

# University of Portland

Proposal

**Brand Research,  
Strategy, and Creative**



CARNEGIE

# Thank you for considering Carnegie to refresh your brand!

We realize how significant a brand project is for the University of Portland and that you expect to be wowed. That you want a partner who is going to push you creatively and align seamlessly with your web project, while also garnering cross-campus buy-in and excitement.

There is no more important time to ask the questions: Who is the University of Portland and who do we want to be? That is where our work together begins.

Dear Mai Nhia and Greg,

Your website is the gateway to your brand, so we commend you for having the foresight to review them in tandem. There has never been a more important time to speak to your multiple audiences in a highly personalized and emotive way - with authenticity and confidence. We are uniquely qualified to help you do just that, to boldly tell your story in a way that resonates, engages and motivates to action. How do you cut through the noise and make real gains that will move the needle? You need a partner who understands your marketing and enrollment challenges and knows how to solve them to maximize your draw-regionally and nationally.

In this proposal, you'll find our recommended paths forward for your Brand Refresh project. Our revolutionary research is unrivaled, and we originated the most advanced personality definition model in the industry. With its more than 7,000 possible solutions, we tap into the core DNA of what makes the University of Portland different from your competitors. That work will then form the foundation for creative work and visual identity exploration.

The following proposal lays out our proposed process, budget, and timeline and offers some examples of our most recent and relevant client partnerships. We are excited to use this proposal as a springboard for further discussion—we want to ensure that we tailor the final scope of work to your exact needs.

Go Pilots!

Nicole

**Nicole Vilegi-Sandage**

Director of Client Success

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# Proposal Contents

Our mission is to help our clients understand who they are, who their audiences are, and how to forge powerful and enduring relationships. We offer a comprehensive and integrated portfolio of services that generate results for whatever challenges you may face. We invented our proprietary methods and tools because nothing like them existed in the marketplace to provide solutions.

Our talented force of strategic thinkers are passionate about your triumphs. We stack your deck by employing industry leaders and insiders who not only love to succeed but also love to help you change the game. This is how we earn your trust as an invaluable strategic partner.



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# Your Goals + Opportunities

The landscape of enrollment is ever shifting, and we are here to help chart a path forward to meet your goals.

# Your Goals + Customized Solutions

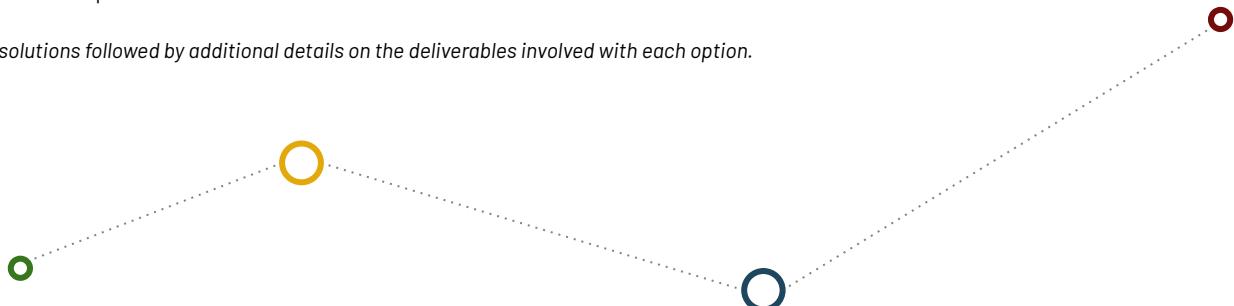
At Carnegie, we pride ourselves on our customized and integrated approach. This means that while we offer hundreds of marketing and enrollment solutions, our team of experts has selected the optimal solutions to meet your specific needs. Given the scope of a comprehensive brand and website project, we want to offer custom solutions that meet your timeline and budget. To that end, we are providing two different options to meet your needs, identified below.

## What You Need:

**We understand from our discussions that you have the following goals for this project and for your institution:**

- + Gain consensus for consistent brand expression
- + Refresh the brand to align with the investment in the website
- + Build a visual brand and brand messaging system that can be executed consistently across departments
- + Develop strategies to differentiate from the competitive set
- + Develop strategies to increase brand awareness and reputation

*The following pages provide an outline of the two solutions followed by additional details on the deliverables involved with each option.*



# Custom Solution A: Brand Refresh + Execution

Our brand definition process is highly effective and methodical. In this work, we'll engage your stakeholders, leverage rigorous qualitative and quantitative research, and arrive at a brand strategy that is unique, resonant, and lasting.

# Customized Solution: Option A

Based on the goals outlined in the preceding section, we have crafted two possible solutions for you. Custom Solution A includes not only the development of a powerful brand strategy, but also some foundational brand expression elements to serve as a springboard for the website and other marketing endeavors on the horizon. Included in this option:

## Brand Development

### Initiate qualitative and quantitative research with internal stakeholders

- + Align internal brand aspirations for who the University of Portland desires to be
- + Ensure the final brand approach has maximum authenticity

### Conduct an online market perception study with external audiences

- + Understand institutional strengths and weaknesses by market and demographic

### Analyze the brand expression of your institution against competitors

- + Identify gaps and opportunities in brand positioning to own a unique market position
- + Prioritize strategies and tactics that will move the needle the most

### Create a robust brand messaging platform

- + Develop brand messaging that aligns internal stakeholders and establishes your unique position in the market

### Audit visual identity to convey new market positioning

- + Understand the pros and cons of your current visual brand
- + Learn how to enhance the vibrancy of your visual brand expression based on data from the brand research

### Develop brand standards for consistent brand expression

- + Provide the tools staff need to express the brand consistently across channels and mediums

### Develop campaign concepts to express the visually refreshed brand

- + Improve brand reputation through vibrant brand expression that engages audiences

### Create messaging playbook to provide audience-specific content for new brand and brand concept

- + Increase message personalization and consistency with expanded ready-to-use copy for important audiences

# Carnegie's Approach to Creating Leading Brands

Our distinctive psychological approach to brand storytelling has evolved over 20 years into a first-of-its-kind psychometric marketing model. Psychometrics is about understanding who you are to create a human connection that engages your target audiences and drives action. **This empowers your team to make 1:1 connections—even when you're talking to thousands.**

Understanding who you are as an institution begins with our nine archetype system that provides easily recognizable and understandable ways to represent vast amounts of information. We combine this with the power of over 100 possible brand traits and uncover the ones that are most powerful at your institution. This framework creates more than 7,000 potential combinations of authentic brand personality that are further tailored through an institution's brand promise and brand pillars.

**The result is a brand personality that only you can truly own.**



## Research

Rooted in personality science, our research model analyzes data from internal stakeholders, external markets, and competitors to define your unique market position. We humanize your institution from within, building consensus and unifying your stakeholders with unmatched potency.

## Strategize

With robust data in hand, we will craft unique insights and recommendations to guide your brand implementation. We will then build a custom brand messaging platform that positions you strategically, empowers your storytelling, and connects you to key audiences.

## Activate

Turn strategy into action by understanding how to fully activate your brand. Carnegie will support operationalizing your brand through training, brand governance, and other support services to empower internal stakeholders to "live your brand."

## Express

With internal stakeholders aligned, it's time to express the brand to external audiences. Our exceptional creative team will craft your unique story with powerful, engaging design and imagery for meaningful brand expression across channels and mediums.

# Phase I: Research

## *Personality Science*

The foundation of our brand strategy work is a three-pronged research methodology.

**Deliverables include:**

### + Internal Stakeholder Research

Understand who internal stakeholders say you are.

