INTRODUCTION
Dear Colleagues:

Penn State has an excellent reputation as a top, global, public research university that is Pennsylvania’s sole land-grant institution. Nevertheless, the true character, quality, and excellence of Penn State is underappreciated and not fully reflected in its excellent rankings.

This includes:

1. The unique nature of our twenty-four campus educational model, plus World Campus
2. The breadth and depth of our $800 million+ research engine
3. The collegiality, character, and selflessness of our community of 700,000+ Penn Staters
4. The land-grant character that underpins our commitment to serve society and provide for social and economic mobility
5. Our role as an engine for quality of life in Pennsylvania

These characteristics are not as well known as they could be, emanating in part from underinvestment in proactive media and marketing. This was exacerbated by a characteristic of humility, which, while admirable, has inhibited more robust communications.

There is, however, a Yiddish expression that characterizes our view of communications:

“TOO HUMBLE IS HALF PROUD.”

We have a magnificent story to tell. We can tell it with taste, creativity, and some humility. But tell it, we will.

Sincerely,

Lawrence Lokman
Vice President
Strategic Communications
OVERVIEW
**MISSION**
Promote Penn State as a top-tier university, strengthening its reputation in regional, national, and international spheres of influence and support, in ways that serve University recruitment, resource, and leadership goals

**GOALS & OBJECTIVES**
- Strengthen the University’s reputation for academic, research, and service excellence
- Protect and advance the University’s reputation for integrity
- Nurture pride and attachment to the University
- Build understanding and support for the University’s needs and priorities
- Grow the value of a Penn State degree

**ASSISTED OUTCOMES**
- Recruitment of the best students, faculty, and staff
- Expanded volunteer, donor, and advocacy support
- Enhanced reputation for excellence
- Increased value of degree
- Increased support for leadership priorities
GUIDING PRINCIPLES

Strategic Communications

- Operates with candor, integrity, and respect
- Forms partnerships to leverage expertise and resources
- Strives for excellence and creativity
- Embraces diversity in all aspects of our organization and work
- Solicits stakeholder and advisory input
- Anticipates and solves problems
- Focuses on opportunities
APPROACH
COMMUNICATIONS IMPACT MATRIX

INITIATE
- Reputation Campaigns
- Enrollment Campaigns
- Opportunistic Campaigns

ALIGN
- Leadership Initiatives
- University Strategic Plan
- Fundraising Campaign
- Campuses, Colleges, Units

BUILD
- KPIs
- Research & Analytics
- Brand/Visual Foundation
- Crisis Protocols

TEST, MEASURE, & REFINE
AUDIENCES & PARTNERSHIPS
### BASE

**INTERNAL COMMUNITY**  
President, Provost, Business & Finance, Student Affairs, Academic Senate, committed alumni and donors

**COMMITTED ALUMNI AND DONORS**  
Alumni Association, Office of University Development, Intercollegiate Athletics (ICA)

**KEY LEADERSHIP**  
Board of Trustees, President’s Council (PC), Academic Leadership Council (ALC), University Faculty Senate, volunteer boards

### HIGH YIELD

**PROSPECTIVE DONORS, FOUNDATIONS, AND GOVERNMENT FUNDING AGENCIES**  
Office of University Development, OVPR, Government and Community Relations

**GREATER SUPPORT FROM YOUNG ALUMNI AND MILLENNIALS**  
Alumni Association, Office of University Development

### PROSPECTS

**STUDENTS AND THEIR FAMILIES**  
Admissions, the Commonwealth, World Campus, ICA, ALC

**FACULTY**  
Office of Human Resources (OHR), Office of the Vice President for Research (OVPR), Academic Senate, ALC

**STAFF**  
OHR, University Staff Advisory Council (USAC)

### CRITICAL INFLUENCERS

**INFLUENTIAL MEDIA**  
Top 80 worldwide outlets

**OTHER LEADING ACADEMIC INSTITUTIONS**  
OVPR

**BRAND AMBASSADORS**  
Office of University Development, Alumni Association

**COMMONWEALTH VOTERS AND OPINION LEADERS**  
Government and Community Relations, Alumni Association
STRATEGIES & FOCUS AREAS
INTEGRATION MODEL

