

**Evaluating the Logo, Mark, and
Graphic Identity for
Case Western Reserve University**

SUBMITTED BY

LIPMAN HEARNE August 2006

Our Understanding

Case Western Reserve is one of the nation's leading universities, ranked 37th in *U.S. News & World Report* among national institutions for its outstanding programs in the sciences, engineering, computer science, management, as well as the liberal arts.

It is fitting, then, that Case Western Reserve offer a visual identity that represents its national stature as well as thoughtfully imparting what makes its an outstanding university. The current concern that the visual identity and word mark does neither – and may in fact be alienating an important alumni segment – leads to the current request for an evaluation of both elements of the identity. We are pleased to respond with a work plan that combines both our understanding of identity design and the critical role brand plays in marketing communications.

In addition, this proposal also responds with a suggested option for Case Western Reserve to consider a more foundational review of its overall brand in the marketplace. While a better understanding of visual identity is helpful, it does not address the more fundamental issues of how to Case Western should talk about itself in a consistent, powerful, and motivating way to its all key audiences – prospective students, alumni, prospective faculty, current faculty, community, business leaders, research finders, and donors. Such an exploration is more likely to address the underlying concerns about how the University can best align itself internally to build pride among all stakeholders and enhance its marketplace position.

About Lipman Hearne

Helping institutions build powerful brands is Lipman Hearne's core business. We are the nation's leading full-service marketing and communications firm dedicated exclusively to helping nonprofit institutions build their reputations, raise funds, recruit students, broaden their influence, and accomplish their highest aspirations.

With a deep bench of seasoned professionals from the worlds of education, consumer marketing, advertising, and philanthropy, we are uniquely able to identify and tell the story of our clients in a way that excites and motivates their audiences.

Our Approach

No two institutions – their challenges or opportunities – are the same. We assemble the appropriate combination of people, skills, and resources to address each client's needs. Regardless of the scale of the assignment, we recognize that a clear understanding of the institution, its constituents, and its market position is essential to achieving successful marketing outcomes. We employ an empirical approach to developing strategic marketing solutions and constituent-centered communications. Our award-winning creative services team translates these solutions to print and interactive collateral that brings the brand promise to life.

Our Services

We offer a full array of integrated marketing services to help institutions establish and achieve identity, positioning, visibility, recruitment, retention, and fundraising goals:

Branding

Our team of strategists, designers, and writers develop striking and memorable branding campaigns that capture the essence of an institution and set it apart from the crowd. With insight gained from internal interviews, competitive analysis, and comprehensive market research, we develop positioning strategies, visual and verbal identities, and integrated marketing programs for both large and small institutions.

Marketing Communications

Through sophisticated marketing tactics and materials—including all manner of print pieces, direct mail, advertising, web pages and videos—our marketing teams strategically target communications to build a more valuable brand and get measurable results in the marketplace.

Enrollment Marketing

Through sophisticated marketing research and plans – and the application of breakthrough communication tools including interactive, direct mail, advertising, and viral marketing – our experienced marketing team helps clients build a more valuable brand in the marketplace and achieve their enrollment goals.

Public Relations and Media Relations

To raise awareness and build support, we provide a full array of public relations services, ranging from broad-based public education campaigns to targeted story placements in print and broadcast media to media tours and editorial briefings that put our clients' issues on the desks of key journalists and editors across the country.

Interactive Marketing

Lipman Hearne's interactive marketing specialists design, program, and build websites and electronic communications programs, including email and newsletter outreach that enable organizations to augment the impact of print and other electronic communications.

Philanthropic Communications

For capital campaigns, annual funds, and planned giving efforts, we develop messages, visual identities, and supporting materials and activities that inspire generosity among donors and prospects.

Our Clients

Our clients range from world-renowned institutions to regional and local organizations within the worlds of education, arts and culture, philanthropy, healthcare, public policy, professional associations, social services, and advocacy. Some 65 percent of our clients are educational institutions, including these prominent institutions:

- Yale School of Management
- Rutgers University
- Lehigh University
- Purdue University
- Fletcher School of Law and Diplomacy (Tufts University)
- The University of Chicago

In addition, we created strategic fundraising communications that helped:

- Duke University raise \$2.36 billion
- Brown University frame and launch a \$1+ billion campaign

- **The University of North Carolina at Chapel Hill solidify its brand and develop messages and materials in support of a \$1+ billion campaign**
- **The University of Miami develop an array of campaign materials (print, interactive, and video) to articulate the rationale for a \$1.2 billion campaign**
- **The University of Illinois develop key branding and campaign messages for an anticipated \$2 billion campaign**

Our Approach to Branding

The objective of brand marketing is to move beyond statements about product characteristics (“we are student focused”) and generalizations that have no genuine differentiating value (“we represent excellence”) to a unique and relevant value proposition. This positioning is based on a thorough analysis of the competitive environment and is reflected through compelling messages, words, and images that mirror the values of the target audience and genuinely communicate their experiences.