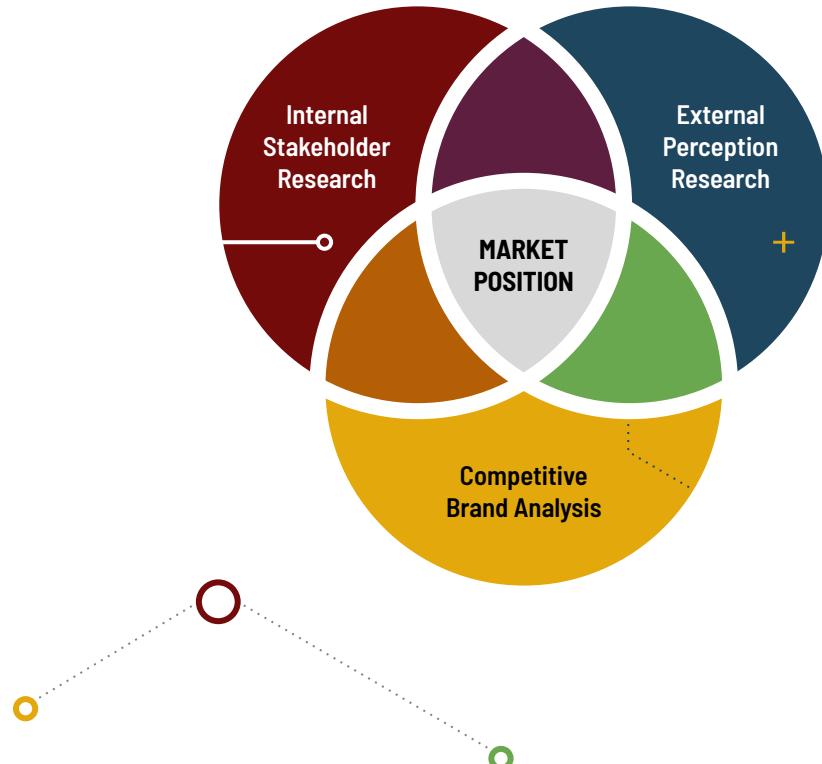
### + External Perception Research

Learn who the external market perceives you to be.

### + Competitive Brand Analysis

Discover how you can tell your authentic story in a competitive landscape and stand out for all the right reasons.

**This unique combination of data points creates your optimal market position.**



Custom Option A | Phase I: Research

# Internal Stakeholder Research

We know that you have key stakeholders that need to be engaged in any brand strategy project and our interactive workshops are the perfect forum to gain their insights in a structured and productive way. Involving their voices early in the project will help increase buy-in and lay a foundation of understanding that will facilitate the eventual roll out of your brand strategy.

## You will gain:

- + Internal consensus on the direction of the brand project
- + Data to ensure authenticity of brand personality
- + Leadership buy-in for eventual brand implementation

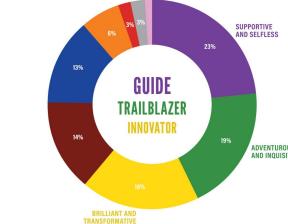
## Includes discovery of:

- + Your institution's potential archetypes
- + Archetype-based traits and faults
- + Trait groupings and rankings
- + Emotive purpose and motivation
- + Personality evidence and proof points
- + Authentic narratives



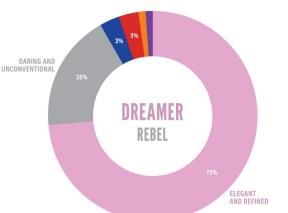
## Who are you today?

We start by asking your internal stakeholders (through a number of frameworks) to individually and collectively evaluate your current personality through an archetypal lens. Before we think about the future, we need to understand who you are today.



## Who should you be tomorrow?

From there, we search for a grounded-in-reality sense of who the institution should aspire to be moving forward. Our comprehensive tool has internal validity to ensure that we arrive at an authentic outcome that can be embraced by the community.



## Who should you never be?

Part of authenticity is knowing who you are not. Our brand strategy is informed by who the institution should never be to avoid drifting into spaces that lack distinction and clarity for those with whom we seek connection.

# External Perception Research

How do you know definitively what your institution's reputation is? How familiar is the market with your institution—especially compared to your top competitors?

Carnegie will conduct focused quantitative consumer research utilizing high-impact and targeted opt-in methodologies to determine what the unbiased general market believes about your institution. The study is segmented by region using Nielsen DMAs and allows you to understand levels of awareness, reputation scoring, and personality-driven perceptions of your institution by specific market area. This research provides an in-depth look into perceptions of prospective students, parents, educational influencers, and the general public to inform a wide range of enrollment and communication strategies and set a benchmark to judge future progress.

## You'll be equipped with:

- + Strengths and weaknesses by market and demographic accompanied by recommended strategies
- + Quantifiable data to identify your institution's market position compared to competitors
- + Familiarity and reputation benchmarks to compare future marketing and enrollment strategies against

## QUESTION 1

HOW FAMILIAR ARE YOU WITH THE FOLLOWING UNIVERSITIES?

OVERALL RANK	NONE	NAME ONLY	LOW	MEDIUM	HIGH	SCORE	TIER*
#1 University of Notre Dame	4%	13%	25%	26%	32%	168	1st
#2 Colgate University	14%	23%	27%	19%	18%	106	2nd
#3 Villanova University	22%	29%	21%	16%	11%	64	3rd
#4 Baylor University	18%	32%	27%	15%	8%	61	3rd
#5 Carnegie University	35%	25%	17%	14%	10%	38	4th
#6 University of Arkansas	37%	31%	19%	8%	5%	12	5th
#7 Tulane University	36%	33%	18%	9%	3%	12	5th
#8 Illinois State University	48%	31%	11%	7%	3%	-13	6th
#9 University of Tennessee (Knoxville)	52%						
#10 Elon University	60%						
#11 Queens University of Charlotte	66%						

\*Indicates institutions within the same tier scored statistically similarly on familiarity

## QUESTION 2 (CONTINUED)

WHAT IS THE OVERALL REPUTATION OF THESE UNIVERSITIES?

CHARLOTTE, NC	POOR	BELOW AVG	AVG	ABOVE AVG	EXCEPTIONAL	SCORE	TIER
#1 Tulane University	0%	1%	28%	36%	34%	517	1st
#4 Carnegie University	3%	3%	29%	39%	26%	404	3rd
#10 Queens University of Charlotte	2%	16%	49%	23%	9%	105	6th
CHICAGO, IL	POOR	BELOW AVG	AVG	ABOVE AVG	EXCEPTIONAL	SCORE	TIER
#1 University of Notre Dame	3%	1%	19%	42%	35%	534	1st
#5 Carnegie University	3%	9%	35%	37%	17%	282	3rd
#10 Queens University of Charlotte	12%	19%	58%	8%	4%	-135	5th
KANSAS CITY, MO	POOR	BELOW AVG	AVG	ABOVE AVG	EXCEPTIONAL	SCORE	TIER
#1 Tulane University	1%	9%	30%	40%	19%	340	1st
#5 Carnegie University	6%	4%	45%	37%	8%	190	3rd
#10 Queens University of Charlotte	7%	18%	50%	16%	9%	11	6th

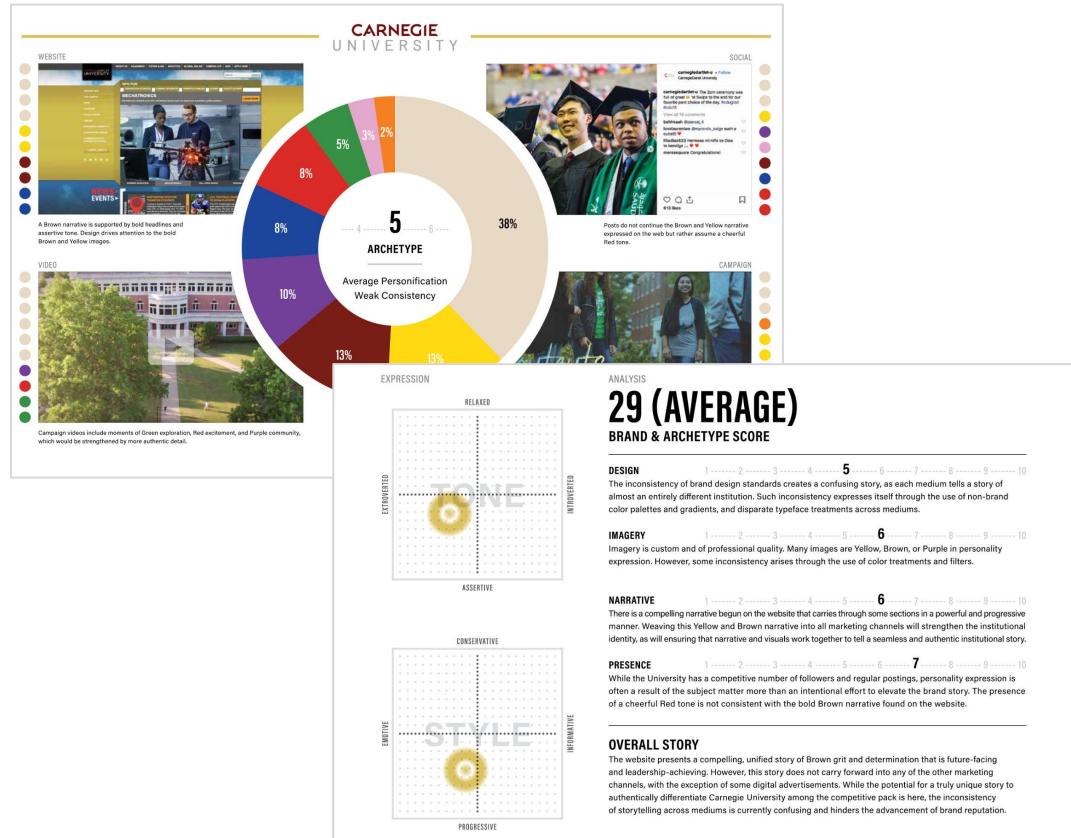
Custom Option A | Phase I: Research

# Competitive Brand Analysis

Gain powerful insights into your direct competitors and discover prime positioning opportunities that help you stand apart. Through our wholly original approach to competitor analysis in higher education marketing, we place ourselves in the position of a student, evaluating your institution against your competitor schools' primary campaigns and marketing messages to reveal who is saying what—and who is doing it best. From websites and social media presence to print and video campaigns, we analyze the communication channels most responsible for shaping prospective student perception and engagement.