BRAND IDENTITY CONTENT STORYTELLING
ORGANIZATIONAL IMPERATIVES

ALIGN PEOPLE AND RESOURCES FOR SUSTAINABLE IMPACT

• Align competencies and skills across core areas under a new brand and identity and content and storytelling continuum

• Maintain an active professional development program that emphasizes skills, initiative, problem solving, communications, project management, and collaboration

• Build division capacity to meet goals through a University-wide communications optimization analysis and three-part strategy that:
  1. Eliminates waste and redundancy where possible (e.g., more efficient media buying)
  2. Deploys resources for maximum effect
  3. Involves strategic investments to drive sustainability across core functions

• Align with strategic plan and fundraising campaign thematic priorities, including health; arts and culture; open doors; digital innovation; engagement; and food, water, and energy security
ORGANIZATIONAL IMPERATIVES

BUILD DIVERSITY AND INCLUSION INTO ALL ASPECTS OF DIVISION OPERATIONS

• Broaden recruitment channels to help establish diverse pools of candidates

• Incorporate diversity and inclusion into employee goal setting and evaluation

• Maintain division-wide diversity and inclusion education that helps reinforce awareness of language and connectivity with diverse audiences (e.g., Lunch and Learn sessions and meetings with diverse student organizations, faculty, and staff)

• Incorporate diversity and inclusion in all communications channels and initiatives (e.g., photo library, social media, advertising)

• Prioritize communications support for equity and inclusion initiatives, such as the “Addressing Bias” toolkit
CREATE AND MAINTAIN STEADY BRAND PRESENCE

DRIVE CONSISTENT PRESENCE ACROSS ALL CHANNELS AND AUDIENCES

• Develop proactive, integrated campaigns that break through the clutter and drive reputation

• Test and refine core brand messaging that reaches and influences key target audiences

• Build unique content through active storytelling for a steady drumbeat of compelling Penn State stories to core audiences through all available channels

• Develop and manage standards for all aspect of Penn State’s visual and licensing brand identity, including marks, cross-platform design standards, toolkits for graphic and video elements, and licensing products and approvals

• Inculcate brand messaging and identity across the University through socialization, training, and partnership with communicators in other units
DRIVE QUALITY OF UNIVERSITY-WIDE COMMUNICATIONS

ESTABLISH DIVISION AS A CRITICAL PARTNER AND RESOURCE

• Serve as counselor and partner to vital units whose work impacts reputation (PC, Alumni Association, Office of University Development, leadership councils, etc.)

• Engage key stakeholders around priority topics and develop directional strategies (e.g., partnership with Development and Research on Invent Penn State naming and identity standards)

• Establish standards, training, and resources to help develop strong and consistent reputation (e.g., crisis communications team protocols and training)

• Maintain active community building and professional development for all communications professionals (e.g., ice cream socials, All-Comm Conference)

• Establish and maintain active media training for senior leadership University-wide

• Provide counsel and partner with communicators on priority opportunities (e.g., support for National Science Foundation-funded projects; support for the Advocacy Network launch; and guidance for Teaching and Learning with Technology, Consortium to Combat Substance Abuse, and the Institutes of Energy and the Environment)
Goals:
- To build brand consistency across Penn State via unified storytelling framework and creative assets
- To provide turnkey tools that unify brand look and feel while maintaining flexibility for units to display their unique characteristics

Audience:
- Communications professionals across Penn State

Timing:
- An evergreen resource launched in March 2018; as of March 2019, held workshops involving more than 120 communicators

Features:
- Brand positioning, tag-line, tone, and voice
- Brand pillars and storytelling framework
- Color palettes and fonts
- Graphic elements
EXTEND BRAND PRESENCE THROUGH THE OFFICE OF LICENSING PROGRAMS

PRESERVE AND PROMOTE PENN STATE’S BRAND IDENTITY THROUGH THE USE OF THE INSTITUTION’S INDICIA AND TRADEMARKS

• Oversee use of marks on all officially licensed collegiate merchandise

• Employ an omni-channel strategy to meet consumers where they are—in store, e-commerce, digital, mobile, and social

