A meeting of the Committee on Outreach, Development, and Community Relations was held on September 17, 2015, in Room 102 of the Penn Stater Conference Center Hotel, University Park, at 10:00 a.m.

The following committee members, constituting a quorum, were present: Chair Ryan McCombie, Betsy Huber, Bob Jubelirer, Anthony Lubrano, Luke Metaxas, Kay Salvino, Paul Silvis, and Robert Tribeck. Emeriti committee members David Jones and Joel Myers were also present.

The following staff members, constituent representatives, or invitees were also present: Eric Barron, Jennifer Blew, Michael DiRaimo, Rod Kirsch, Shawn Lichvar, David LaTorre, Lawrence Lokman, Laura Pauley, Kevin Steele, and Craig Weidemann. The meeting was called to order by Chair McCombie, and roll was taken. The minutes from the previous committee meeting were approved unanimously.

Rod Kirsch, along with Keith Cook and Michael Degenhart from the Office of Planned Giving, gave a presentation about capturing bequest expectancies in the next campaign. Michael Degenhart discussed the national demographic trends, planned giving model, and their predictions for membership of the Atherton Society. Keith Cook presented objectives, planning, and execution of the Office of Gift Planning’s bequest initiative. (See Appendix I)

Mike DiRaimo provided an update on State and Federal relations. Margaret Gray gave a presentation regarding Local Government Community Relations, as well as the mission and strategic goals for the newly formed Office of Local Government and Community Relations. Margaret also provided a report on the history of Town and Gown relations and its evolution over time due to changes in local government jurisdictions, as well as Penn State’s expansion. (See Appendix II)

Craig Weidemann provided an update on Outreach and Online Education, as well as their strategies to recruit military students to the World Campus. The World Campus has grown by 14% within the last year, military students comprised 27% of that figure. (See Appendix III)

Kevin Steele, President of the Penn State Alumni Association, gave an update on the Alumni Association’s activities, as well as a report on the diversity of the PSAA’s award recipients. (See Appendix IV)

Lawrence Lokman gave a presentation on the Identity of Penn State and the impact of the new logo. The logo will hopefully create brand consistency among the University’s many entities. (See Appendix V)

Lawrence also discussed the 2015-2016 Strategic Communications priorities and the role of Strategic Communications and Branding Initiatives. (See Appendix VI)

Chair McCombie opened up a discussion regarding the Outreach, Development, and Community Relations Committee’s operating guidelines, and commissioned Anthony Lubrano to head a task
force to update the operating guidelines to reflect the goals of the committee more accurately. Topics of discussion for future committee meetings were also discussed.

Chair McCombie adjourned the meeting at 11:57 a.m.

Respectfully submitted,

Holly N. Brown
Administrative Support Assistant
Office of the Board of Trustees
Capturing Bequest Expectancies in the Next Campaign – The Good, The Bad and The Surprising

Presentation to the Board of Trustee Committee on Outreach, Development, and Community Relations

Thursday, September 17, 2015

Michael Degenhart, Assistant Vice President
Keith Cook, Director of Gift Planning
The Good – National Demographic Trends

Population trends: Births

Charitable estate beneficiary among U.S. population aged 55+ with a will or trust

Increasing charitable planning among those with a will or trust
The Good – National Demographic Trends

Charitable estate beneficiary among U.S. population with a will or trust by age segment

U.S. population aged 55+ use of funded trust by age segment

Increasing charitable planning among those aged 55-64 with plans

Increasing use of trusts, especially among those aged 75+
The Good – Penn State Planned Giving Model

- We have 12,914 individuals (11,710 alumni and 1,204 friends) coded as prospects “Most Likely” to make a planned gift in our Planned Giving Model who will be at least age 60 by 6/30/22.

