survey results at bit.ly/SMCsurvey13; read Stoner's presentation at bit.ly/SMCsurveyreport13.

WHAT'S THE STORY BEHIND YOUR DATA? Tracking metrics and measuring goals produce lots of data points, but what do they mean? Nothing without people who can interpret the information in ways that help organizations make smart decisions, argues the *Harvard Business Review* blog article "A Data Scientist's Real Job: Storytelling" (bit.ly/HBRdatastorytelling). Whether choosing the most effective subject line for an email or determining a campaign's purpose, organizations need to "humanize" the data by turning raw numbers into a story about their performance. Finding a visual way to present your data can help your message. For a look at how Procter & Gamble has made data visualization a priority, read the *HBR* blog article "How P&G Presents Data to Decision-Makers" (bit.ly/HBR-PandG).

Flannery says, particularly since units may see it as a threat to their resources.

At AU, Flannery framed it as a way to look at the data together. “If we determined that anything was or wasn’t working, the agreement was that funds would be reallocated to something *within the unit* that may work better,” she says.

EMBRACING THE “M” WORD

Politics and the fear of losing resources aside, ROI can be daunting for another reason: math.

“If you’re not familiar with statistics and simple quantitative methods, you might have some wariness,” Flannery says. But ROI at least involves simple

math, as Moore writes in *Net Proceeds*: “It’s no more complicated than addition and subtraction, multiplication and division, and a rudimentary calculation of percentages.”

Math is also a path to the upper level of leadership, according to Claire Brown, director of student recruitment and admissions at the University of Liverpool in the U.K.

“Marketing has much more of a seat at the top table now in universities,” she says. “And it’s a seat that’s talking a lot more about strategy, about understanding markets, dynamics, competitors, positioning, and value propositions. These are conversations that weren’t being had at the level that they are now.”

Swanson agrees, citing a marketing director who believed that a New England institution’s expensive printed student recruitment publication wasn’t effective. She couldn’t cut it, however, because campus leaders liked it. After attaching some metrics and

tracking the piece for two years, she calculated its ROI and showed that it wasn’t working as well as some of the campus’s other marketing activities. Leaders eliminated the publication and reinvested the funds elsewhere in the marketing budget.

“When you can show return on investment, management appreciates that,” Swanson says. “Marketing is sometimes viewed as real fuzzy, especially when we get to longer-term measures like branding and awareness, so being able to put a dollar amount on it gives a marketing director incredible power in the organization.”

BACKING NEW BENCHMARKS

In communications, ROI is a tricky subject since, strictly speaking, it’s an accounting term. When ROI is used in communications, professionals are usually referring to something more oblique, such as the reputational value that communications activities generate.

“We don’t calculate the value of a story,” says Camille LePre, AU’s assistant vice president for communications and media. “We haven’t done that, and we don’t do that. You really can’t get an ROI because what’s the value?”

Measuring communications outcomes by trying to assign a dollar figure to media coverage hearkens back to the use of advertising value equivalency—what media placements would cost if they were purchased as advertisements. Although AVEs are a discredited PR metric because they don’t account for the content or tone of the media coverage, they are still used in some circles (although not always willingly). Instead, the discussion has moved away from counting news clips, AVEs, and other kinds of audience multipliers in favor of outcome measures that demonstrate how communications drives business performance—or in higher education’s case, how communications helps an institution achieve its strategic goals.

That measurement standard is known as the Barcelona Principles, a set of seven guidelines that establish global benchmarks for PR measurement. (See sidebar at left.) If you haven’t heard of them yet, don’t worry. Two-thirds of PR professionals are unfamiliar with the Barcelona Principles, according to a March 2013 survey of more than 1,400 communicators—including in higher education—by Ragan Communications and NASDAQ OMX Corporate Solutions.

But awareness is growing. As associate vice president of university communications and an adjunct member of the communications faculty at New York’s University at Buffalo, Joe Brennan is well-versed in PR measurement. After a few changes in campus leadership, a period of reduced budgets, and more attention being paid to assessment and accountability, Brennan wanted to ensure that his staff was investing its energy and resources in ways that produce the best results. He put the Barcelona Principles into practice to determine what was working, to help his unit and staff become more efficient and effective, and to relate their outcomes to UB’s strategic goals.

Unlike development colleagues who can report on the millions of dollars they raise, “I think we’re at risk of being seen as overhead because our work is not as tangible,” Brennan says. “I can’t say that a portion of those millions was related to the donors’ perception of the institution as effective, exciting, and worthy of investment, but I know I contributed to some degree. Well, I don’t know it, I believe it. I’d like to move from believing to knowing.”

UB is implementing the principles in three phases, the first of which includes determining what to measure and how. By the end of the year, Brennan wants metrics in place that track and relate his division’s activities to institutional outcomes.

