

Appendices

A. Branding process

In the Fall of 2003, MSU took the first steps in developing an integrated marketing plan to better coordinate our communication efforts and strengthen the identity of Montana State University. A consultant conducted a review of current communications activities, the resources being invested in those activities and how effective those efforts have been. The analysis and recommendations were presented to the University's Executive Council, and several of the recommendations were implemented immediately, including a reorganization of the Communications Services department to position this unit to better serve the campus and coordinate our communication efforts. The department was renamed the Office of Communications and Public Affairs and is comprised of four departments: The MSU News Service, Publications and Graphics, Web Communications, and University Marketing.

We then proceeded with a campus-wide effort that defined our strengths and values as an institution, and how we differentiate ourselves from other universities.

We also chose to name ourselves Montana State University (rather than Montana State University-Bozeman) in order to better recognize our standing as flagship campus of the MSU system, and—after an extensive research process—we officially adopted the tagline Mountains and Minds.

Next, we developed our creative style, including a new logo, brand extensions, university colors, typography, extended color palette, and creative styles for photography and publications.

Then, we developed this toolkit resource and worked with the university community to train constituents in how to use the key messages and creative styles.

Finally, we will evaluate our efforts—the timeliness and appropriateness of the key messages, the efficacy of the creative styles, and the support of the university community in using and championing these efforts.

Our desire is that all these efforts combined will further increase the visibility and reputation of Montana State University.

B. Participants

Montana State University's Marketing Advisory Council membership as of December 2006 is:

CHAIR: Cathy Conover - Director of Communications and Public Affairs

Susan Capalbo - Director of Special Projects, Research Office

Jeff Conger - Faculty, School of Art

Peter Fields - Director of Athletics

Mark Frisby - MSU Bookstore

Heidi Gagnon - Administrative Officer, Office of VP Admin and Finance

Jayne Groseth - Executive Director, Alumni Association

Moss Hartt - Director, MSU Web Communications

Jenn Jensco - CEPAC

Julie Kipfer - Director of University Marketing

Mike Pasquale - ASMSU

Jim Rimpau - Executive Director of Planning and Analysis

Ronda Russell - Director of Admissions

Stacey Scott - Professional Council

Doug Steele - Vice Provost and Director of Extension

Connie Talbott - President and CEO, MSU Foundation

Shannon Taylor - Faculty Council

Annette Trinity-Stevens, News Director

Greg Young - Vice Provost, Undergraduate Education

The Logo Steering Committee (August 2004-May 2005) consisted of:

CHAIR: Suzi Taylor, Director of Publications and Graphics

- Jeffrey Conger, Faculty, School of Art
- Cathy Conover, Director, Office of Communications and Public Affairs
- Kristen Drumheller, Art Director
- Peter Fields, Athletic Director
- Jaynee Groseth, Alumni Director
- Sarah Haggart, Student, Graphic Design
- Moss Hartt, Director of Web Marketing
- Julie Kipfer, University Marketing Director
- Ronda Russell, Director of Admissions
- Shannon Taylor, Faculty Council Representative, College of Business
- Valerie Tutvedt, ASMSU representative; Student, Political Science

Consultants included:

- Educational Marketing Group, Denver, Colo.
- Esser Design, Phoenix, Ariz.

Both consultants were chosen by a Request for Proposal process through MSU's Purchasing Office.

C. Summary of research

Educational Marketing Group analyzed MSU’s communications efforts in the fall of 2003. In general, EMG found a lack of consistent image and strategic communications, despite many institutional strengths and emerging opportunities. EMG noted that MSU’s communications and marketing staff is significantly smaller than peer land-grant universities.

EMG noted the following challenges and recommended actions.

Challenge	Recommendation	Action
No unique and compelling brand identity	Develop core values, unique campus experience and superior quality attributes.	<ul style="list-style-type: none"> • Developed brand positioning statement with brand promise and key strengths • Developed brand personality
Lack of coherent design identity	Create a consistent visual and messaging identity. Visual ID should include signature and mark, colors, design elements, typography, and branded photography; editorial content outlines, unit brochures, Web navigation and content; advertising; proof points and audience-specific messages.	<ul style="list-style-type: none"> • Developed a new university logo with brand extensions for colleges and agencies • Developed font suggestions and extended color palette • Created and distributed Web templates and publications guidelines • Created online proof points database
Highly decentralized organizational model	Develop brand architecture to manage how MSU’s various entities represent themselves in the marketplace.	Developed brand architecture. Designated brand manager and instituted graphic review committee and exemption process.
Scattered communications structure	Reorganize central services; rename department; unify budget with appropriate institutional funding for advertising, operating, staff and marketing.	Reorganized and renamed Office of Communications and Public Affairs. Instituted dotted-line reporting and regular meetings with college communications officers.
Few resources available for marketing	Move into more aggressive regional and national focus. Increase institutional marketing budget to 1-1.2 percent.	Plan to launch comprehensive ad campaign in 2007.
Lack of campus-wide strategic objectives	Develop a five-year strategic vision plan. Set measurable institutional performance objectives.	Five-year plan is written. Strategic objectives are being determined. Integrated marketing plan ties to vision plan whenever possible.
No university-wide tactical marketing plan	Create an integrated marketing plan each year. Establish a marketing advisory council. Meet quarterly with president to review the IM plan, progress, values and related issues.	Wrote six-month IM plan, and then one-year IM plan. Created MAC that meets regularly.

