

A National Marketing Study and Strategy for Wofford College

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## Executive Summary

Until the mid-1970s, colleges and universities in the United States were not exposed to many competitive threats since higher education was experiencing rapid growth, little public criticism existed, and financial support was abundant. In the 1990s, threats to higher education began to multiply, in the form of lack of stability, uncertain financial strength, faculty behavior, globalization, and growing public criticism and dissatisfaction (Keller, 1997). Today, the American system of higher education is experiencing a trend of intense competitiveness, which is being driven by new and compelling forces. In past generations, competition within higher education has been somewhat minimized via traditional and governmental regulation. However, in the last two decades there have been steady shifts within the higher education community toward greater competition with less dependence on regulation and more dependence on or recognition on market forces (Newman & Couturier, 2001).

Wofford College boasts a strong and positive reputation within South Carolina, but regional and national visibility remains elusive for the small, private liberal arts college. For instance, Fall 2011 enrollment of 446 students included 249 native South Carolinians (56% of total enrollment) and only 26 of the 446 students came from states outside of the Southeast (Wofford College, 2012). Fall 2012 enrollment of 439 students demonstrated an improvement in students hailing from outside of South Carolina, with 52 percent (227) of students coming from other states—the first time in the school’s history that this has occurred (Lister, 2012). However, the administration recognizes that in order for Wofford to compete in the growing marketplace of higher education, Wofford has to transform from the pride of South Carolina to a nationally recognized liberal arts college destination.

In response to Wofford's desire to expand its regional and national reach and recognition, the Capstone team devised three study questions to help identify traits and trends of Wofford's current student population to inform future recruitment and admission efforts. Study Question 1 sought to uncover what type of student is attracted to Wofford in order to provide a targeted audience for marketing and to attempt to identify any predictors of enrollment. Though the Capstone team failed to uncover any statistically significant predictors of enrollment, the team did identify certain traits and trends that seem to have a positive effect on whether or not a student chooses to enroll. Strong academic preparation, legacy status, and private school attendance were traits that seemed to indicate a propensity for attendance at Wofford.

Study Question 2 sought to identify Wofford's main competitors in the higher education market. Both quantitative and qualitative data were used in identifying the school's competitors. The National Student Clearing House identified Wofford College's top five competitors as Clemson University, the University of South Carolina (USC), Furman University, the College of Charleston, and Presbyterian College.

Study Question 3 sought to distinctly identify target areas where Wofford could concentrate its recruitment and admissions effort through a marketing process known as geodemographics. This approach identified several characteristics that seem to lend themselves toward a decision to attend Wofford. Access to the college and proximity to Spartanburg proved to be effective indicators identifying willingness and propensity of students to enroll. In addition, the team's geodemographic analysis uncovered the importance of locating students (and parents) who truly value the Wofford experience and concomitantly have the ability to finance that experience.

The Capstone team, at the request of Wofford, provided a marketing strategy that incorporates many of the team's findings in a tangible and realistic approach to augmenting their reach and recognition.

## Introduction to Wofford College

Seventy-five years to the day after the signing of the Declaration of Independence, William Wightman, professor, journalist, and future Bishop of the Methodist Church, spoke to a crowd of four thousand as Masons laid the cornerstone of what was to be Wofford College (Wofford.edu, 2013). In his address, he attempted to define the uniqueness of this new place of higher learning, saying “It is impossible to conceive of greater benefits— to the individual or to society— than those embraced in the gift of a liberal education, combining moral principle ... with the enlightened and cultivated understanding which is the product of thorough scholarship.” In doing so, upon a ridge overlooking the sleepy village of Spartanburg, South Carolina, he lit a path of intellectual and moral enlightenment that continues to be the bedrock of the Wofford experience.

Seven students and three faculty members comprised the first members of the Wofford community in the fall of 1854 (Wofford.edu, 2013). True to its liberal arts foundations, those first students were required to display proficiencies in the Classics, as well as math, geography, and the English language. Only the crème de la crème were selected for the first enrollment as is evidenced by the career of their first graduate. Samuel Dibble, who claimed the title of Wofford’s first graduate in 1856, went on to become a United States Congressman.

What began so humbly as a handful of students and even fewer faculty has blossomed into a current enrollment of just under 1600 students and 136 full-time teaching faculty that offer degrees in no less than twenty-five major fields of study. Though its boasted numbers are exponentially larger, Wofford’s beginnings as a liberal arts institution of higher education are still seen in its curriculum, its concentration on undergraduate students, and the dedication of its

faculty. Professor K. D. Coates summed up Wofford's intent to remember its historical legacy, when he stated at the Centennial celebration of the college in 1954, "Somehow, in spite of all the complexities, the individual student still manages to come in contact with the individual teacher. And occasionally too, as in the old days, a student goes out and by words and deeds makes a professor remembered for good intentions, and a college respected for the quality of its workmanship" (Wofford.edu, 2013).

