Pennsylvania’s State System for Higher Education  
Charge for Communication and Marketing Working Group  
November 12, 2020

**Overview**
The framework for the Working Groups (WG) includes:
- **Integrations Overall Charter** – Provides the purpose and organizational structure for the overall Integrations initiative, including Integration Guidelines with Guiding Principles.
- **Working Group Charter** – Defines the roles and responsibilities of the Working Groups and articulates the purpose, goals, principles, scope, roles, and deliverables with which the WGs are charged.
- **Working Group Charge (this document)** – Includes specific milestones, questions, and goals to be addressed by each WG specifically.

**WG Deliverables and Timing**

<table>
<thead>
<tr>
<th>Timing</th>
<th>Deliverable</th>
<th>Details</th>
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<tbody>
<tr>
<td>11/18/20</td>
<td><strong>Consultation Plan</strong> – Determine who to consult with, how, and how WG consultation aligns with initiative-level consultation</td>
<td>See Consultation Plan template provided on SharePoint.</td>
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<td>12/4/20</td>
<td><strong>Critical Path August 2022</strong> – Confirm the critical path milestones and define the critical path steps and timing to meet critical path milestones for Fall 2022 (what must be done by August 2022 for successful launch and how long will it take)</td>
<td>See Critical Path Milestones and Critical Path Steps template provided on SharePoint.</td>
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<tr>
<td>12/11/20</td>
<td><strong>Aspirational Goals and Annual Targets</strong> – Aspirational goals to accomplish by 2026, and define annual integrated institution targets to evaluate progress</td>
<td>See below and Goals/Targets template provided on SharePoint.</td>
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<tr>
<td>1/8/21</td>
<td><strong>Priority 1 Questions (First Draft)</strong> – Use above to filter, prioritize, and develop draft recommendations for Priority 1 questions (i.e., key questions to define the future state) and accompanying organizational charts and impact analysis</td>
<td>See below, Priority 1 Recommendations template, and Organizational Chart template provided on SharePoint.</td>
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<tr>
<td>1/15/21</td>
<td><strong>Priority 2 Considerations for 2022-2026</strong> – Outline considerations for what can be done after August 2022 and how it can be sequenced (i.e., known prerequisites)</td>
<td>See below and Priority 2 Considerations template provided on SharePoint.</td>
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<tr>
<td>2/12/21</td>
<td><strong>Priority 1 Questions (Second Draft)</strong> – Update recommendations, incorporating feedback from Systems Leadership Team (SLT) on First Draft</td>
<td>See above.</td>
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<tr>
<td>3/12/21</td>
<td><strong>Priority 1 Questions (Final Draft)</strong> – Update recommendations, incorporating feedback from SLT on Second Draft</td>
<td>See above.</td>
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**Goal Setting**

Related to the aspirational goals provided in the Integrations Initiative Charter, define annual integrated institution targets against which to evaluate progress.

**Integration Goal Setting Process**

- **Design**
  - System Leadership Team (SLT)
  - University Integration Leadership Team (ULT)
  - Working Groups

- **Refine**
  - Objectives/Specific Drivers/Actions
    - How?

- **Assess**
  - Aspirational Integration Goals by 2026
    - What do we need to achieve?

- **Execute**
  - Annual Integrated Universities Targets
    - By when?
The overall integration-level aspirational goals are included below and within the Integrations Initiative Charter.

**Aspirational Goals are Linked to Guiding Principles…**

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**Integration Overarching Considerations**

- What is the current resource inventory for the area (people, facilities, technology, policies)?
- What elements can be integrated into a singular structure for performing the necessary functions (and, as an exception, which require joint and concurrent delivery models)?
- What data do we have regarding existing functions in this area? What data will inform decisions?
- What are the qualitative considerations related to integrating this function?
- Have we kept the guiding principles, goals, and objectives in mind in our efforts?
- What input from other working groups is critical to forming alternatives and recommendations?
**For Each Recommendation, Assess the Impacts**

- People – Student, faculty, staff, governance (e.g., trustees, organizations) – individuals impacted by the change and any know required activities to support the change (classification, side letter changes, training etc.)
- Process – Policy, procedures, contracts, partnerships, etc., that support the current state which would have to be changed to support the recommendation
- Technology – Systems, support, applications that support the recommended changes and if any updates would be required
- Finance – Required funding to implement or lead to a cost savings
- Physical Assets – Physical assets (buildings) that would be impacted by recommendations
- Compliance and Legal – Federal, state, and local laws, regulations, and other requirements that would need to be changed to implement the recommendation
- Community – Known community stakeholders impacted by the recommendation
- Benefits – Anticipated benefits associated with the recommendation – linked to goals and objectives, if possible
- Risk – Known risks associated with implementation of the recommendation

Use the considerations and questions below to discuss, prioritize, and develop draft recommendations for Priority 1 questions to define the future state and impact analysis.