## You will gain:

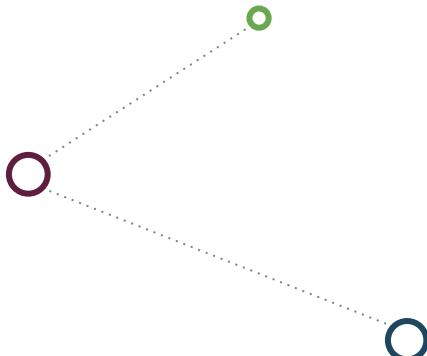
- + Insights into personality, tone, and style of each competitor
- + Understanding of channel-specific trends
- + Strategy recommendations to differentiate your brand storytelling
- + Robust rubric analysis of design, imagery, narrative, and engagement to evaluate the overall brand story



# Phase II: Strategize

## *Brand story development*

Having established your unique market position at the intersection of internal stakeholder research, external perception, and competitive analysis, it is time to build your brand story. We will provide a brand messaging platform that will serve as the foundational document to align your stakeholders behind the new brand strategy.



### **Deliverables include:**

- + Brand personality message platform**
- + Brand strategy and positioning**
- + Brand voice and story**
- + Brand promise and pillars**
- + Brand pillars and traits**
- + Brand anthem**
- + Brand creative core**

Custom Option A | Phase II: Strategize

# Brand Strategy + Platform Development

Armed with reams of rich data and insights from workshops, surveys, interviews, and the competitive analysis, our team develops a compelling overall brand strategy for an exponential and multi-generational effect. At the heart of this deliverable is your brand personality and platform strategy, which fuse together to create an unmatched storytelling tool. This foundational document will serve as the basis for marketing campaigns, staff communications, and beyond, creating sustained brand and reputation performance.

## You will gain:

- + Messaging for each brand pillar that can be used immediately across channels
- + A roadmap for consistent brand expression
- + Understanding of how to implement the brand personality



## Brand Anthem Example

At Carnegie University, we are determined to thrive in the competitive world of higher education, offering our exceptional students highly accessible, award-winning programs to equip them for lifelong success. Our resolve to pursue excellence in all things is matched only by our tireless commitment to invest in our students. CU's faculty and staff are dedicated to doing more than what is expected, pouring time and energy into each student to propel them toward graduation and beyond. When the going gets tough, and changes abound, we continue to add value, navigating an ever-shifting global landscape in pursuit of an even stronger future.

At CU, we endeavor to transform our students by providing a cutting-edge environment, future-focused programs, and an intelligent approach to education that will inspire meaningful change. We are never afraid to do the unexpected or unconventional in search of a better solution. We are visionary in our collaboration, recognizing the incredible potential of new perspectives. Tirelessly focused on what's coming next, we inspire our students to challenge the status quo as they pursue their passions, equipping them to leverage their talents to transform the world.

We are an inclusive living and learning community where all are welcomed, and differences are celebrated—because we have learned that there is strength in unity and unity in diversity. Here, you will find a level of personalized care that binds us together deeply and sincerely. When we learn and grow side-by-side, we can all achieve more because a strong support system breeds confidence, and confidence breeds success. We truly believe that by taking care of each student, we empower them all to reach their highest potential. This commitment to nurturing excellence and individuality extends beyond campus to our community and our world, opening doors and creating lifelong opportunities to thrive.

This is Carnegie University.

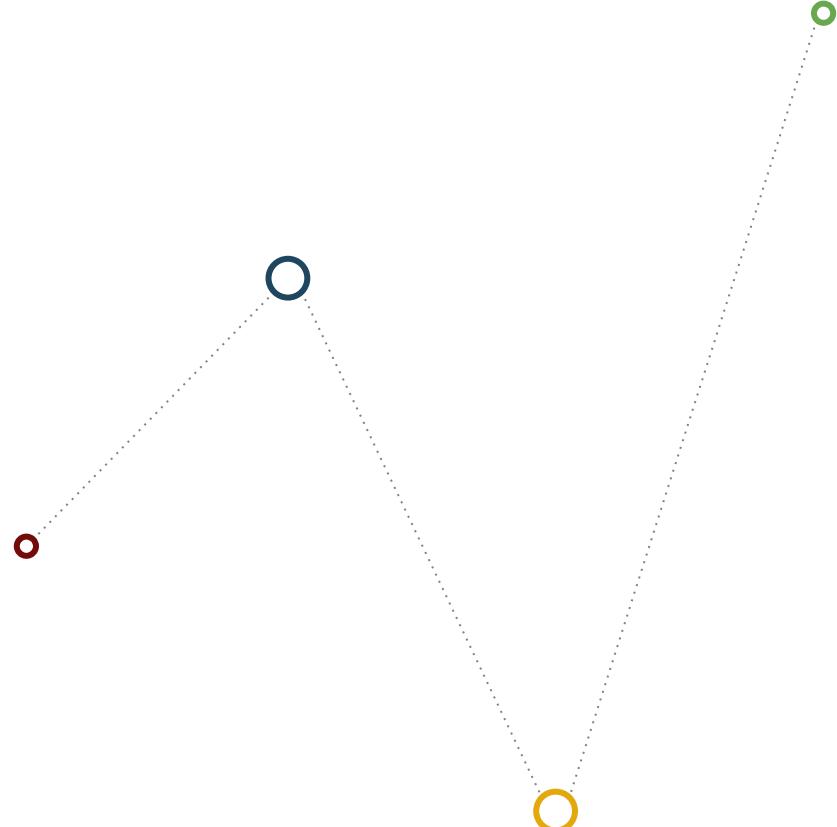
# Phase III: Activate

*Turning strategy into action*

Once we've done the consensus-building work of discovering your unique DNA, we'll help you bridge the gap between brand definition and internal operationalization. From training communicators to equipping leadership with on-brand messaging to developing brand governance, we will empower your stakeholders to live your brand effectively. This consistency is the key to building a strong reputation.

**Deliverables include:**

- + **Internal brand launch**
- + **Training**
- + **Visual identity audit**



# Visual Identity Audit

We realize that while you don't want to redevelop your visual identity system from the ground up, you want to evaluate and potentially evolve it. Based on what we learn from our research and our review of your existing system, we'll help you chart the best path forward.

## In this part of our work, we'll:

- + **Identify relevant data points from our research** that should inform our perceptions of the existing visual identity system.
- + **Take a deep dive into the institution's current identity.** We'll review all of the guidelines related to logos, font libraries, color palettes, tone and style guidelines, and acceptance use examples. We'll also review how the identity system is applied across a suite of materials, including collateral, web, social, digital, and environmental communications.
- + **We'll create a formal, written report that documents our observations and analyses, as well as recommendations** for any ways in which we feel an evolution or adaptation of the existing system would serve the rollout of the University of Portland's brand.
- + **For any creative production work we recommend,** we'll provide formal pricing and scope of work for your consideration.

Custom Option A | Phase III: Activate

# Internal Brand Launch and Training

Message training workshops empower your marketing and enrollment professionals—and stakeholders across campus—to tell your institution's brand story consistently and effectively. Carnegie experts will provide guidance on implementing your new brand personality with exercises like writing personality-rooted messages, selecting images based on personality, and personified storytelling for social media.