A survey sent to external stakeholders in early 2004 confirmed EMG’s hypothesis that MSU has a good image—but one that is neither strong nor specific. While stakeholders expressed confidence that “MSU is doing a good job,” they could say little else about WHY this is so.

An integrated marketing effort will seek to retain MSU’s overall positive image while making stakeholders more aware of individual accomplishments and the university’s key strengths.

D. Tools

1 Publications planning worksheet/message and hierarchy

Use this worksheet for planning your publications, in order to prioritize and use MSU's key brand messages.

Publications Planning Worksheet

Project _____
 College/department/center _____
 Project manager and contact info: _____
 Format and quantity: _____
 Timing for distribution: one-time only continuing _____
 Method of distribution: _____
 Lifespan of the marketing piece: _____

Purpose of the project. Check all that apply, and rank, if appropriate:

<input type="checkbox"/> Recruitment	<input type="checkbox"/> Retention	<input type="checkbox"/> Fundraising
<input type="checkbox"/> Image enhancement	<input type="checkbox"/> Events-oriented	<input type="checkbox"/> Outreach/education
<input type="checkbox"/> Other _____		

Target audience(s):

<input type="checkbox"/> Potential students:	<input type="checkbox"/> in-state	<input type="checkbox"/> out-of-state	<input type="checkbox"/> graduate students
<input type="checkbox"/> Current students	<input type="checkbox"/> Parents of current students	<input type="checkbox"/> Faculty	<input type="checkbox"/> Staff
<input type="checkbox"/> Alumni, donors, friends	<input type="checkbox"/> Legislators, decision-makers	<input type="checkbox"/> Corporate partners, business community	<input type="checkbox"/> Job recruiters
<input type="checkbox"/> General population			

What action do we want the target audience(s) to take?

How will we measure whether that action has occurred?

Montana State University

Message hierarchy and examples:

RANK	KEY MESSAGE	EXAMPLES
HIGH MED LOW	Integrated learning and discovery of knowledge	
HIGH MED LOW	Nationally and internationally recognized scholars	
HIGH MED LOW	Leading research	
HIGH MED LOW	Student-centered campus	
HIGH MED LOW	Hands-on active learning	
HIGH MED LOW	Spectacular educational setting	
HIGH MED LOW	Service and outreach	
HIGH MED LOW	Others:	

MSU Publications and Graphics

2 Exemption form

Use this form to apply for exemption from the university logo standards, whether it is to combine a program logo with the MSU logo, minimize the MSU logo in relationship to another logo, or drop the MSU logo altogether. A review team works with the university brand manager to study each request for exemption.

Application for exemption from MSU Graphic Identity Policy

In nearly all cases, the MSU logo must be used as outlined in the Graphic Identity Policy (www.montana.edu/logoexemption). However, the MSU graphic design review group will consider requests for exceptions to the policy. Please fill out this form in its entirety and return it to Julie Kipton, Communications and Public Affairs, 416 Calhoun Hall. If possible, include a sample/prototype of the publication or piece in question. Download this form at www.montana.edu/logoexemption

Date: _____
 Name of organization: _____
 Address: _____
 Name and contact information of representative: _____
 Visual presentation(s) for which you seek exemption (e.g., letterhead, brochure, poster, Web site, etc.): _____
 Signature of academic dean or unit director: _____

1. I wish to:
 combine the MSU logo with another(s) of equal graphic importance
 minimize the MSU logo relative to another logo
 drop the MSU logo altogether

2. Our organization is:
 separately incorporated with its own board of directors
 located on the MSU campus in Bozeman but involves other colleges or interests that would not be adequately represented by the MSU logo

3. Please check all the following reasons why you are applying for exemption.
(Use an additional sheet if necessary.)

Using the logo as outlined in the Graphic Identity Policy will substantially inhibit my organization from achieving its communications goals.
 EXPLAIN: _____

Using the MSU logo as outlined in the Graphic Identity Policy would violate laws, contractual agreements or regulations imposed by an external agency.
 EXPLAIN: _____

Combining an external logo with the MSU logo would substantially enhance the communications capability of both groups.
 EXPLAIN: _____

The MSU logo cannot represent the interests of groups external to the campus that cooperate with you?
 EXPLAIN: _____

May I design a new logo or use an existing logo for my program or group?

