

Primary Outcomes:

1. Applying the recommendations of the recent strategic communications assessment, align the Office of Communications and Marketing structure, roles and work plans to University-wide needs; collaborate more closely with academic, administrative and athletics leadership to advance the University's brand, visibility and differentiation
2. Develop a customer-focused communications and marketing organization; increase professional capacity and talent
3. Integrate OCM more effectively with Enrollment Marketing and Advancement to strengthen relationships with external stakeholders – current and future
4. Build and oversee strategic communications for the University's comprehensive campaign, including actual materials; strengthen alumni and development stakeholder engagement
5. Provide counsel to define, recruit and onboard the next Executive Director for Strategic Communications and Marketing [title TBD]
6. Serve as the Interim Executive Director of OCM and provide counsel with respect to its daily activities



Project Deliverables and Milestones

Date	Priority Deliverables	Examples of Activities	Key Messages
<p>January 2019</p>	<ul style="list-style-type: none"> ▪ Project announcement, communications and launch ▪ Project outcomes alignment with senior Advancement & University leadership 	<ul style="list-style-type: none"> ○ Distribute communications internal and external (President and Advancement VP) ○ Convene staff for initial planning session (half day); affirm roles and accountabilities; finalize project plan, timeframes and responsibilities; revise and align new website rollout accordingly ○ “Socialize” and confirm project blueprint with senior University leadership and Foundation board 	<p>(see attached draft for January launch communication)</p> <ul style="list-style-type: none"> ➤ UL-Lafayette strategic communications assessment conducted in fall ➤ Because of the upcoming comprehensive campaign and immediate University-wide needs, Interim ED begins late January to implement recommendations, build staff capacity and help recruit and onboard new Executive Director – 6 months term and renewable for 6 months ➤ Position funded by the Foundation and will report to CEO of Foundation/VP for Advancement; OCM staff will report to Interim ED, including Amy Abshire, who will continue in her role as Interim CCO ➤ Please be in touch with Janis (contact information) if you would like to learn more about this project...
<p>January-February 2019</p>	<ul style="list-style-type: none"> ▪ “Deeper dive” into Assessment report with University stakeholders ▪ Initial OCM teambuilding activities ▪ OCM-Athletics task force ▪ Campaign communications plan w/implementation steps ▪ Brand market research exploration 	<ul style="list-style-type: none"> ○ Meet with President, Provost, Deans, VPs, Advancement, Athletics, Foundation Board and other leadership (individually and with OCM staff); internal online survey ○ Guide staff in development of OCM 6- and 12-month high-level work plan ○ Develop scope, timeline and roles for OCM-Athletics task force ○ Meet with Ruffalo-Noel-Levitz regarding enrollment marketing framework; develop action plan ○ Draft campaign communications plan with Advancement team; identify and 	<ul style="list-style-type: none"> ➤ A variety of activities are underway, including... ➤ After meeting with academic, administrative, Advancement, Foundation, Athletics and other senior leadership to learn more about their needs, OCM has set these priorities for the next 6 months – x, y, z, a, b, c... ➤ Other key messages TBD