## You will gain:

- + Ability to re-engage stakeholders and kickoff the implementation phase with a formal presentation of the research results and brand strategy
- + Practical experience in writing on personality for channels most important for implementation
- + Assistance in training your staff to implement the brand work effectively
- + Exercises that can be used again to train additional and new staff



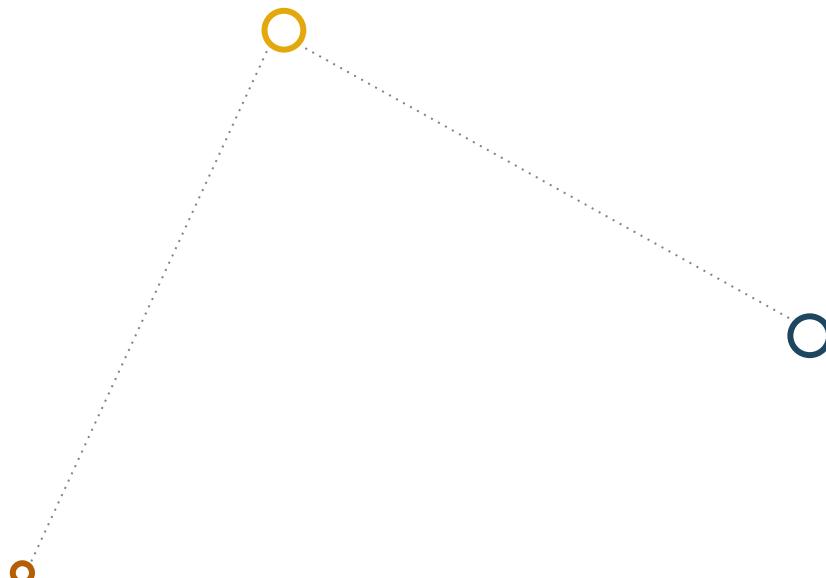
# Phase IV: Express

*Launching your brand in the market*

It's time to launch your new brand! We will transform it into inspiring arrangements of aesthetic, substance, and drive—effectively humanizing your organization through creative visual expression. Demonstrating a clear, consistent personality will drive market awareness and perception and differentiate you from the competition.

**Deliverables include:**

- + **Creative concepts**
- + **Messaging playbook**



Custom Option A | Phase IV: Express

# Creative Concept Development

Guided by research and driven by strategy, we'll develop a foundational creative brand concept to bring your brand to life visually. This brand concept will provide you with an enterprise-level creative campaign that speaks to your institution's multiple audiences in a bold and timeless way.

## You will gain:

- + A custom story arc, design and messaging rationale to visually express your brand story
- + Sample canvases demonstrating how the concept may be expressed across audiences and channels
- + The foundation for a university-wide campaign to launch your brand into the market in an emotive and effective way that generates engagement

\* These are not finalized deliverables; but visual demonstrations that convey the various ways the concept can extend. The concepts will be delivered via virtual presentation, with the goal of selecting and refining a single direction to activate and extend across campaigns.

**Note: Potential cost savings may be achieved when including this product. Original web pricing included two web concepts. If an overall brand campaign concept is chosen here, our web team can translate that into web design without the cost of developing a second web concept.**



Augustana College

Our "Boldly, Brightly" creative campaign for Augustana contributed to 33% growth in student enrollment since 2020.

# Messaging Playbook

Our messaging playbook serves as a companion piece to the creative concept. This document addresses the University of Portland's need for recommendations on brand storytelling and content strategy to connect with your multiple audiences.

**This highly tactical messaging framework demonstrates the successful application of your brand personality to your communications. The goal of this tool is to empower your stakeholders to deliver powerful and effective branded messaging.**

The playbook includes an overview of your personality, storylines, cause statement, and tone, and style guidelines.

To develop this playbook, we'll hold one discovery session for each audience (for example, prospective undergraduates, prospective graduates, alumni). For each of those specific audiences, we'll provide a unique positioning statement with accompanying proof points, as well as a sample of audience-specific content that reflects University of Portland's brand. We anticipate up to two rounds of revision.

# Custom Solution B: Defining Your Brand

We also created a lower-cost option that involves Carnegie handling the brand research and strategy with brand implementation and expression being handled internally by the UP team.

# Customized Solution: Option B

Option B offers all of the rich benefits of utilizing our unrivaled consensus-building brand methodology, including internal stakeholder research, external perception research, and competitive analysis along with a brand strategy and a brand messaging platform. However, it does not include several products to help with brand activation and expression. While this option is more cost effective and takes less time for what Carnegie, it does involve considerable time and resources from the UP staff.

## How Carnegie Can Help:

Our proposed solution includes the following strategies and projected outcomes:

### Brand Development

#### Initiate qualitative and quantitative research with internal stakeholders

- + Align internal brand aspirations for who the institution desires to be
- + Ensure the final brand approach has maximum authenticity

#### Conduct an online market perception study with external audiences

- + Understand institutional strengths and weaknesses by market and demographic

#### Analyze the brand expression of your institution against competitors

- + Identify gaps and opportunities in brand positioning to own a unique market position
- + Prioritize strategies and tactics that will move the needle the most

#### Create a robust brand messaging platform

- + Establish brand messaging that aligns internal stakeholders and engages audiences

#### *Option B does not include:*

- + Visual identity audit
- + Brand standards
- + Campaign concepts
- + Message playbook

# Phase I: Research

## *Personality Science*

The foundation of our brand strategy work is a three-pronged research methodology.

**Deliverables include:**

### + Internal Stakeholder Research

Understand who internal stakeholders say you are.

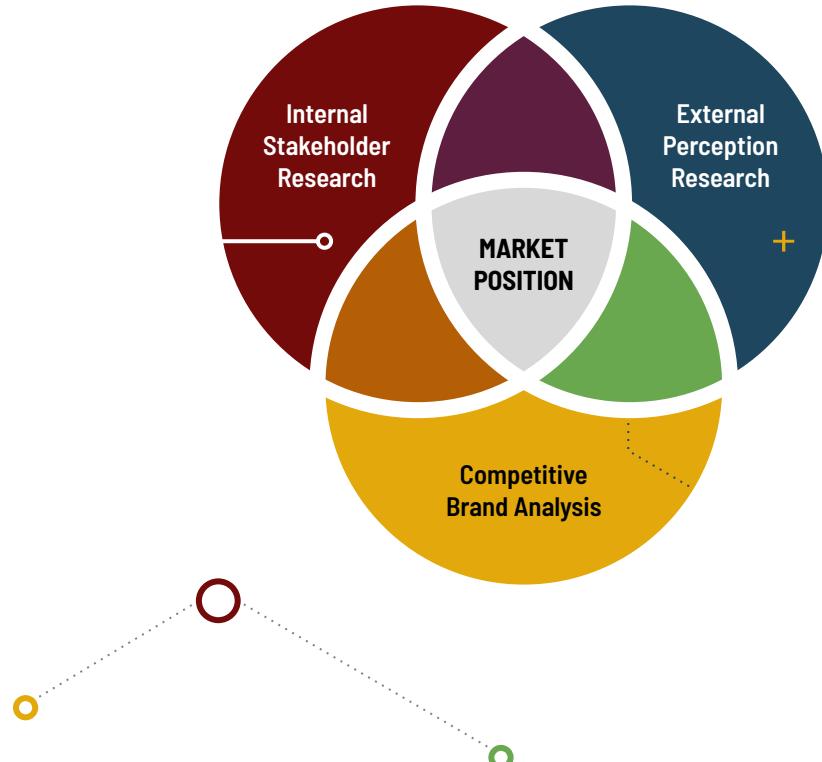
### + External Perception Research

Learn who the external market perceives you to be.

### + Competitive Brand Analysis

Discover how you can tell your authentic story in a competitive landscape and stand out for all the right reasons.

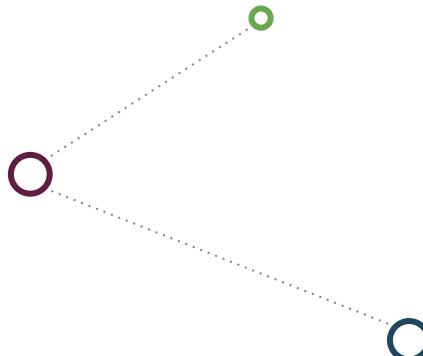
**This unique combination of data points creates your optimal market position.**



# Phase II: Strategize

## *Brand story development*

Having established your unique market position at the intersection of internal stakeholder research, external perception, and competitive analysis, it is time to build your brand story. We will provide a brand messaging platform that will serve as the foundational document to align your stakeholders behind the new brand strategy.