- This is roughly 5.56% of our Alumni and Friends with current addresses in our database that meet that age criteria.
## The Bad – Performing at the Mean Benchmark

<table>
<thead>
<tr>
<th>TOTAL BEQUEST EXPECTANCIES (#) (2009 to 2013)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>-----------------------------</td>
</tr>
<tr>
<td>Florida</td>
</tr>
<tr>
<td>Illinois</td>
</tr>
<tr>
<td>Ohio State</td>
</tr>
<tr>
<td>Penn State</td>
</tr>
<tr>
<td>Toronto</td>
</tr>
<tr>
<td>UCLA</td>
</tr>
<tr>
<td>Virginia</td>
</tr>
<tr>
<td>Washington</td>
</tr>
<tr>
<td><strong>Public Mean</strong></td>
</tr>
<tr>
<td><strong>Private Mean</strong></td>
</tr>
<tr>
<td><strong>Source:</strong> Self reported</td>
</tr>
</tbody>
</table>
| **Note:** UCLA does not track the number/dollar amount of expectancies.
## The Bad – Performing at the Mean Benchmark

<table>
<thead>
<tr>
<th>Institution</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Mean</th>
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<td>$36,482,111</td>
<td>$28,575,246</td>
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<td>Penn State</td>
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<tr>
<td>Toronto</td>
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<td>$48,434,846</td>
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<tr>
<td>UCLA</td>
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<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
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<tr>
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## The Bad – Performing at the Mean Benchmark

<table>
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<tr>
<th></th>
<th>Frontline Fundraiser FTE</th>
<th>Bequest Expectancies (#)</th>
<th>Bequest Expectancies ($)</th>
<th>Bequest Expectancies per Frontline Fundraiser FTE (#)</th>
<th>Bequest Expectancies per Frontline Fundraiser FTE ($)</th>
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<td>$22,374,853</td>
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<td>Illinois</td>
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<td>84</td>
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<td>41</td>
<td>$12,560,699</td>
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<tr>
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<tr>
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<td>102</td>
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<td>UCLA</td>
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<td>n/a</td>
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<td>n/a</td>
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<tr>
<td>Virginia</td>
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<td>40</td>
<td>$18,763,000</td>
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<tr>
<td>Washington</td>
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<td>159</td>
<td>$21,329,200</td>
<td>28</td>
<td>$3,709,426</td>
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<tr>
<td>Public Mean</td>
<td>3.6</td>
<td>114</td>
<td>$44,309,781</td>
<td>34</td>
<td>$13,825,823</td>
</tr>
<tr>
<td>Private Mean</td>
<td>4.1</td>
<td>65</td>
<td>$28,434,916</td>
<td>16</td>
<td>$8,627,357</td>
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</table>

Source: Self reported

Note: UCLA does not track the number/dollar amount of expectancies.
The Surprising – How to Capture Bequest Expectancies in the Next Campaign

- Have a distinct participation goal for the Atherton Society within a comprehensive campaign – the “Bequest Challenge”

- Increase the number of known bequest intentions by 75% - 100% depending on campaign length

- Currently 1,958 Atherton Society members

- Goal 3,500 – 4,000 Atherton Society members by campaign end
Our Objectives with a Bequest Initiative

- Increase and broaden participation
- Reach out and engage new prospects
- Increase Awareness
  - Who should leave a bequest
  - How to make a bequest
  - What is the impact
Planning our Bequest Initiative

- Who do we need to influence
- Making strategic allies out of colleagues
- Campaign branding and messaging
- Consistency
- Tools for increasing efficiency
- Paper vs. web vs. electronic (multichannel marketing)
Executing the Bequest Initiative

- Build a solid bequest intention base
- Initiate a broad general marketing outreach to all prospects
- Ensure the response mechanism are simple, user friendly, and not perceived as too invasive of privacy
- “Inreach” – equipping fellow development officers to effectively solicit and properly record new bequest intentions
Executing the Bequest Initiative

- Utilizing new print and web resources we will condense our communication schedule into strategic campaigns.

- Capitalize on the basic and tested marketing tenets of repetition and frequency.

- This sequence involves using a variety of channels and materials to increase awareness of the targeted message and an offer to respond to the marketing piece.