“Just talking about it, just deciding what to measure is a moment when you can be better focused on your strategy,” Brennan says. “You can make sure your tactics are aligned with your strategies and that all of it is working together to achieve goals.”

In deciding what to measure, Brennan and his team focused on 10 goals and outcomes for 2012, which are published on the division’s website (bit.ly/UBmeasurements) in an effort to be transparent. Each of the areas contained different variables that could have been tracked, but not everything you can measure really matters, he says.

One focus is increasing national news coverage by

placing more stories that highlight UB’s strategic strengths. In re-evaluating the university’s media strategy, Brennan’s team also adjusted its objectives for success in local news, deciding to aim for only front-page coverage of institutional priorities.

Brennan and his team settled on metrics that would offer the most useful information for the time, effort, and expense involved in gathering the

data. But getting there wasn’t painless. The measurement discussions created anxiety among staff members, who worried that the results would be used to evaluate their performance.

Brennan publicly pledged that this wouldn’t happen. He also reminded his staff members that backing up their efforts with data would help tell the department’s story more effectively—and better show the impact of their work to senior leaders.

After attending a PR conference a couple of years ago, AU’s LePre discovered that she had been applying the Barcelona Principles without realizing it. Her unit’s outcomes are directly tied to two transformational goals in the university’s strategic plan, and the metrics her team uses help evaluate its progress toward achieving those goals.

“We should all be asking ourselves: What are we trying to prove, what are we trying to show, and what are we trying to justify,” LePre says. “You need to work backward from the outcome you want and ask yourself what that will look like and what you will need to do to get there.”

LePre’s team reviews not only the quantity of media placements but their quality, looking at the types of media outlets, their reputation, and the audiences they reach; overall quality of the stories; how much of an article is focused on the institution; and the favorability of the portrayal. Staff members also examine the total number of placements and compare how coverage has increased or decreased year to year. Her staff targets specific media outlets for placements, and the team sets goals for achieving a certain percentage of stories focused on institutional

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Measurement Matters

The Barcelona Principles (bit.ly/Barcelona-principles) were established in 2010 by a partnership of five major international public relations industry associations to establish unified benchmarks for PR measurement.

- Goal setting and measurement are fundamentally important.
- Measuring the effect on outcomes is preferred to measuring outputs.
- The effect on business results can and should be measured where possible.
- Media measurement requires quantity and quality.
- Advertising value equivalents are not the value of public relations.
- Social media can and should be measured.
- Transparency and replicability are paramount to sound measurement.

priorities, such as faculty research and students' academic success as well as coverage for institutional programs, offices, schools, and divisions.

"Goal setting depends on where you are today," LePre says, "and where you want to be tomorrow."

SHARE WHAT YOU KNOW

Want to demonstrate the value of your work *and* gain campus allies? Reporting outcomes can play a useful and strategic role in developing partnerships. Brennan sends twice-yearly reports to UB's school and college deans recapping the media coverage their units received during the spring and fall semesters.

"It shows that we're working for them, and it creates an opportunity to sit down a couple of times a year to discuss how we can work together," Brennan says. "If we're doing things that aren't getting good results and really aren't a good use of our time, I can have a conversation with a dean or a vice president

and show them that if we put our energy in certain places, we'll get better outcomes."

These meetings have led not only to more strategic discussions about tactics, time, and resources but also increased campus collaborations as deans and faculty members contact him with newsworthy ideas, updates, and information.

"It's already started to change how we're seen," Brennan says. "And more importantly, I think it's improved our effectiveness at serving the institution."

Florida State University has seen similar results with its media highlight reports, says Jeanette De Diemar, assistant vice president for university relations and director of university communications. The reports, which include social media activity, go to internal colleagues and partners each month and to the board each quarter.

As FSU moved to an integrated marketing and communications model, De Diemar believed that

showing the ROI of communications and social media was important since the university had committed staff and budget to these areas. Similarly, De Diemar and her staff have worked to shift the culture toward showing their results.

"Before we might have forgotten to talk about the ROI or the impact or the result of something that we did with a dean, a department chair, or researcher," she says.

Now, De Diemar ensures that partners and colleagues see their contributions to the university, such as a faculty member's participation in a media pitch or quote in a story. This also demonstrates the role that communications has played in helping raise the profile of a particular college or school. At board meetings, trustees see how the communications division has increased awareness of the university and strengthened appreciation for its work, which is essentially the overarching goal of most higher

education communications and marketing efforts.

This type of reporting also illustrates the continuous nature of measurement. You can choose a place to stop and take a snapshot, but the activities, projects, and goals will continue, grow, transform, and evolve.

"What are you trying to achieve?" De Diemar asks. "Without that starting point, it doesn't matter what you're measuring." ■

Theresa Walker is a CURRENTS senior editor.

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