### **Deliverables include:**

- + Brand personality message platform**
- + Brand strategy and positioning**
- + Brand voice and story**
- + Brand promise and pillars**
- + Brand pillars and traits**
- + Brand anthem**
- + Brand creative core**

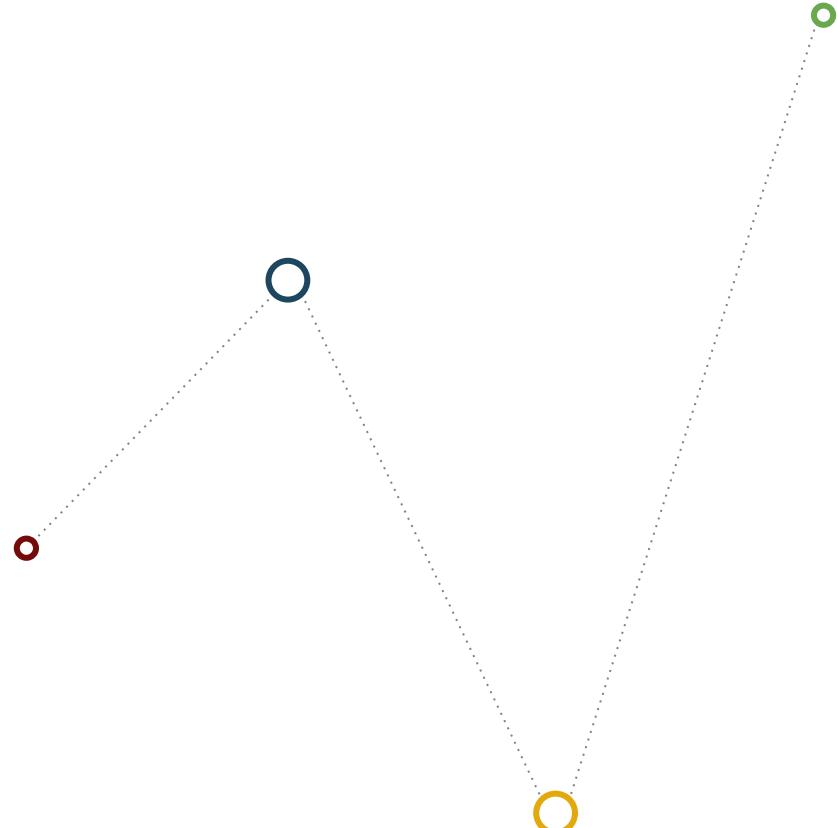
# Phase III: Activate

*Turning strategy into action*

Once we've done the consensus-building work of discovering your unique DNA, we'll help you bridge the gap between brand definition and internal operationalization. From training communicators to equipping leadership with on-brand messaging to developing brand governance, we will empower your stakeholders to live your brand effectively. This consistency is the key to building a strong reputation.

**Deliverables include:**

- + **Internal brand launch**
- + **Training**



# Project Management & Potential Timelines

With a dedicated account manager, a team of subject matter experts, and technology to keep us all on task, our processes maximize collaboration while streamlining efficiencies for staff.

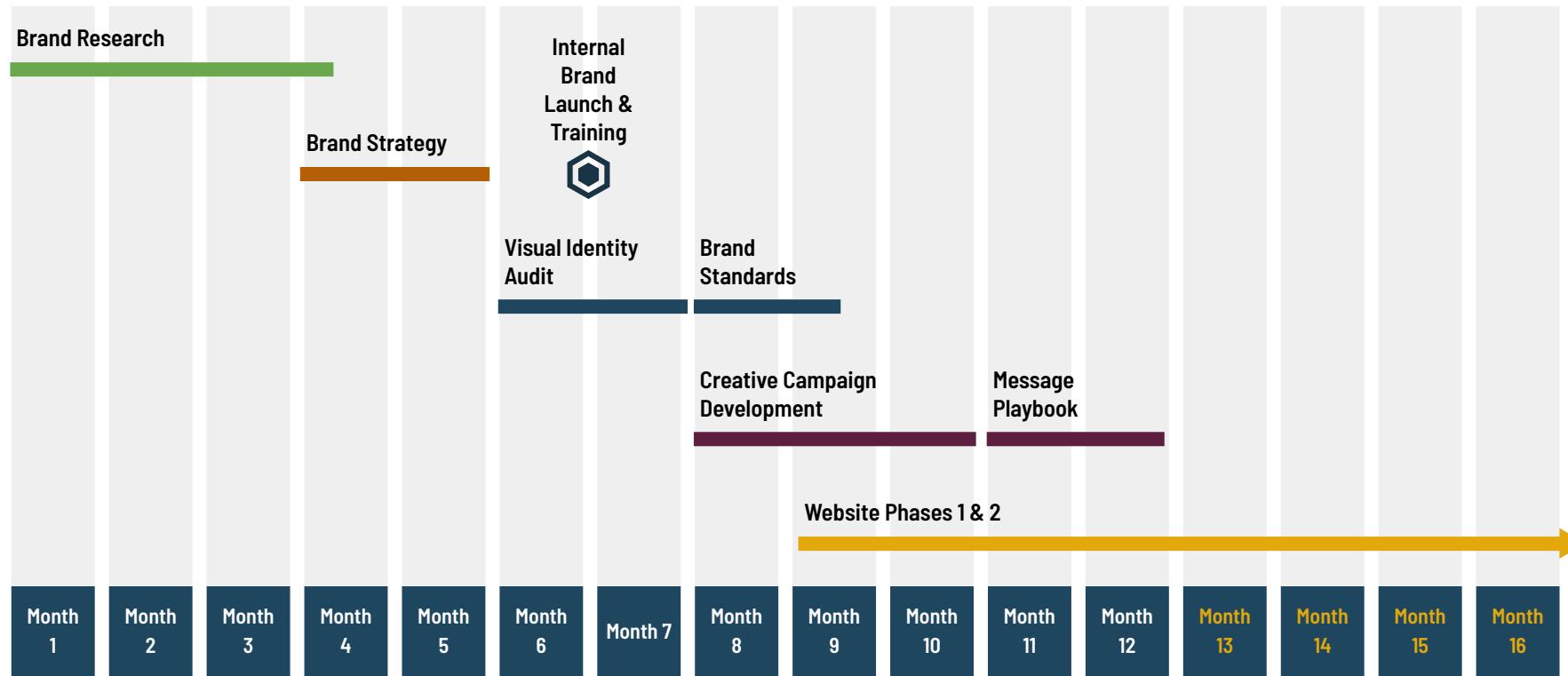
# Project Collaboration and Partnership

- + Core team of Strategists, Client Success Leader, and Account Manager
- + Our full team of experts directly accessible to you throughout
- + Regular status meetings and sharing of work product
- + Excellent project management and collaboration via Asana