### Problem Statement

Wofford College boasts a strong and positive reputation within South Carolina, but regional and national visibility remains elusive for the small, private liberal arts college. As previously mentioned, Wofford's Fall 2011 enrollment of 446 students included 249 native South Carolinians (56% of total enrollment), and only 26 (5.8%) of the 446 students came from states outside of the Southeast (NCES, 2012). Fall 2012 enrollment of 439 students demonstrated an improvement in students hailing from outside of South Carolina, with fifty-two percent (227) of students coming from other states (see Table 1), the first time in the school's history that this has occurred (Lister, 2012). However, the administration recognizes that in order for Wofford to compete in the growing marketplace of higher education, the college has to transform from the pride of South Carolina to a nationally recognized liberal arts college destination.

	Final 2009	Final 2010	Final 2011	Final 2012
Enrolled From South Carolina	239 (61%)	242 (56%)	249 (56%)	212 (48%)
Enrolled From Out-of-State	153 (39%)	189 (44%)	197 (44%)	227 (52%)
Number of States Represented	24	21	27	27
Foreign Countries Represented	5	4	5	3

**Table 1: Geographic Distribution Data 2009-2012**

Students from South Carolina are undoubtedly academically strong and make generous contributions to the life and experience of Wofford College. However, having such a high percentage of students from one state is not optimal for several reasons:



- It prevents the message of the quality of a Wofford education from national and international exposure.
- It puts undue financial pressure on the college, already dependent on eighty-two percent of its operating budget from tuition, to live within the means of its primary market. At this time, Wofford's annual tuition of \$44,475 (Wofford College, 2013) is slightly below the state's median household income of \$44,587 (U.S. Census Bureau, 2013).
  - "The average tuition costs now equate to nearly 40% of the median family income in the United States, up from about 23% in the early part of the last decade" (Selingo, 2013).
  - Wofford is not alone in tuition dependence. Many colleges have a critical interest in defining and enrolling its share of the undergraduate market (Drewes & Michael, 2006).
- It creates a southern, more specifically a South Carolinian, college experience/orientation. This is not bad in itself, except that such a strong regional affiliation may discourage academically qualified students from other regions of the country from seeking to learn more about the unique educational experience Wofford provides.
  - Put another way, a southern experience, while treasured by many students and a common descriptor used by students in our qualitative interviews, is not specifically part of the mission of Wofford College:

Wofford's mission is to provide superior liberal arts education that prepares its students for extraordinary and positive contributions to society. The focus of Wofford's mission is upon fostering commitment to excellence in character, performance, leadership, service to others and life-long learning. (Wofford College, 2013)

"The student body is heavily from South Carolina and surrounding states and, as such, is rather homogeneous and conservative. The white, upper middle class fraternity or sorority member from a conservative, southern home is alive and well at Wofford." (Peacock Nine, 2012)

"Four years at Wofford would be akin to jumping in a time machine and spending one's undergraduate years in the pre-Civil Rights-era South." (Peacock Nine, 2012)

- Having a strong regional affiliation can be good for identity. However, it also potentially limits the footprint of the alumni pool, which limits financial donations and an expanded network to assist recent graduates with employment and admissions with sharing the message of Wofford's academic excellence to prospective students.
- The growth and long-term continued success of the college are potentially constrained by continued reliance on South Carolina as a source for students. Wofford cannot move itself, so it must expand its applicant footprint and enroll students who can afford to attend and value the education Wofford provides.

Wofford College enlisted the help of a Capstone team from Vanderbilt University's Peabody College to make recommendations for a strategic marketing plan to enhance and augment regional and national visibility. In approaching the Capstone team, Wofford College provided the following six suggestive steps for developing a comprehensive strategic marketing plan:

- Gain a solid understanding of Wofford's culture, assets, and programs
- Examine the effectiveness of current marketing efforts
- Identify key geographic areas as target markets
- Craft a central message and define specific strengths
- Recommend a strategic marketing plan for implementation
- Provide evaluation methods for recommended plan

### **Study Questions: An Overview**

In analyzing the aforementioned suggestive steps provided by Wofford and recognizing the institution's main goal in acquiring a coherent and effective strategic marketing plan, the Capstone team developed a set of three study questions to aid in formulating such a plan:

*Study Question 1: What type of student is attracted to Wofford?*

This question aims to determine what demographic and trait characteristics are prominent among students who attend Wofford in order to tailor a strategic marketing plan to a specified target audience. The question also serves to help the Capstone team gain a solid understanding of Wofford's current culture, assets, and programs.