Anyone may apply for exemption from the MSU Graphic Identity Policy. Your request for exemption will be reviewed by the graphic identity committee. However, before applying for exemption, consider these questions:

- Could your group or program use a unit identifier instead? (see example below) (If no, you will be asked to explain why an MSU unit identifier would substantially inhibit your program or group from achieving its communications goals.) If yes, contact Angie Mangels in MSU Publication and Graphics, 994-5128 or amangels@montana.edu, to receive a unit identifier file.
- Could you use the overall graphic look of your promotional materials (photos, colors, graphic style, etc.) to project a unique identity for your program, while still including the MSU logo (or appropriate brand extension or unit identifier)? (If no, you will be asked to explain why using a form of the MSU logo will confuse stakeholders or drive customers away.)
- Does including the MSU logo violate laws, contractual agreements or regulations imposed by an external agency?
- Is your program or group located on the MSU campus in Bozeman but involves other colleges or interests that would not be adequately represented by the MSU logo?
- Is there a reason that the MSU logo alone cannot represent the interests of groups external to the campus that cooperate with you?
- Does your program or group benefit by maintaining an identity that is separate from MSU? (If yes, this may be an organizational question that should be discussed with the president and/or provost.) If you apply for exemption, the review committee will consider:
 - Whether your group's mission is consistent with one or more of MSU's core missions,
 - Whether your target audience(s) are the same as the core MSU audience(s), and
 - Whether public perception would clearly be enhanced by your group being separated from MSU.
- Other criteria to consider include: source of funding for your organization; whether your group's employees receive an MSU paycheck; what other groups might be confused with yours; does your group benefit in any way from being associated with MSU; and whether your dean, director or department head supports your request to use a unique logo.

Example of unit identifier:

MONTANA STATE UNIVERSITY
 Molecular Bioscience Program

MONTANA STATE UNIVERSITY
 Molecular Bioscience Program

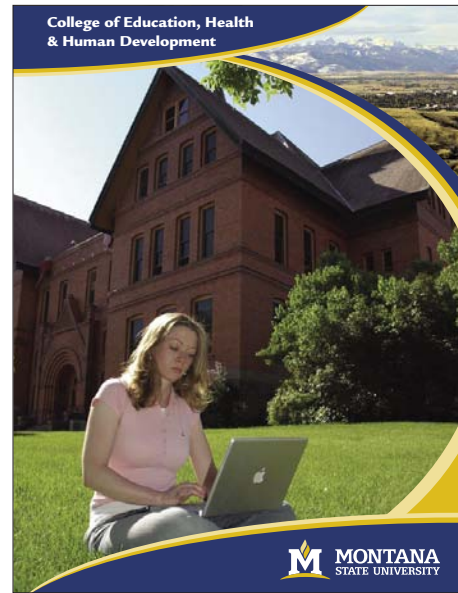
Download form at:
www.montana.edu/planningworksheet

Forms may be downloaded at:
www.montana.edu/logoexemptionform
www.montana.edu/logoexemptionfaq

3 Final Checklist

Am I following the brand?
Use this tool as a final checklist before preparing your publication or other promotional piece for distribution.

- Is the MSU name and logo present and used appropriately; brand extension and unit mark (if applicable)?
- Is the MSU tagline “Mountains and Minds” present?
- Have you included (if applicable) the equal opportunity employer/nondiscriminatory statement or Extension indicia? (Montana State University is an equal opportunity/affirmative action institution.)
- Does your piece have Montana State University on the cover and mailing panel?
- Have you addressed the MSU’s brand strengths that are appropriate for your target audience(s)? Did you use proof points as examples?
- Did you include a call to action (what you want your target audience(s) to do)?
- Have you chosen high-quality photography that showcases the academic quality and lifestyle of MSU?
- Did you use blue and gold as your dominant colors?
- Have you used the MSU branded typefonts, extended color palette and publications style? Is there an arc on the front cover?
- Have you included appropriate contact information?