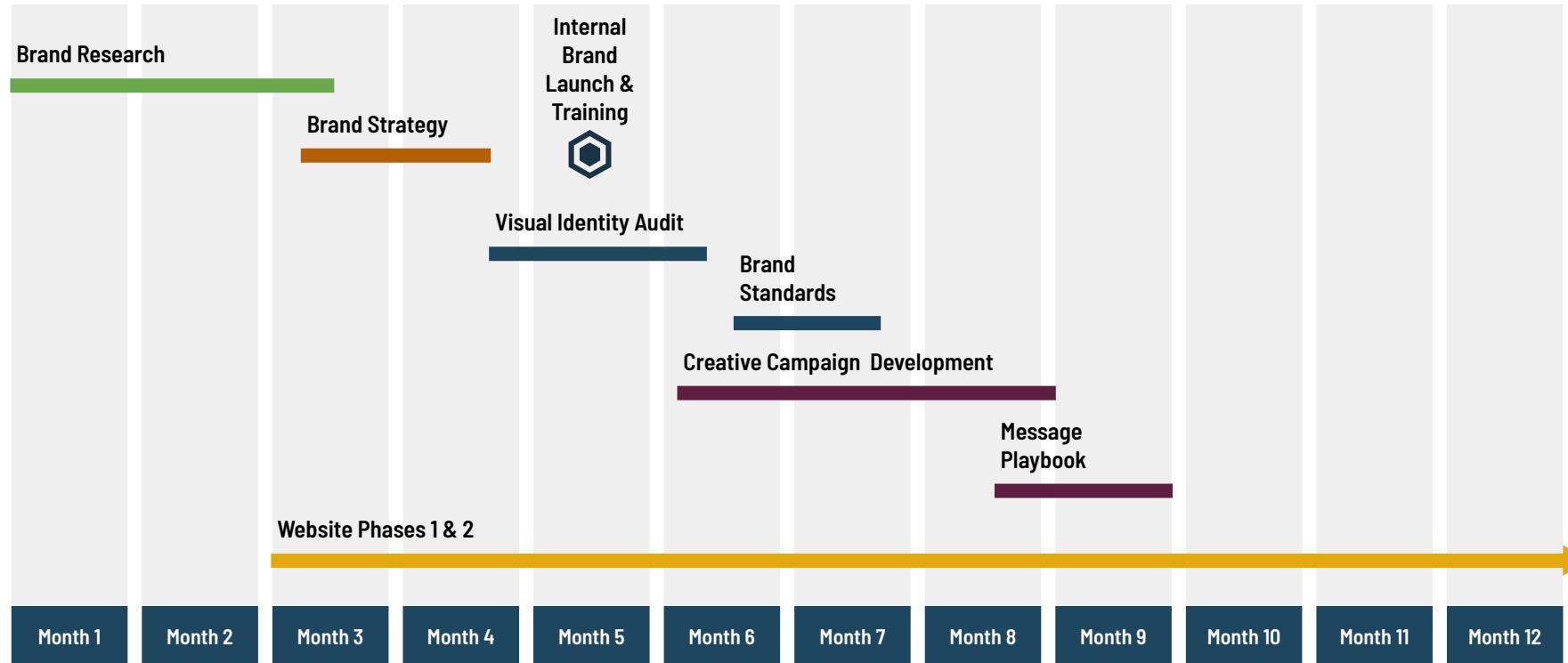
# Custom Option A: Ideal Timeline

Custom Option A is shown below in a sequential timeline. Pros: This timeline involves a thoughtful sequence of projects so as not to overwhelm the UP team. It also involves the least amount of revisions, creating some cost savings. Cons: It does take additional time as web design will be contingent on the chosen campaign concept.



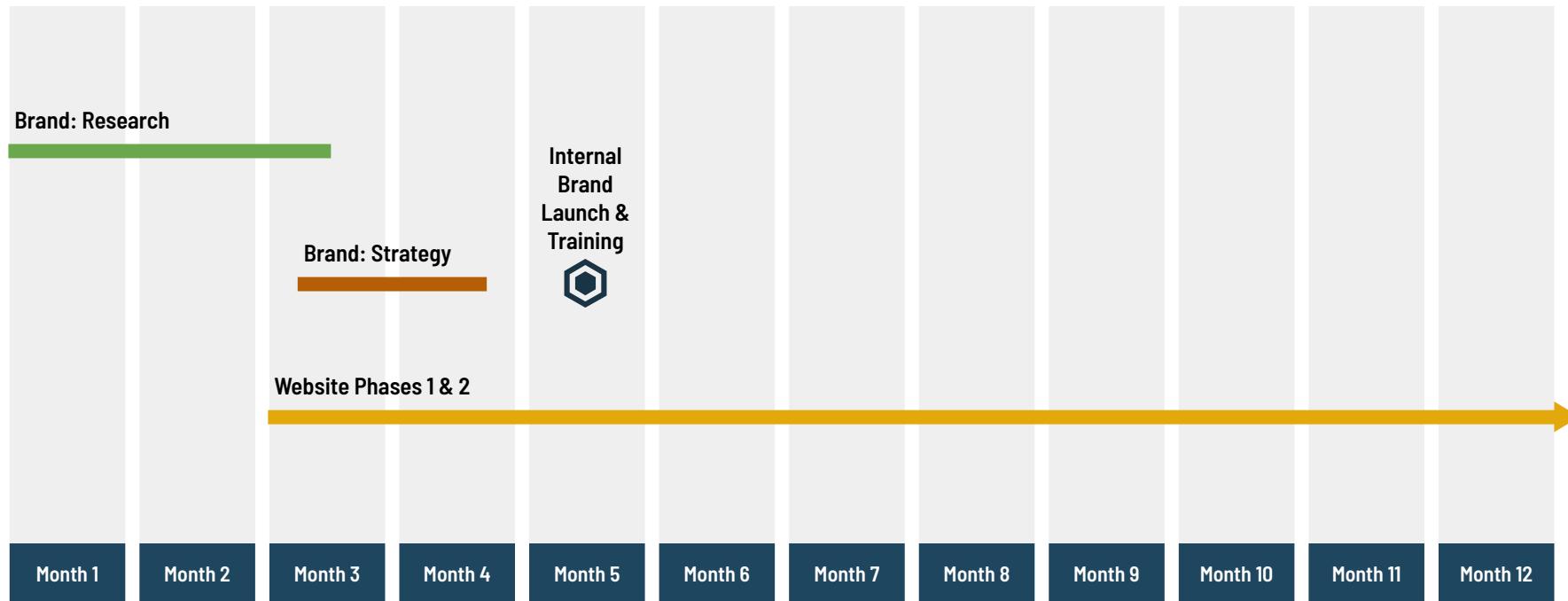
# Custom Option A: Compressed Timeline

Custom Option A could also occur via a compressed timeline as seen below. Pros: All of the robust deliverables from Custom Option A but it would be completed months earlier. Cons: Additional costs would be incurred to revise the web after the brand strategy and campaign concept have been finalized.



# Custom Option B: Timeline

Custom Option B is shown in the timeline below. Due to the limited scope, multiple timelines are not needed. Pros: Because Carnegie will not be performing a visual audit or creating any messaging or campaign concepts, web design would be based on brand strategy alone and both projects would be completed in the shortest period of time. Cons: This means the creative work shown on the other timelines would need to be performed internally by the UP staff outside of the scope of this project.



# Proposed Budget

We have an integrated set of solutions for you that will specifically address each of your outlined goals and objectives.

# Custom Solution A: Proposed Budget

Service	Scope of Work Summary
<b>Discovery &amp; Executive Interviews</b>	At the onset of the project the Carnegie team, led by its strategists, will review recent research provided by the client as well as lead a series of virtual executive interviews revealing valuable insights, history, and context. This positions the project team with a foundational understanding of recent research outcomes as well as any related dynamics as the team engages in our work together. 5 executive interviews (30-45 mins in length)
<b>Internal Brand Consensus Research</b>	Anchoring your reputation research are live, interactive workshops involving students, faculty, staff, administration, alumni, and the community. The workshops uncover the brand personality of the institution—its traits, faults, archetypes, and cause—and the language that most deeply resonates with its core sense of Self, as described by internal stakeholders. <i>6 workshops *Add additional workshops at \$7,400 per two workshops</i>
<b>External Perception Research</b>	Quantitative survey of external audiences: prospective students, parents, academic influencers such as guidance counselors and teachers, as well as the general public. Survey to include evaluation and ranking of familiarity, reputation, and personality expression. <i>14 questions; 3 Designated Market Area (DMA) or region; up to 900 completed surveys</i>
<b>Competitive Brand Analysis</b>	Investigation of your competitive set, examining positioning and storytelling tactics, language themes, tone, style, visual identity, technical considerations, realities, and quality rankings. Insights will reveal opportunities to differentiate from the competition. <i>6 competitor profiles</i>
<b>Brand Positioning &amp; Story Development</b>	A data- and strategy-driven Brand Personality will be developed based upon insights from discovery, reputation research, and stakeholder intel. This Brand Personality provides an actionable reputation strategy that enables an organization to communicate its story in ways that position the institution above the competition and elevate its reputation over time. Rooted in the established Brand Personality, a high-level emotive storytelling narrative will be developed to provide direction for the institution to communicate with its audiences. This provides a foundational road map for consistent brand expression.
<b>Internal Brand Training</b>	To inspire, instruct, and empower institutional stakeholders, on-campus presentations of the Brand Research and Positioning Strategy and Story Development, followed by Message Trainings to train all faculty, staff, and administrators on how to execute the Brand Personality and Storylines in their specific area.