<table>
<thead>
<tr>
<th>High-Level Areas of Consideration</th>
<th>Questions to Inform Recommendations</th>
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| **2020-2021 Critical Elements with an as soon as possible/Ongoing Timeline**  
- Internal Stakeholders needs assessment, communication methods  
- External Stakeholders needs assessment, communication methods  
- Communication and key messages  
  - A common narrative that focuses on students’ success and expansion of opportunities for students in the region and beyond  
  - Alignment with existing brand pillars and messages  
- Establishing processes and workflow  | Priority 1 Questions – Critical Path (What design assumptions must be determined for the combined function/one University?)
1. Review and assess existing and available tools, resources, vendor relationships and the ability to move under one central contract.
2. Assess, and recommend marketing and communications workflow across three institutions.
3. Review and assess the organizational structures at all three institutions.
4. Research and assess potential centralized structures for marketing and communications critical functions.
5. What are the priorities, timing, and dependencies of the communication strategy? Consider the following:
   - What coordination with recruitment efforts is necessary? How will a CRM be used to communicate with prospective students? What steps must be taken to maintain enrollment momentum between now and August 2022?
   - How will market research drive communication decisions?
   - Who will develop and manage transitional website? What is the timeline to move to a common CMS? What is the timeline for moving to a new URL – one that reflects the new entity’s name/brand identity?
   - Who will manage social media efforts during integration?
   - What existing publications exist and who manages? What publications should be merged and which (if any) will be concurrent? What is the timeline for moving to merged publications?
   - When would identity and brand decisions to be made? Ahead of 2022 or toward 2026? Who would lead that discussion?
   - What internal and external branding resources will be needed?
   - What is the timing for accreditation decisions?
   - What is the timing for academic program array and how a student would register for courses?
   - How and when will we begin marketing to students? [What requirements must we follow (e.g., accreditation requires the substantive change review must be requested and marketing collateral indicate “pending approval”)]?
   - When will athletics question(s) be answered?
   - When will technology and systems-sharing decisions be made? |
| **2021-2022 Clear pathways for student recruitment**  
- Publications and Press Releases  
- Transition planning  
- Marketing and communications – tools, resources, strategy, budget  
- Transitional website  
- Social media strategy  
- Discuss, plan, strategize branding and optimal timing, common website  | NOTE: Discussion of brand, colors, mascot, etc. is too premature to include in the charge. Likely something to work toward if a priority for 2026 to focus that effort on creating buy-in and support for the new TBD entity. |
### High-Level Areas of Consideration

### Questions to Inform Recommendations

- When would identity and brand decisions to be made? Ahead of 2022 or toward 2026? Who would lead that discussion?
- How will budgeting work in 2021-22 and beyond? What is the expected timing, which will impact when advertising can be in-market?

6. What are the capabilities of marketing and communications at existing institutions and how should these integrate? Consider:
   - How will marketing and communications staffing be organized?
   - How will budgeting work in 2021-22 and beyond? What is the expected timing, which will impact when advertising can be in-market?
   - What tools/resources will we move under one central contract?
   - What vendor relationships can we leverage under one central contract?
   - How will workflow and approvals be managed? How will communication (press releases) be originated/approved and who will be the local point person to field local questions?
   - How will crisis communications be handled?
   - How will target markets be identified and budget allocations determined?

7. What other deadlines and time dependent issues need to be addressed by August 2022?
   - Existing contracts (agencies of record and other contracts)

### Priority 2 Considerations – Implementation Considerations and Any Known Prerequisites

- Can a combined institution leverage community, alumni, or employer marketing or communication resources and, if so, how?
  - Develop in-depth strategies, technologies, and staffing structures.
  - Assess Alumni and Advancement needs.
  - Stakeholder assessment for community and employers.