- By highlighting the message through repetition, the donor is effectively informed of the importance of the message being shared.
Example of a Strategic Campaign

- Newsletter with reply card and URL to landing page (16,500)
- eNewsletter with direct link to landing page form (unlimited)
- QuickCard with reply card and URL to landing page (16,500)
- eQuickCard with direct link to landing page form (unlimited)
- Online Wills Planner and Online Participation Survey
- All marketing pieces direct readers to a landing page with a form to request follow-up information
Questions, Thoughts or Comments
Office of Governmental Affairs – Local Government & Community Relations

- Why a local government/community relations component?
- Local government defined
- University units with local government and community relations interaction
- Long term issues
- Next steps
Mission

The Local Government and Community Relations component of the Office of Governmental Affairs serves as a dedicated University resource to promote and support strategic and coordinated engagement with local governments and community organizations.
Strategic Goals

- To develop and **enhance the University’s relationships** with local government agencies and officials, community organizations and constituencies, and local businesses and business associations.

- To **maintain an awareness and understanding** of programs, issues, and activities across the University that involve local governments, community organizations, and businesses.
Strategic Goals

- To promote **mutually beneficial outcomes** on University and community related initiatives.

- To **facilitate strategic and coordinated campus responses** to local governmental and community public policy issues promoting alignment with University priorities and Federal and State initiatives.
Early days of ‘Town and Gown’ Relations
Centre County

Local Government & Community Relations
University Park
Voluntary association of municipal governments:
1. State College Borough
2. College Township
3. Halfmoon Township
4. Harris Township
5. Ferguson Township
6. Patton Township

- Established 1969 to provide cost effective and high quality public services –
- Eliminates and reduces duplication of services and promotes regional planning.
- Service area is about 150 square miles with a population of 94,000 residents (2014) including 46,000 students.
- All elected officials of the six municipalities comprise COG – 32; PSU non-voting member
- Code administration, emergency management, land use and infrastructure planning, oversight of regional fire agencies, regional refuse/recycling, Act 537 sewage facilities plan, and regional parks and recreation facilities.
“Local Government”

- Centre County
- 5 municipalities – UP Campus
  - Borough of State College
  - College Township
  - Ferguson Township
  - Patton Township
  - Benner Township
- Centre Region Council of Governments
- Authorities
- State College Area School District
Community Relations

- Human services agencies such as the YMCA
- United Way
- Downtown Improvement District
- Neighborhood Associations
- Central Pennsylvania Convention & Visitors Bureau
- Centre Region Chamber of Business and Industry (CBICC)
- Economic development organizations (CREN)
The University and Local Government/Community Relations

- Office of the President
- Research
- Outreach
- Provost - Academic Affairs
- Intercollegiate Athletics
- Finance & Business
- Student Affairs
Overarching & Long-Term Issues

- University growth – student enrollment
- Neighborhood preservation and safety / Student Housing
- Campus Master Plan – infrastructural impacts
- Financing of services
- Vitality of downtown and Centre Region business community and economic development
Next steps

- Continue relationship building
- Facilitate contact and communication between University leaders and local gov’t/community representatives
- Formulate information sessions and presentations highlighting issues such as student enrollment and updates on ‘Invent Penn State’
- Develop University administrative policy/guidelines – similar to AD50
UPDATE FOR COMMITTEE ON OUTREACH, DEVELOPMENT, AND COMMUNITY RELATIONS

September 17, 2015

Craig Weidemann | Vice President for Outreach | Vice Provost for Online Education
INITIATIVES
AND MILESTONES

1. World Campus Military Strategy and the Marine Corps Recruit Depot Classroom Dedication

2. The Penn State Center: Engaging Pittsburgh
18% of World Campus enrollments are active military or veteran students.

World Campus has the largest population of veteran students across all campuses with 1,917 students.
US NEWS & WORLD REPORT RANKINGS

Best Online Programs—Military and Veterans
No. 1 Bachelor’s Programs
No. 4 Graduate Education
No. 4 Graduate Computer Information Technology
No. 4 Graduate Business
No. 4 Graduate Engineering
While overall World Campus enrollments have grown by 14% so far this year ...
Military enrollments have grown by 27%
Furthering our commitment to military students and their families and enhancing their access to education.
US Army
Sergeants
Major
Academy