*Brand Subtotal: \$ 162,980 + approved travel expenses  
Custom Option A investment continued on next page*

# Custom Solution A: Proposed Budget (continued)

Service	Scope of Work Summary	Cost
<b>Visual Identity Audit</b>	We'll conduct an audit of your existing visual identity system and make recommendations for any potential evolutions and enhancements to support the new brand positioning.	\$12,750
<b>Brand Creative Concept</b>	We'll provide an enterprise-level brand creative concept that speaks to the university's multiple audiences in a bold and timeless way. It will include a core theme, storytelling arc, design and photography style, and a suite of seven sample canvases to illustrate brand expression.	\$70,000
<b>Messaging Playbook</b>	A companion to our campaign concept work, this highly tactical messaging framework demonstrates successful application of your brand personality to communications with your priority audiences. For each of your specific audiences, we'll provide a key positioning statement and content samples. Our scope of work includes up to three audiences, three discovery sessions in total, and a 12-page final document. We've also built in up to two rounds of revision before final approval of the messaging guide.	\$14,500
<b>Brand Standards</b>	One brand standards document laying out and defining essential brand rules and guidelines for the existing logo. We work with you to organize and clarify visual/verbal standards as well as explore and redefine specific applications and lock ups. Our guide will include up to 28 pages, inclusive of re-exploration of up to two of the following categories: typography, primary/secondary/tertiary color palette, unit lock-ups, iconography, tone and style guidelines, photography guidelines. Our scope of work includes two rounds of revision. We can expand the guide to include additional categories in four-page increments for each category.	\$35,000
<b>Custom Option A Total Investment:</b>		\$295,230 +approved travel expenses

Continued on next page

# Custom Solution B: Proposed Budget

Service	Scope of Work Summary
<b>Discovery &amp; Executive Interviews</b>	At the onset of the project the Carnegie team, led by its strategists, will review recent research provided by the client as well as lead a series of virtual executive interviews revealing valuable insights, history, and context. This positions the project team with a foundational understanding of recent research outcomes as well as any related dynamics as the team engages in our work together. 5 executive interviews (30-45 mins in length)
<b>Internal Brand Consensus Research</b>	Anchoring your reputation research are live, interactive workshops involving students, faculty, staff, administration, alumni, and the community. The workshops uncover the brand personality of the institution—its traits, faults, archetypes, and cause—and the language that most deeply resonates with its core sense of Self, as described by internal stakeholders. <i>6 workshops *Add additional workshops at \$7,400 per two workshops</i>
<b>External Perception Research</b>	Quantitative survey of external audiences: prospective students, parents, academic influencers such as guidance counselors and teachers, as well as the general public. Survey to include evaluation and ranking of familiarity, reputation, and personality expression. <i>14 questions; 3 Designated Market Area (DMA) or region; up to 900 completed surveys</i>
<b>Competitive Brand Analysis</b>	Investigation of your competitive set, examining positioning and storytelling tactics, language themes, tone, style, visual identity, technical considerations, realities, and quality rankings. Insights will reveal opportunities to differentiate from the competition. <i>6 competitor profiles</i>
<b>Brand Positioning &amp; Story Development</b>	A data- and strategy-driven Brand Personality will be developed based upon insights from discovery, reputation research, and stakeholder intel. This Brand Personality provides an actionable reputation strategy that enables an organization to communicate its story in ways that position the institution above the competition and elevate its reputation over time. Rooted in the established Brand Personality, a high-level emotive storytelling narrative will be developed to provide direction for the institution to communicate with its audiences. This provides a foundational road map for consistent brand expression.
<b>Internal Brand Training</b>	To inspire, instruct, and empower institutional stakeholders, on-campus presentations of the Brand Research and Positioning Strategy and Story Development, followed by Message Trainings to train all faculty, staff, and administrators on how to execute the Brand Personality and Storylines in their specific area.
	<b>Custom Option B Investment: \$ 162,980 + approved travel expenses</b>

# Your Brand Leadership Team

We've assembled a team from multiple disciplines to work with you to ensure a seamless experience throughout each phase of work. From the Client Success Director providing strategic direction to the Account Manager keeping day-to-day tasks on track, and all the subject matter experts in between – one team, your team.

## Meet Your Leadership Team



**Melissa Vangsness**  
SVP, Strategy

**Persona**

The Independent and Resilient Contender



With over a decade in the industry, Melissa Vangsness has an exceptional passion for elevating brands and has gained recognition for her ability to move organizations forward. Known for her relentless work ethic, she is a fearless champion of everything she does. After relinquishing her post as Director of Communications and Marketing at the University of Minnesota, Morris, Melissa is now using her expertise at Carnegie to guide clients through research, strategy, creative, and strategic marketing. She holds a bachelor's degree from North Dakota State University and a master's in Strategic Communication from Concordia University, St. Paul.



**Voltaire Santos Miran**  
EVP, Creative

**Persona**

The Passionate and Charming Aficionado



Voltaire joined the Carnegie team in 2021 when the company acquired mStoner, a web development and technology agency for higher education that he led as CEO and Head of Client Experience for more than 20 years. He spent the first decade of his career in development and alumni relations, working on print publications, alumni magazines, capital campaigns, and website launches. His expertise in information architecture, content strategy, and governance moves institutions from a project mindset to a process mindset, with powerful results.



**Ian Strawn**  
Senior VP, Creative

**Persona**

The Wise and Compassionate Impresario



A former worldwide exhibiting fine artist, Ian Strawn now plies his creative talents in the oversight of Carnegie's multimedia designers, producers, directors, artists, and technicians. A graduate of Brigham Young University, Ian is now a 15-year veteran of the creative marketplace. He has served in the capacity of designer, strategist, marketing director, art director, creative director, and start-up entrepreneur. Ian applies a unique mix of both creative thinking and analytical strategy, pushing each project to the most on-brand outcome.



**Jared Brickman**  
SVP, Research

**Persona**

The Creative and Analytical Theorist



Jared Brickman considers himself a true data nerd. With a decade of research experience in communication technologies and campaign studies, Jared is practical, focused, and driven by the compelling stories found underneath the numbers. He has won local, national, and international awards for his overall research on mobile health, viral web content, and online social support. He is also an active member of the research review community and is an upcoming member of the editorial board for the peer-reviewed journal *New Media and Society*.

# Partner Success Stories: Brand

We've selected case studies that highlight work similar in scope to the solution we are proposing.



CARNEGIE



# The Grainger College of Engineering

UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN



## + Brand Personality

Our partnership began with multiple workshops among Grainger stakeholders, including a competitive analysis, and market perceptions. The research culminated with an authentic and engaging creative concept that was fulfilled in multimedia, digital, and print to distinctly position their brand personality across channels.

# WE SOLVE PROBLEMS *first*





BECAUSE MARS WON'T EXPLORE ITSELF

From the oceans of Earth to the skies of Mars, Grainger engineers find solutions that improve lives, protect our planet, and fuel the human need to explore.

We tackle every problem by asking, "what's the human impact?" Sometimes we become astronauts or engineer vehicles that drive and fly on Mars. Sometimes we build solar cars, craft solutions to save our coral reefs, and make breakthrough discoveries in cancer research.

We solve problems because the right solutions save lives, build societies, and preserve our planet's health.

**The Grainger College  
of Engineering**  
UNIVERSITY OF ILLINOIS SPRINGFIELD



CARNEGIE

## + The Results: We Have Lift-off

Driven by Carnegie's Archetypal model and brand strategy, Grainger now has the tools needed for authentic brand expression and reputation building across channels—social, digital, among audiences, stakeholders, and more. The college continues to build rankings and enhance its reputation among peers and is armed with a brand strategy that is authentic and advantageous for telling its story.



The brand anthem video we produced for Grainger won a 2023 Platinum Viddy and two 2023 Gold Telly Awards. Watch it now at:  
<https://vimeo.com/742779934/c2609aa2eb>.

## WE SOLVE PROBLEMS *together*



RISHI MOHAN, INDUSTRIAL ENGINEER

Current team director of operations, Rishi Mohan has seen first-hand how collaborative environments like the Siebel Center for Design (SCD) at UI can make solving problems much more efficient. "We bring engineering-focused multidisciplinary design to a space that's perfect for just that, and SCD provides unparalleled access to collaborative spaces and resources that help an engineering team like

- + Carnegie also created engaging landing pages that incorporate Grainger's brand personality by showcasing narratives that place their most valuable assets; its students and their accomplishments, at the forefront.

*"Having a strong partnership yields great creative outcomes, which is something we have found with Carnegie. Being a large college, we needed a robust team who could move on multiple different fronts simultaneously."*

**Libby Kachich**  
Assistant Dean for Marketing & Communications

A large, stylized bulldog logo in shades of blue and grey, facing right and standing on its hind legs.

CARNEGIE



Samford  
University®



## The Challenge

**Samford University, a Christian liberal arts higher education institution in Alabama, sought to conduct research and collect data on which to build a brand strategy.**

Additionally, there was an expressed need to create alignment between the University's athletic and academic visual identities. Samford long felt its athletics logo didn't feel "right," but they weren't sure why. At a broader level, Samford sought fresh data to support a new reputation strategy that would align departments and project a consistent message to the market.