• Partner with manufacturers, retailers, and suppliers with best practices methodologies in the areas of product quality control, labor-rights compliance, and environmental stewardship

• Continually expand labor-rights knowledge to make sure products are made under fair and humane working conditions

• Develop new product colors, lines, and labels such as “For the Glory” to enhance and promote tradition through product and brand extensions

[Note: Penn State’s licensing program was ranked the fourth top-selling university among all IMG Collegiate Licensing Partner Schools in fiscal year 2017-18. The program ranked in the top ten nationally for the same period. This royalty ranking represents the largest royalty collection in Penn State’s licensing program history, exhibiting an increase of more than 20 percent over the prior fiscal year.]
AUGMENT INTERNAL COMMUNICATIONS

BUILD INTERNAL COMMUNICATIONS PROGRAM THAT POSITIONS LEADERSHIP AS A TRUSTED RESOURCE FOR CRITICAL FACULTY AND STAFF ISSUES

• Analyze all communications vehicles (e.g., Penn State Today and Headlines) to determine optimal frequency and content

• Support key University issues with strategic approaches that raise awareness and create understanding, buy-in, and support (e.g., help Penn State IT with communications strategy for Reimagining IT initiative)

• Use production studio and impending broadcast studio to increase visual communications (e.g., engaging videos, infographics, and animation)

• Conduct regular surveys of key audiences on content and calls-to-action (e.g., Penn State Today reader surveys)
Goal:
- To create a comprehensive crisis management program throughout the entire University. This includes:
  - Establishing communications readiness at University Park and Commonwealth campuses
  - Conducting environmental monitoring
  - Preparing contingency materials
  - Expanding vigilance—particularly via social media “listening” and rapid response protocols
  - Activating a core issues team to set goals and strategy, monitor and solicit feedback, and measure and drive improvement

Timing:
- Complete key program support by 2019 (based on the third-party audit in 2016)
- Ongoing development of scenarios, and review of issues outcomes

Results:
- Established a Crisis Communications Team (CCT) that has been effective in managing multiple issues, such as the Greek-life crisis
- Completed University Park campus playbook and campus-specific playbooks (in 2018)
- Began creating emergency scenario plans (hate scenario, active assailant; more to be created in 2019)
- Completed first round of message and media training with lead campus communicators; began late 2018 scenario review/media training with all chancellors (to be completed in 2019)
RAISE NATIONAL AND GLOBAL MEDIA PROFILE

DEVELOP A PROACTIVE MEDIA PROGRAM THAT BUILDS ON CURRENT EFFORTS TO ACHIEVE MEASURABLE INCREASES IN COVERAGE OF THE UNIVERSITY BY INFLUENTIAL MEDIA

- Put in place technology tools and infrastructure that allow for a proactive media program in the digital era; this includes a broadcast studio and a gold-standard online newsroom
- Target and increase coverage of Penn State in top 80 worldwide outlets, including key media markets in Pennsylvania, the Northeast, and internationally
- Focus media outreach around trends/topics of interest to the media and public, where Penn State has key experts (update expert database); includes social listening and message dissemination
- Develop media partnerships (e.g., The Conversation) and content for digital era that includes greater use of infographics and video
- Develop key metrics and analysis of successes, and identify opportunities for future paid amplification and strong top-tier stories
- Use key distribution methods to disseminate media releases (Eureka Alert, Futurity, etc.)
- Align programs with the University’s strategic plan and fundraising campaign priorities
DEVELOP STRATEGIC ADVERTISING CAMPAIGNS TO SUPPORT UNIVERSITY ENROLLMENT GOALS

ORGANIZE AND ACTIVATE AROUND THE RIGHT MESSAGE THROUGH THE RIGHT CHANNELS AT THE RIGHT TIME TO DELIVER POTENTIAL STUDENTS INTO THE ENROLLMENT FUNNEL

• Separate enrollment from image communications and leverage the unique attributes of Commonwealth campuses within overall brand

• Leverage the targeting and negotiating capabilities of media partners to execute efficient campaigns that bring student prospects into the funnel and support Penn State Undergraduate Admissions with their efforts to convert prospects into enrollments [Note: This effort has saved significant resources that were redirected to support other reputation-building efforts]