Master of
Education in
Adult
Education to
20 selected
fellows
Initiative to include honor cords for all military and veteran students and faculty during commencement
World Campus: “Serving those who Serve”

- Professional development course for teaching military students
- A dedicated military team
- A dedicated academic advisor, disability liaison, and prospective student coach
Penn State and World Campus have several programs in place to enhance affordability: the Yellow Ribbon Program, Military Grant-In-Aid, and military scholarships included.
Marine Corps Recruit Depot in San Diego

Penn State’s first on-base military classroom
There are 55,000 military personnel within 15 miles of the Marine Corps Recruit Depot.
The Penn State Center: Engaging Pittsburgh

The Energy Innovation Center

OUTREACH AND ONLINE EDUCATION
Pittsburgh at a Glance

- Over 2.3 million people in the metro area
- Metro area is home to 2500+ private foundations
- Tech companies including Google, Uber, Aquion Energy, ModCloth, and more
College of Agricultural Sciences

Extension

Outreach and Online Education

Allegheny County
Roughly 300 people attended the open house on September 2.
Bringing engaged scholarship and applied research to the heart of Pittsburgh
IMPACT

Engaged Scholarship

Economic Development

Expanded Access

OUTREACH AND ONLINE EDUCATION
Engage, empower, and inspire global learners. Every day. Everywhere.
Update from the Penn State Alumni Association
Kevin Steele, President

To: Board of Trustees Committee on Outreach, Development, and Community Relations
Sept. 17, 2015

• **Enhancing Diversity through Volunteer Leadership**—Our strategic plan calls for us to focus on increased diversity among our volunteer leadership, particularly as it relates to our governing board. This summer, we constituted our FY2015-16 Executive Board, which includes new members and returning leaders from diverse backgrounds, professional experiences and Penn State perspectives. Specifically, the Executive Board comprises 29 percent alumni of color; 52 percent age 40 and below, 38 percent between the ages of 41 and 60, and 10 percent over 60 years of age; and 39 percent non-Pennsylvania residents. Overall, this year’s Alumni Council membership composition is as follows: 16 percent alumni of color; 62 percent men and 38 percent women; 41 percent age 40 and below, 48 percent between the ages of 41 and 60, and 10 percent over 60 years of age; and 33 percent non-Pennsylvania residents.

Additionally, the Alumni Association places emphasis on diversity and inclusion of underrepresented populations as it relates to our awards and recognition programs. The chart attached with this report outlines five-year diversity results for the Alumni Fellow, Honorary Alumni, and Alumni Achievement Award programs.

• **Alumni Fellow Award 2015**—The Alumni Association will honor 19 very distinguished alumni Oct. 21 with the lifelong title of Alumni Fellow, which recognizes outstanding professional accomplishments. Alumni Fellow is the highest award given by the Penn State Alumni Association. Since the award was established 42 years ago, only 769 alumni—out of more than 645,000 living alumni—have been honored as Alumni Fellows, including this year’s class. A list of this year’s recipients is attached.

• **Search Progressing for New Chief Executive Officer**—The search process is continuing for the 11th leader of the Penn State Alumni Association. We are working with the executive advancement and development search firm Lois L. Lindauer Searches LLC of Boston. Rod Kirsch is leading the search team and will be interviewing semi-finalists later this month, with finalist interviews expected to follow in October.
# Penn State Alumni Association Recognition Program Diversity Results

## ALUMNI FELLOWS

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Awards</th>
<th>Women (including Minority and International Women)</th>
<th>Minority and International Males</th>
<th>White Males</th>
<th>Total %, Women and Minority</th>
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<tbody>
<tr>
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<td>24</td>
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<td>18</td>
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<td>7</td>
<td>69</td>
<td>35%</td>
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## HONORARY ALUMNI

<table>
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<th>Year</th>
<th>Total Awards</th>
<th>Women (including Minority and International Women)</th>
<th>Minority and International Males</th>
<th>White Males</th>
<th>Total %, Women and Minority</th>
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<td>5YR</td>
<td>23</td>
<td>5</td>
<td>3</td>
<td>15</td>
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## ALUMNI ACHIEVEMENT (35 AND UNDER)