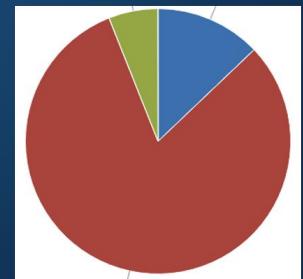
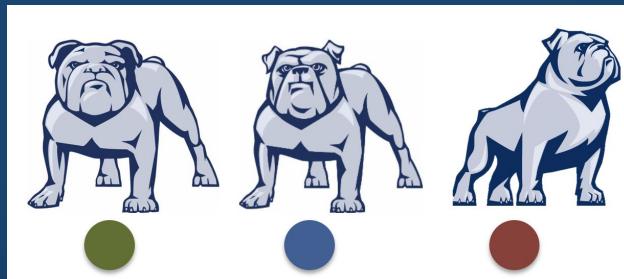


## + Intel at Qual

Campus community participation was a key process goal and provided valuable insights. We tested directional sketches very early in the process. Students astutely observed that a leader should neither wear a collar nor sit. If their brand were to represent a leader, they would stand at the ready and be led by no one else.

## + Clear Path at Quant

After some refinement, we brought mid-process illustrations to market quantitative testing to verify that the design would convey leadership and athleticism. The results were unmistakable.





## Color Formats

Our brandmarks may be expressed in a limited number of color variations for long-term consistency. These options are provided here.

As demonstrated, our brandmarks may exist on three background colors—all of which are official colors in our palette. Note that these color formats apply to both the full signature and the Sam-dot mark when it is used separately. Do not attempt to colorize any elements within our brandmarks in contrast to the standards represented here.

When printing communication products, always request a proof and compare the result against Pantone® color matching system.  
When using digital files, be aware that color modes, profiles, hardware, and file types will influence color accuracy.



# CARNEGIE

## Brand Identity

## + Control with Standards

An identity without governance is chaos. As soon as the mark was finalized, we developed brand standards to give structure to launch the new bulldog mark.

CARNEGIE



## + We Have Lift-off

The entire campus embraced Samford's new bulldog with great enthusiasm and pride. It's become a symbol of the noble leader that lies at the heart of Samford's brand personality.

CONCEPT 1



CONCEPT 2



CONCEPT 3



CONCEPT 4



CARNEGIE

## + Logo Refinement

Samford also asked us to help them evolve their institutional logo. We refined their primary mark by removing extraneous details, simplifying lines, and emphasizing the interplay of light on the tower's facade and steeple. We then created a range of concepts that incorporated new typefaces, their shield, and the U letterform to represent University.

# PUSH YOUR LIMITS

Athletic Growth. Personal Growth.

"Samford pushes you to your limits. When I return to play with my national team in South Africa, I can see how I've grown as a soccer player. In the past I've skated by on my talent. But at Samford we're taught that it's not talent but mentality. It's working harder today than you did yesterday every single day."

"The best part of playing soccer at Samford has been finding my identity in Christ. I know that sounds strange: you'd think it would be winning. But growing as a person has truly been the most important."

—Jermaine Seoposenwe

**Jermaine Seoposenwe**  
**SOCCER**

*Senior*  
Marketing

Competed in the 2010 Olympic Games  
South African National Soccer Team Member  
2016 SoCon Champion

Our collateral, web, and digital work for Samford the noble leadership values that drove the redevelopment of their mascot.

# SAMFORD

## A Tradition of Bulldog Excellence

**Samford Athletics**  
Samford's 17 NCAA Division I teams are a rich part of our community's tradition of training for excellence and gathering to celebrate achievement. Current students, alumni and community members come together to tailgate before big games, cheer on teams with a legacy of 34 championships since 2008 and deepen Samford family camaraderie.

**Bulldog Club**  
The Bulldog Club gives members a chance to support Bulldog athletics and be a part of both premium game day hospitality and reserved parking. Information is available at:  
205-726-4307 or [bulldogclub@samford.edu](mailto:bulldogclub@samford.edu).

**Samford Fans Reward Club**  
Take advantage of the exclusive SAM Fan Rewards App! Check in at events, earn points and get rewarded! Download today for your Apple or Android device.

# ATHLETICS

## Fight Song

Fight, fight, fight,  
For Samford Bulldogs,  
Go onward to victory.  
Oh, we'll wear the red and blue,  
Samford, we're all for you . . .  
And we love you, too!  
Fight, fight, fight,  
For Samford Bulldogs,  
Go onward to victory.  
Oh, we'll give a cheer or two,  
Samford, we're all for you . . .

**Teams**

**Men's Sports**  
Basketball  
Baseball  
Cross Country  
Football  
Golf  
Tennis  
Track & Field

**Women's Sports**  
Basketball  
Cross Country  
Golf  
Soccer  
Softball  
Tennis  
Track & Field  
Volleyball

# CARNEGIE

## BE THE BEST

**Tray Oates**  
**POLE VAULT**  
*Senior*  
Foods and Nutrition

2010 US Olympic Trials  
2010 USFCCC All-American First Team  
NCAA Outdoor Championships 7th Place

**Your Best is Harnessed Every Day.**

"Everyone is there to support you. Going into NCAA championships, I hadn't done my best, but my coach kept pushing me. I had the entire athletic department out there cheering me on when I finally qualified for the championships. No matter what sport you play the entire campus is behind you."

—Tray Oates

17 Division I sports  
5 current NFL players  
NCAA Division I national champion  
31 conference championships since 2008  
98% graduation rate among athletes

[samford.edu/1841](http://samford.edu/1841)

# References

We've provided a list of clients who have worked with us on similar brand projects.

# References

## Libby Kacich

Assistant Dean for Marketing &  
Communications

**The Grainger College of Engineering at the  
University of Illinois**

306 Engineering Hall MC 266  
1308 West Green Street  
Urbana, IL 61801

217.244.4255  
[lkacich@illinois.edu](mailto:lkacich@illinois.edu)

**Scope of Work:**

Our work with Grainger included brand personality, creative campaign development, collateral, web content development, photography, and videography.

## Jason Black

Vice President for Enrollment  
Management

**Samford University**

800 Lakeshore Drive  
Birmingham, AL 35229

205.936.2441  
[jjblack@samford.edu](mailto:jjblack@samford.edu)

**Scope of Work:**

Over several years, our work with Samford has spanned our full creative portfolio of services, including brand personality, athletics logo development, institution logo assessment and refinement, creative blitzes, campaign development, collateral, digital content, photography, microsites, and student search campaign emails.

## Jay Gonzalez

President

**Curry College**

1071 Blue Hill Ave.  
Milton, MA 02186

617.333.2229  
[jay.gonzalez@curry.edu](mailto:jay.gonzalez@curry.edu)

**Scope of Work:**

Curry College has partnered with Carnegie on a variety of projects from research to brand personality, logo development, campaign development, and multimedia production. Jay Gonzalez, their newest president, recently unveiled the new college logo during his inauguration dinner.

# About Carnegie

# Comprehensive Services

We can meet you wherever you are in your journey. Consider our team an extension of your own — focused on your needs, dedicated to your success.

## BRAND STRATEGY

Carnegie's original psychometric model and brand reputation strategy allow us to do more than just create a brand for your organization.

## DIGITAL MARKETING

We bring advanced strategies to showcase your brand to the world. Above all, we tailor the plans for you: your audience, your institution, your goals.

## ENROLLMENT STRATEGY

Our approach to enrollment marketing success is to uncover and interpret intelligent, market-driven, student-centric data and then leverage its findings to execute customized strategies for your institution.

## FINANCIAL AID OPTIMIZATION

We deliver individualized financial aid strategy—not only customized for your institution, but customized for each student.

## INTEGRATED RESEARCH

Our cutting-edge, proven methodologies give you the game-changing insights needed to transform your enrollment, marketing and branding, and communications outcomes.

## LEAD GENERATION

CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.

## MARKETING STRATEGY

Colleges and universities must place more attention on reputation management and marketing strategy as evolving, competitive dynamics further impact higher education.

## PERSONALITY ASSESSMENTS

CarnegieChem, our carefully designed suite of personality assessments and tools, reveals human personality and performance factors in an entirely new way.

## SIGNATURE CREATIVE

By defining what sets you apart and by learning what will speak to your audiences, we create impactful messaging that builds reputation and forges powerful connections.

## SLATE OPTIMIZATION

Our Slate Optimization team saw the industry need and met it. We're transforming the higher education landscape by leveraging the power of Slate—one project at a time.

## STUDENT SEARCH

Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals.

## WEBSITE DESIGN AND DEVELOPMENT

We design websites for colleges and universities that are alive and persuasive—congruent with campus voices and integrated within your marketing ecosystem.

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# CARNEGIE

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[info@carnegiehighered.com](mailto:info@carnegiehighered.com)