In our view, branding is more than a graphic design assignment—the creation of a logo, a tagline, or the visual integration of a diverse array of marketing materials. It is also more than a creative advertising or public relations campaign. These things are all essential, but at its core, branding is about product differentiation and marketing strategy, executed in a manner that truly sets the institution apart in the marketplace.

With a proven methodology base on working with hundreds of the nation’s leading colleges, universities and other nonprofits, we would work with the XXX to develop a compelling brand.

Phase One: Market Understanding and Analysis

Perhaps the single most important dimension of successful brand building is completing a comprehensive analysis of the total environment in which the brand competes. Our team of brand consultants gains a clear understanding of the challenges (and opportunities) facing an institution

through a review of planning documents and other relevant materials and through in-depth interviews with organizational leaders and staff.

Defining and studying the organization's competitive environment analytically is also a critical aspect of this phase. Our goal is to understand and compare all of the dimensions that determine the institution's competitive environment—operational and marketing strategy, product positioning, messaging, etc.—so that we can clearly see where opportunities exist to stand apart from others in the marketplace.

This fact-finding and competitive analysis is synthesized in a report that identifies specific priorities, objectives, and expectations that are to drive the work.

Phase Two: Constituent Research

Once we have identified key audiences the institution would like to influence and motivate, we conduct highly focused market research. Our research ensures that an institutional picture emerges that is not only based on self-perception, but one based on how the external realities of the marketplace. A critical aspect of brand building is performing objective “outside/in” research that allows us to see the institution through the eyes of the marketplace, rather than making marketing decisions based on projecting internal institutional mindsets and beliefs that are seldom wholly accurate.

Phase Three: Brand Positioning Platform & Development

At this stage, we make inferences drawn from the fact finding and market research to determine the best marketing strategies to realize specific brand objectives. This involves, among other things, a determination of the

core strengths of the institution that can be taken to the level of a brand value proposition that will resonate with target markets, how the institution should be positioned in the marketplace against competitors, and the basis on which the institution plans to compete. The plan aims to deliver the right brand experience to the right audience at the right time for the right reasons.

We then create a detailed marketing plan that specifies all tactics to be used as part of the brand campaign. This plan is based on goals, optimized budgets, and opportunities to leverage the institution's own internal marketing capabilities. Tactics for each priority audience may include publications, interactive, public affairs/media relations, advertising, special events, studies/special reports, and "viral" or guerilla marketing tactics.

For each tactic, and for the marketing strategy generally, we develop metrics, such as pre-, during-, and post-campaign awareness, web traffic, press clippings, direct-mail responses, event attendance, phone queries, advertising rating points, funds raised, and competitive share of voice that are relevant to the initiative.

Once a plan is in place, we develop the creative strategies, language, and messages that vividly communicate the client's core value proposition to the marketplace. What is learned through the analytical stage is turned into key messages, graphic identity, advertisements, web executions and other images that demonstrate the creative concept, product positioning, and brand personality. Concept testing is conducted to ensure that the messages and creative executions we develop resonate with the marketplace.

Lipman Hearne History

Headquartered in Chicago, Lipman Hearne can trace its roots to the founding of Lipman Design in 1966 and of Hearne Communications in 1969. The two companies worked closely together on behalf of a number of large clients, including the University of Chicago, the Institute of European Studies, and the John D. and Catherine T. MacArthur Foundation. In 1988 the companies merged, creating Lipman Hearne, Inc.

From the start, the focus of Lipman Hearne's business has been the nonprofit sector, and the decision was made to continue that focus as a corporate value. In 1994 the company leadership decided to enhance the firm's services for colleges and universities by adding the capacity to do enrollment management. Finally, with the opening of our Washington, D.C., office in 2001, the firm expanded its client base to include key national and international nonprofit institutions. We now have a total of 65 employees in the two offices, including seven partners.

Selected Client List

COLLEGES AND UNIVERSITIES

Ball State University, Muncie, Indiana
Baylor University, Waco, Texas
Duke University, Durham, North Carolina
Lehigh University, Bethlehem, Pennsylvania
Northern Arizona University, Flagstaff, Arizona
Northern Illinois University, Dekalb, Illinois
Northwestern University, Evanston, Illinois
Ohio University, Athens, Ohio
Purdue University, West Lafayette, Indiana
Rutgers University, New Brunswick, New Jersey
Trinity University, San Antonio, Texas
Tufts University, Medford, Massachusetts
University of California, Irvine, California
University of Central Florida, Orlando, Florida
University of Chicago, Chicago, Illinois
University of Cincinnati, Cincinnati, Ohio
University of Colorado, Denver, Colorado
University of Illinois-Chicago, Chicago, Illinois
University of Illinois-Urbana-Champaign, Champaign, Illinois
University of North Carolina, Chapel Hill, North Carolina
University of Miami, Coral Gables, Florida
University of Missouri-Columbia, Columbia, Missouri
Vanderbilt University, Nashville, Tennessee