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<th>Year</th>
<th>Total Awards</th>
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<th>Minority and International Males</th>
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<th>Total %, Women and Minority</th>
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<tr>
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## TOTALS

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<td>184</td>
<td>56</td>
<td>17</td>
<td>111</td>
<td>40%</td>
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*Note: All results are based on calendar year data.*
THE 2015 ALUMNI FELLOWS

LISA BAIRD ’82, ’84g
Chief Marketing Officer, United States Olympic Committee

WANDA J. BLANCHETT ’97g
Dean and Distinguished Professor, Graduate School of Education, Rutgers University

MITCHELL D. COHEN ’81
Vice Chairman, PwC

JACQUELYN S. FETROW ’86g
Provost and Vice President for Academic Affairs, University of Richmond

MARK A. FOCHT ’83
First Deputy Commissioner, Philadelphia Parks and Recreation

BRIAN S. FUNKHOUSER ’80
President and Chief Executive Officer, Buchart Horn, Inc./BASCO Associates

BRUCE A. GRAY ’80
Senior Vice President, Bank of America Merrill Lynch

JEROME S. GRIFFITH ’79
President and Chief Executive Officer, Tumi, Inc.

NAREN GURSAHANEY ’83
President and Chief Executive Officer, The ADT Corporation

LINDA VERBA HOFMAN ’71
Head of Service Strategy, TD Bank

KEITH R. KARAKO ’76
Global Head of Trade Finance, CitiBank

LISA MILES ’91
Senior Vice President, Investor Relations and Corporate Communications, MAXIMUS, Inc.

STEPHEN D. MILLER ’69, ’73g, ’75g
Professor of Microbiology-Immunology and Director
Northwestern University Immunobiology Center

RONALD W. POLICE ’82
Senior Vice President, SAP National Security Services

RUSSELL C. REDDING ’82, ’98g
Secretary of Agriculture, Commonwealth of Pennsylvania

STEVEN K. RICHARDS ’84
President and Chief Executive Officer, Mood Media Corporation

JOAN A. ROBBINS ’71
President, Talent Relations, Entertainment Studios

SCOTT M. SMITH ’85, ’90g
Nutritionist, Manager for Nutritional Biochemistry, NASA

ROSACLARA SOLINES STROH ’79g
Vice President and Treasurer, The Hershey Company
Identity Update

Lawrence H. Lokman
Vice President for Strategic Communications
September 18, 2015
Identity Chaos

Examples of colleges, schools, centers, institutes identifiers

- Penn State Science
- Penn State College of Communications
- Penn State College of Nursing
- Penn State Department of Art History
- Penn State Institute for CyberScience
- Stuckeman School
- Penn State College of Liberal Arts
- Penn State Smeal College of Business
- PENN STATE Center for Food Manufacturing
- PENN STATE College of Education
- PENN STATE Larson Institute
- PENN STATE Schreyer Honors College
- PENN STATE College of Engineering
- PENN STATE College of Medicine
- PENN STATE Hershey Eye Center
- PENN STATE Hershey Bone and Joint Institute
- PENN STATE Hershey Melanoma and Skin Cancer Center
- College of Earth and Mineral Sciences
Identity Chaos

Penn State Berks retweeted
PSU Identity Svs @PSUIdentity · Aug 25
It’s a new semester, so it’s a great time to do what you can to protect your password. See our Facebook page: on.fb.me/1WQ1I4j

Penn State Berks retweeted
Penn State TLT @psult · Aug 18
Recently, Grobman’s @PennStateBerks students explored local Civil Rights history #TLTFellows bit.ly/1K3BS7R

Penn State Libraries @psulibs · 8h
All the more reason to play #whereisitwednesday -- and go see @psutheatre students' great work!