Appendices

E. Target audience demographics

Undergraduate students

- 12,380 enrolled, 78 percent full time
- Down-to-earth – Enjoy the outdoors and work to protect it
- Strong work ethic – Passionate about intellectual and spiritual growth
- Gender balance (54 percent men, 46 percent women)
- Average undergraduate age: 22.1 years
- 67 percent from Montana, 31 percent other US, 2 percent international. Top states: Washington, Wyoming, Colorado, California, Idaho, Alaska. Minnesota is the top state not in the West.
- Intelligent – Increasing scores on ACT for incoming classes
- 95 percent of incoming freshmen are of traditional age
- 29 percent enrolled in University Studies. Next highest is Engineering
- Most popular programs include: Architecture, Film, Bio-technology, Equine Science, Business, Engineering, Paleontology, and Cell Biology and Neuroscience.

Student testimonials

“MSU provides a campus that has all the amenities and research facilities of a much larger university while maintaining a small campus feel that any student can appreciate and excel in. The small classes and more than helpful faculty made MSU the perfect place for me.”

“Each year I continue to be impressed by the staff and faculty here at MSU. Professors old and new continue to uphold the strong academic legacy that Montana State is known for. In addition, as a junior still living on campus, I find the numerous residence hall activities involve me with people from all over the nation, and I am able to find a balance between work and play.”

“MSU is great because students get to learn through hands-on experience during their first and second year classes instead of having to wait until their upper-division classes.”

“It’s rare to find a combination of great people, a climate to appease many outdoor enthusiasts and a world-class university in a cool college town. MSU succeeds in all of these areas!”

“MSU creates a unique community for American Indian students that allow a supportive and encouraging environment. In this fashion, Native students are assisted in succeeding in all of their endeavors.”

Graduate students

Average age: 31.6

Parents of students

- Very involved and concerned with students’ education
- More complex family situations than ever before

Parent testimonials

“What a great impact you are making on MSU students and parents. I remember when my daughter moved in last year, what a great welcome it was. Hooray for your town and the businesses. You are doing a great job.”

“Your parent group and university professors are so supportive.”

Faculty/staff

- Research oriented – More than \$100 million in research grants
- High ratio of faculty who teach AND do research, so students benefit directly
- Ambitious – Embracing the change Low student/faculty ratio (17:1)
- Committed – Willing to work to make MSU a better place

Alumni/donors/friends

- Diverse – Located in every state in the U.S. and several countries

- Active – Alumni groups in every state and also international
- Involved – 48% of alums remain in Montana devoted to MSU – active alumni groups

Community (Bozeman)

- Good neighbors – Have a great relationship with the university
- Town is high-tech and growing
- Beautiful location – Rocky mountain region
- Year-round outdoor activities – Hiking, skiing, camping
- MSU major employer – Community support (2,800 people employed in 2003)
- All-American City (2003); Top Wireless Mid-sized City (2005); one of “The 18 Best Ski Towns” by SKI magazine; Outside magazine picks MSU as country’s fifth-best college town; Bozeman ranked No. 1 college “small city” in the WEST

State (general public)

- Generally high opinion of MSU but unfamiliar with details
- Overall shrinking support from Montana legislature
- Extension offices throughout the state
- Desperate for online education

Business community

- Very interested in economic development
- Strong ties to business and agriculture programs

Legislators/decision-makers

- Very interested in economic development

Job recruiters and employers

- Value MSU students for their work ethic
- Top recruiters are St. Vincent’s Healthcare, Montana School Districts, Boeing, Morrison Maierle, CTA Architects, Price Waterhouse Cooper, RightNow Technologies.

University Marketing

Julie Kipfer

994-5737

jkipfer@montana.edu

Publications and Graphics

Angie Mangels

994-5128

amangels@montana.edu

Web Communications

Moss Hartt

994-5140

mhartt@montana.edu

University News

News Director

994-2721

msunews@montana.edu

University Printing

Larry Knutson

994-5708

lknutson@montana.edu

Online version of this toolkit is available at

www.montana.edu/brandtoolkit

Several sizes of the official logo can be downloaded from

www.montana.edu/logos

Additional graphic tools and templates at

www.montana.edu/cpa/graphics

News information is at

www.montana.edu/cpa/news/newsservice.php

Web information is at

www.montana.edu/cpa/webcom

Points of Excellence database
(Key messages about MSU)

www.montana.edu/cpa/poe

Graphic Identity Policy

www.montana.edu/graphicidpolicy

Trademark and Licensing Policy

www.montana.edu/trademarkpolicy

Media Policy

www.montana.edu/mediapolicy