• Maximize digital channels for improved targeting, flexibility, optimization, and analytics

• Identify and analyze targeted audiences to determine message segmentation and aid efforts to attract new enrollment targets (e.g., adult learner pilot project)

• Optimize web experience(s), in conjunction with Admissions and campus partners, to deliver on user expectations and ultimately help convert suspects to prospects
SPOTLIGHT: 2017–19 ENROLLMENT CAMPAIGNS

Goals:
• To generate awareness, drive visits, and, ultimately, increase applications to our Commonwealth campuses
• Advertising to support the enrollment cycle for eight months per year with four distinct, but interrelated, windows of activity with corresponding goals:
  o Penn State Days—to drive attendance to fall open house(s) at each campus
  o Fall enrollment—to increase applications
  o Spring enrollment—to drive yield and campus visits
  o Spend a Summer Day—to increase campus visits

Strategy:
• Shifted goals from awareness only to awareness and conversion; added a focus on channels and messaging that drives students and parents to VISIT or APPLY
• Grounded the campaign in measurement, gaining the ability to identify which tactics/messages perform best at different points in the “admissions funnel”
• Moved from a fixed-media model to one that is constantly optimized; added the ability to shift budget across channels based on performance
• Aligned with key partners: UAO and Commonwealth campuses

Creative:
• Developed fresh, contemporary creative that breaks through the clutter to appeal to the 16- to 18-year-old demographic
• Used message testing to identify and refine messaging with highest performance and then repeated that messaging in other prospect touchpoints (e.g., email)
• Created a bank of campus-specific creative assets, including television commercials, social videos, customized videos, and animated display ads

Year-over-Year Outcomes from Advertising:
• 109% increase in application completes
• 65% increase in visit sign-ups
• 58% increase in impressions
• 40% increase in video completions
PROTECT REPUTATION FOR INTEGRITY

CREATE AND MAINTAIN A FIRST-CLASS CRISIS AND ISSUES MANAGEMENT PROGRAM THAT ANTICIPATES ISSUES, ALIGN MESSAGES WITH UNIVERSITY VALUES, GATHER STAKEHOLDER INPUT, AND INTEGRATE COMMONWEALTH CAMPUSES

- Inform decision making and policy setting, drive messaging around topics/issues that could impact reputation, and work to implement “early warning” processes to surface issues
- Implement recommendations from University-wide gap analysis to create a best-practices crisis communications playbook and scenario templates, including social media and the formation of a formal crisis communications team
- Maintain an open and productive relationship with legal counsel that involves active information sharing, early communications planning, and collaboration
- Assume an aggressive posture in communicating University decision making on sensitive issues—do not allow Penn State to be defined by others in an information vacuum, and center communications on values
- Maintain an active training and emergency communications program
- Communicate actively with key Board of Trustee leaders (e.g., CORE calls)
- Coordinate closely with the Office of Emergency Management and other leaders
- Collaborate appropriately with key groups (OHR, ICA, etc.) to determine needs and synergies
RAISE LEADERSHIP PROFILE

BRAND MAJOR LEADERSHIP INITIATIVES AND GROW ACTIVE LEADERSHIP COMMUNICATIONS PRESENCE

• Maintain and grow marketing and media support for Presidential initiatives (e.g., Invent Penn State, Access and Affordability)

• Conduct targeted media and opinion leader outreach in support of President and Provost priorities and vision for Penn State (e.g., 1:1 with key top-tier reporters in New York City, Washington, D.C., and Pennsylvania; editorial board visits)

• Create opportunities for the President to communicate his positions on major issues impacting the University so they are known and understood by the media and other key audiences (e.g., Digging Deeper blog, op-eds)
MEASUREMENT AND EVALUATION

EMPLOY QUALITATIVE AND QUANTITATIVE MEASUREMENT AND EVALUATION TECHNIQUES TO BENCHMARK AND TRACK PROGRESS

• Benchmarking and tracking surveys that measure impact on KPIs that include reputation for quality and audience inclination to give, volunteer, or advocate

• Quarterly proactive updates for President’s Council, Academic Leadership Council, and Board of Trustees

• Social listening that tracks reach, frequency, content, and presence in key outlets and focus areas