Penn State retweeted
Penn State Research @PSUresearch · Aug 25
Penn State researcher helps out on blocking practice, but it’s practice for blocking pathogens. goo.gl/4g5co7

PSU Concerts @PSUconcerts · Aug 24
Announcing: @TheChainsmokers this Friday at the HUB presented by @psu_spa. FREE for all students. Welcome back !!

#NationalDogDay - In connection w/ Clifford the Big Red Dog on 10/18, we're collecting donations for @CentreCoPAWS!

Penn State Center for the Performing Arts updated their cover photo.
12 hrs · Edited · 
Identity Chaos

Color Matters
Identity Chaos
Color Matters
Launch Progress:
Lockups Completed and Distributed

17 academic colleges

22 campuses

Administrative units
lockups underway
Launch Progress:
Letterhead, Envelopes, Business Cards

Updated formats are available at Multimedia and Print Center. Email stationery@psu.edu
Launch Progress:
Websites Updated with New Identity
Launch Progress:
Websites Updated with New Identity

abington.psu.edu

comm.psu.edu
Launch Progress:
Social Media Avatar Examples

Twitter

#PSUArrival

Facebook

Penn State

Colleges & University

#PSUArrival

541,146 people like this.

226,673 people have been here.

Penn State added 5 new photos.

Cool, quiet third day of classes here at University Park. The weather brought students out for lunch, quiet time and meeting up with friends.

Visit Penn State on Instagram.
Launch Progress:
Online Identity Manual

Online identity manual (with downloads) available by late October.

A preview of identity standards will be shared by September 25.
Marc Brownstein is an alumnus and president and CEO of Brownstein Group, a Philadelphia brand and advertising, public relations and social media enterprise. He authors a column for Advertising Age. Jordan Rednor is an alumnus and co-founder and partner of Protagonist LLC, a New York brand strategy and advertising agency.
"A good identity like this one will succeed over time. We know this through experience.....This evolution better captures and conveys the pride and confidence of being a Nittany Lion. And kudos to the university for seeing the need for it, involving hundreds of Penn Staters in the process, and doing it right."
Outreach Committee

2015-16 Strategic Communications Priorities
September 17, 2015
Work the Pyramid

**SELECT INITIATIVES**
- Launch campaigns
- Exploit opportunities
- Scale based on goals

**ALIGN TOOLS, CONTENT**
- Audit communications
- Align key vehicles

**BUILD THE FOUNDATION**
- Define goals & audiences
- Benchmark/track progress
- Create message, visual identity
It’s About Opportunity

• Higher levels of excellence than rankings would indicate

• Passionate community

• Opportunity to align with leadership priorities

• Opportunity to coalesce disparate parts
We Have Some Balancing To Do

- Enrollment
- Issues Mgt
- Image
- Media
Role of Strategic Communications

“Promote Penn State as a top tier university, strengthening its reputation in regional, national and international spheres of influence and support, in ways that serve university recruitment, resource and leadership goals.”
Benefits of Strategic Program

• Reputation growth
• Revenue development
• Increased value of degree
• Recruitment of top-tier candidates
• Fulfillment of leadership priorities
Key Priorities

• Build out visual identity
• Continue enrollment campaigns
• Continue Polaris 2.0
• Expand leadership communications
Key Priorities

- Build upon message & research foundation; benchmark progress
- Leverage power of alumni base
- Align with fundraising campaign priorities
Key Priorities

• Expand targeted media placements
• Brand presidential priorities
• Launch new brand initiative(s)
• Create, leverage opportunities
Brand Presidential Priorities

The aim of “Invent Penn State” is to drive job creation, economic development and student career success by connecting researchers with the people who can help bring their discoveries to the marketplace. This will benefit the communities we serve and the innovators working among us. Penn State is developing a culture that encourages, nurtures and rewards entrepreneurship—not just in STEM, but in the arts, health and human development, education, and more.

http://inventpennstate.psu.edu
Tap Into Our Powerful Network

- Facebook: 359,134
- LinkedIn: 345,934
- Twitter: 104,918
- Google+: 60,696
- Tumblr: 49,965
- Instagram: 43,500
- Vero: 7,100
- YouTube: 5,316
- Pinterest: 1,798
Thank You! Questions?