		<ul style="list-style-type: none"> ○ schedule external talent for materials development ○ Evaluate potential market research partners and timelines; launch market research project 	
March-April 2019	<ul style="list-style-type: none"> ▪ Draft OCM structure (centralized and distributed roles, processes, etc.) ▪ Campaign communications ongoing ▪ Market research findings and recommendations 	<ul style="list-style-type: none"> ○ Evaluate best practice structures among UL-Lafayette peers and competitors; select best option; implement revised standards and practices ○ Coach and mentor OCM staff ○ Complete Athletics task force; recommendations to leadership ○ Continue development of advancement and campaign communications per best practices ○ Evaluate and apply market research results ○ Brief University and Foundation Board leadership as appropriate 	<ul style="list-style-type: none"> ➤ After evaluating the University’s brand guidelines and selected other peer and competitor institutions, OCM proposes a series of revised standards and practices, which we will be sharing with you to gain your input and then finalize ➤ Initial market research findings, the first in 10 years as the University has grown and changed, recommend these high-level brand messages, which we also will be sharing widely to gain further input and perspectives; once complete, this updated brand platform will guide the campaign, academic and enrollment marketing and overall University strategic communications
May-June 2019	<ul style="list-style-type: none"> ▪ Roles and responsibilities defined, job descriptions revised ▪ Launch search for new Executive Director ▪ First phase of Advancement/campaign communications plan implemented 	<ul style="list-style-type: none"> ○ Continue implementation of new model ○ Conduct Executive Director search ○ Continue enhancements in advancement and campaign communications ○ Brief University and Foundation Board leadership as appropriate 	<ul style="list-style-type: none"> ➤ The framework of the revised OCM customer-focused model is now in place; here is how we propose to work with you; we’ll be sharing and discussing this with you in meetings in your units as we develop new ways of working together ➤ As we prepare for the University’s comprehensive campaign, here are some of the tools we’ll be using to enhance stakeholder engagement (alumni, development, external partners, internal audiences) ➤ The Executive Director search is underway – here is the job description and our proposed timeline; if you know of anyone interested in applying, please forward them these links [website contact information]

<p>July-December 2019</p>	<ul style="list-style-type: none"> ▪ Campaign communications activities implemented ▪ New Executive Director hired ▪ Continuation of other transition management activities 	<ul style="list-style-type: none"> ○ Onboard new Executive Director; develop communications plan for this role and next steps for OCM ○ Complete and confirm revised OCM structure ○ Potentially launch new branding campaign ○ Brief University and Foundation leadership as appropriate 	<ul style="list-style-type: none"> ➤ We've hired our next Executive Director for Communications and Marketing (details, timeline and next steps) ➤ Here is what this means for you...
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DRAFT ANNOUNCEMENT (also can serve as talking points for Foundation Board)

12/16/18 – for release early January 2019

Dear X [University, Foundation and Advancement leadership, OCM staff, others who engaged in the communications assessment]

As you know, the UL at Lafayette Foundation engaged external counsel prior to the holidays to conduct a strategic communications and marketing assessment so that we might better understand our opportunities for improving communications and marketing activities in this time of growth and change at the University. This effort was particularly timely due to Aaron Martin's departure and preparations for the University's upcoming comprehensive campaign. I especially want to thank Aimée Abshire, interim Chief Communications Officer, and her staff for their enthusiastic support of this project, as well as the University and Foundation leadership who made themselves available for interviews by our consultants, The Napa Group.

We gained many valuable insights and recommendations from The Napa Group, a strategy, leadership and organizational design firm that specializes in higher education and strategic communications (napagroup.com). One of our considerations in engaging that firm was its capacity to also help us implement the findings. As a result, I am pleased to announce that Janis Johnson, senior partner for The Napa Group and an experienced higher education communications and marketing senior professional, will join us as Interim Executive Director for Communications and Marketing in January.

Janis will be with us for six to twelve months, spending a significant amount of time each month on campus based on a defined project plan and deliverables. Ultimately she will help us create the job description and recruit the next senior leader for OCM as the University anticipates its next decade. We expect that search to begin later in the spring. In the near term, however, because of her management experience in higher ed communications and marketing, she will oversee the work of OCM; help build and expand staff capacity and capabilities; assist us in developing a customer-focused organization; provide guidance for enhancing the University's brand differentiation and visibility; and apply her hands-on expertise in fundraising communications to advance readiness for our emerging comprehensive campaign.

Janis will report to John Blohm, VP for Advancement and CEO of the Foundation, serve as a member of the Advancement senior team, work closely with University leadership



and provide oversight for OCM. Aimée Abshire will continue in her role as Interim CCO of OCM and work closely with Janis on a day to day basis to continue the University's communications and marketing momentum.

We look forward to your participation in this vital project as we aim to strengthen our brand and closely align our strategic communications and marketing activities with institutional priorities and best practice.

[signed]

President Savoie

John Blohm