• Digital analytics across all platforms and channels to guide continuous and real-time improvements

• Informal feedback (e.g., word of mouth, support, and interest from partners)
SPOTLIGHT: FALL 2017-SPRING 2018 PENNSYLVANIA IMPACT CAMPAIGN

Purpose:
• To leverage the new brand positioning through an omni-channel advertising and public relations campaign that builds understanding of Penn State’s excellence and mission to serve society

Goals:
• Enhance voter and alumni appreciation for Penn State’s role in improving quality of life on issues they care about
• Drive likelihood for University advocacy and support

Creative:
• Create and disseminate a mix of earned media and paid TV, radio, print, digital, and social media stories about Penn State’s impact as told through the voices of students and faculty

Results:
• Researchers compared those who reported seeing the campaign to those who had not been exposed, and found:
  o 20% of Pennsylvania voters (1.7 million) and 28% of alumni saw the campaign
  o The campaign significantly improved favorability and uniqueness scores
  o Target audiences who saw the campaign reported significantly higher interest in donating, advocating, volunteering, recommending a student, and hiring a graduate
KEY INITIATIVES
<table>
<thead>
<tr>
<th>Key Initiatives</th>
<th>FISCAL 2018—19</th>
<th>FISCAL 2019—20</th>
<th>FISCAL 2020—21</th>
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<tbody>
<tr>
<td><strong>Brand Campaign</strong></td>
<td>Develop and launch brand campaign 2.0; track progress</td>
<td>Develop and launch brand campaign 3.0; track progress</td>
<td>Develop and launch brand campaign 4.0; track progress</td>
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<tr>
<td><strong>Access and Affordability Brand Strategy</strong></td>
<td>Create name/brand strategy for access and affordability presidential initiative</td>
<td>Create brand strategy for Engage Penn State presidential initiative</td>
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<td><strong>Student Brand Storytelling</strong></td>
<td>Student classes produce brand storytelling content</td>
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<td><strong>Brand Storytelling Workshops</strong></td>
<td>Conduct brand storytelling workshops for communicators University-wide</td>
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<td><strong>Intercollegiate Athletics Brand Storytelling</strong></td>
<td>Incorporate Athletics into branded storytelling</td>
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<td><strong>Optimization Study</strong></td>
<td>Conduct University-wide communications optimization study</td>
<td>Socialize and implement communications optimization study recommendations</td>
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<tr>
<td><strong>Crisis and Issues Training</strong></td>
<td>Conduct crisis and issues training with campus communicators and chancellors, and continue scenario plans</td>
<td>Complete crisis playbook scenarios</td>
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<td><strong>ScienceWriters2019 Conference</strong></td>
<td>Continue planning and host the National Association of Science Writers Conference (ScienceWriters2019)</td>
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<td><strong>CEG-CICEP Presidential Positioning</strong></td>
<td>CEG-CICEP leadership positioning for President Barron</td>
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<td><strong>Penn State Site Redesign and Launch</strong></td>
<td>Redesign and launch psu.edu, news.psu.edu, and media experts database</td>
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<td><strong>Intercampus Commencement Committee</strong></td>
<td>Create an intercampus commencement committee</td>
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<td><strong>OGCR Advocacy Network</strong></td>
<td>Partner with OGCR to launch advocacy network</td>
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<td><strong>Global Media Strategy</strong></td>
<td>Develop and launch global media strategy</td>
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<td><strong>Broadcast Studio</strong></td>
<td>Launch broadcast studio in Wartell Building</td>
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<td><strong>Enrollment Campaign</strong></td>
<td>Develop new creative for enrollment campaign</td>
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<td><strong>Commonwealth Campus Videos</strong></td>
<td>Create Commonwealth campus videos based on Penn State Behrend template</td>
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<td><strong>Value of Penn State Degree Communications Strategy</strong></td>
<td>Develop and launch a communications strategy to reach local, regional, and national employers to underscore the value of a Penn State degree</td>
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<td><strong>Brand Ambassadors Initiative</strong></td>
<td>Develop and launch Brand Ambassadors initiative</td>
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<td><strong>One Penn State</strong></td>
<td>Develop One Penn State enrollment model</td>
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_Last Updated:_ August 2019