GRADUATE AND PROFESSIONAL PROGRAMS

Baylor University, Hankamer School of Business, Waco, Texas
Claremont Graduate School, Claremont, California
Duke University, School of Law, Durham, North Carolina
Indiana University School of Medicine, Indianapolis, Indiana
Indiana University, Jacobs School of Music, Bloomington, Indiana
Kennedy School of Government, Harvard University, Cambridge, Massachusetts
Medill School of Journalism, Northwestern University, Evanston, Illinois
Northwestern University, School of Law, Evanston, Illinois
Stanford University, School of Law, Palo Alto, California
Tufts University, Fletcher School of Law and Diplomacy, Medford, Massachusetts
University of Chicago, Graduate School of Business, Chicago, Illinois
University of Colorado, School of Business and Administration, Denver, Colorado
University of Maryland, School of Law, College Park, Maryland
University of Michigan, School of Information, Ann Arbor, Michigan
Valparaiso University, School of Law, Valparaiso, Indiana
Yale School of Management, New Haven, Connecticut

Section 1 The Work Plan

PHASE I: INTAKE

Kickoff meeting/on-campus backgrounding

To ensure that our work meets your needs and objectives, we would begin our partnership by meeting with the Case Western project planning group. Two senior Lipman Hearne staff would travel to campus to review objectives for the work, clarify the timeline and budget, define roles and responsibilities, and review how best to communicate with you. We also would want to review the history of how the current Case visual identity and word mark was developed, the intended audiences, its strategic intent and purpose, and how the mark is now being used.

We then recommend a series of in-depth individual interviews and/or group discussions with administration and staff representing key stakeholder groups, including alumni affairs, academic leadership, admissions, marketing and communications, and students.

Our goal for these interviews and discussion groups would be to develop a baseline understanding of:

- What is their current perception the identities, its introduction, implementation, as well as its strengths and weaknesses?
- Do their constituents find it acceptable? Why or why not?
- What has been its effect on philanthropy, development, student recruiting, and national recognition?

- What are Case Western's current strategic marketing and communications goals? Is the visual identity and word mark successfully advancing those goals? Why or why not?
- How does the Case Western leadership hope to see the institution positioned relative to key audiences and competitors? What role does visual identity play?

Documentation review & materials assessment

In advance of the planning meeting, we would begin to review and analyze the Case Western branding study, alumni survey research, other relevant research documents, the current visual identity guidelines, as well as institutional strategic planning documents. We would also review a representative sample of communications and marketing materials that use the visual identity and word mark, both print and electronic, to assess overall intent, audience appropriateness, messaging, branding and positioning effectiveness, style, tone, and design.

PHASE II: ASSESSMENT

The need to express brand "promise" through a strong visual identity is critical to building and maintaining a memorable brand. We would assess the Case logo in terms of its success in meeting executional and strategic standards.

Expert evaluation

Lipman Hearne has created logos for several major universities, including Ohio University, University of North Carolina, and Rutgers. For this engagement, our designers would evaluate the current Case Western logo on executional dimensions, including:

- **Craft:** Was the identity rendered applying the highest standards of design? How were the standards applied?
- **Function:** What brand taxonomy currently exists at Case Western Reserve University? Does the identity display the appropriate brand taxonomy?
- **Useability:** Are there clear guidelines for the consistent use of the mark? Are the guidelines used appropriately?

Constituent research

We recognize that Case Western Reserve must reach and engage a variety of constituents – among them, alumni from Case Institute of Technology as well as Western Reserve University, prospective students, regional community and corporate leaders, faculty as well as current students and their parents.

For purposes of research, however, we have focused our recommendations on those audiences typically viewed as critical to higher education brand success: prospective students, alumni, and corporate and community leaders. This research would be designed to provide input to inform our strategic evaluation of the identity.

Either through focus groups or a web-based survey, we would ask groups to evaluate the mark on the basis of:

- **Naming:** Is the mark appropriate based on recognition and distinctiveness?
- **Symbolism:** Does the mark support the Case Western Reserve brand position?

- **Personality:** Does the mark support the brand characteristics of Case Western Reserve?

PHASE III: REPORT

Based on our review of the documentation, our visit to campus, our expert assessment, and results from our research, we would prepare a report that addresses the strengths and weaknesses of the current logo. This would include an assessment of its development, the assumptions behind its development, its introduction, current use, and the effectiveness in advancing the overall brand. Our analysis would include our assessment of the challenges and opportunities that exist to continue use of the current identity and a recommendation for next steps.

The Lipman Hearne project team would visit campus for one day to present the research. In addition to highlighting issues of importance to Case Western Reserve, the presentation would provide a means to engage in constructive conversation about brand image, brand strategy and marketing, and the competitive environment.

Timetable

<u>WORK PHASE</u>	<u>COMPLETION DATE</u>
Phase I: Intake	2-4 weeks
Phase II: Assessment	4-8 weeks
Phase III: Report	2-3 weeks
 Option: Brand Development (*depends on research currently available)	 8-20 weeks*