*Study Question 2: Who are Wofford's main competitors?*

The aim of this question is to help the college further the context in which it is currently operating, allowing the institution to more acutely address the effectiveness of its current marketing efforts and distinguish its greatest strengths in comparison to its main competitors.

*Study Question 3: What are Wofford's target geodemographic markets?*

This question builds upon the results of the prior two questions and utilizes current marketing theory to construct a cutting-edge and data-driven geodemographic analysis for the institution.

The results of each of these three questions were then used to create an informed marketing plan to enhance and augment the regional and national visibility of the institution. Of note, while the Capstone team utilized each of the college's six suggestive steps in developing the requested strategic marketing plan. The Capstone team decided not to attempt the creation of a central message for the college due to such an action's integral place in branding, as opposed to a marketing campaign. It was therefore decided that the creation of a central message duly fell beyond the scope of the current project.

### **Study Question 1: What type of student is attracted to Wofford?**

In order to provide Wofford with an effective strategic marketing plan, it is imperative that the Capstone team and the institution first understand the traits and characteristics of its target audience, in this case its students, in order to identify those populations who possess a greater propensity for enrollment and to reach those populations with targeted marketing efforts.

In an age of hyper-competitive recruiting and a saturated marketplace, students are undoubtedly consumers faced with a myriad of choices. Utilizing data from their extensive study of college-bound students in Australia, Baldwin and James (2000) concluded that students should be viewed as informed consumers who make rational choices about which institutions they attend, reinforcing the concept of higher education as a service industry and justifying the use of business marketing practices in the higher education marketplace. However, this view of the current higher education sector is not without its critics. Barrett (1996) said woefully, "It is both regrettable and ominous that the marketing focus, explicitly borrowed from business, should be accepted and even welcomed." Even today, discussion involving the relationship between institutions and students (and subsequently their parents) creates contention within the industry, fueled by political, economic, and philosophical overtones and idealisms.

Nonetheless, this reality is clear and present and reinforces the need for colleges and universities to have a thorough and complete understanding of the traits and characteristics that define its population, in order to construct an effective and targeted marketing approach that appeals to those individuals who are most likely to enroll.

### **Methods for Study Question 1**

With regards to analyzing relevant data to answer study question 1, a combination of quantitative and qualitative approaches were utilized to analyze the data provided by Wofford College. Students' experiences are highly individualized and the qualitative method of inquiry was well suited to uncover unique perspectives (Patton, 2002). Concomitantly, the Capstone team collected a plethora of quantitative data to uncover the current trends, perceptions, and realities of the Wofford population.

#### *Data Collection Strategies*

The Capstone team relied on several different data collection strategies to inform study question 1. These collection strategies included interviews, admissions data, and the results of a logistic regression.

#### *Interviews*

The Capstone team conducted standardized open-ended interviews (see Appendix A) on October 8, 2012, utilizing an interview protocol with Wofford College personnel: twenty undergraduate students in multiple academic disciplines, five administrators, and four faculty members. This standardized approach was utilized to increase the comparability of responses, ensure the most complete data possible for each of the interviewees, reduce interviewer effects and bias, and permit readers to see and review the instrumentation used in the evaluation. The

intent was to triangulate the various responses from multiple data sources on the same themes to obtain a more holistic picture to reduce the threats of validity and/or reliability.

Questions were divided into five subsets for students and administrators/faculty and are as follows: Wofford College's Main Competitors, Students Attracted to Wofford College, Wofford College's Advantages/Strengths, Wofford College's Marketing Efforts, and Wofford College's Geographic Targets. Two of the five subsets of questions were specifically utilized for Study Question One: Students Attracted to Wofford College and Wofford College's Advantages/Strengths. Each interviewer of the Capstone team interviewed a minimum of six students to maximize the time on campus and the number of potential respondents. Interviews were recorded with the permission of the interviewees to ensure accuracy of data and interested reader evaluation.

By interviewing students and faculty/staff, the researchers were able to delve deeper into students' perceptions of their experience. Undergraduate students (e.g. freshmen, sophomore, juniors, and seniors), as well as faculty and staff, were a sample of convenience identified by Wofford's admissions office as individuals who most closely represent the "Wofford experience". Sixty-seven percent (n=20) of interviewees were students, (White [75%], African-American [10%], Hispanic/Latino [10%], and Asian-American [5%]) representing the diversity of the student population and thirty-three percent (n=9) were administration, faculty and staff. The Capstone team conducted the in-person interviews with each subject for an average of 30 minutes.

### *Data Sources*

The Capstone team relied on a robust admissions data set when analyzing what type of student is attracted to Wofford College. Admissions data from 2009-2012 provided by the admissions department was used to analyze student characteristics and annual trends.

A note on admissions data from 2008: The economic recession of 2008 has often been described as the worst in national history since the Great Depression of the 1930's, and indeed higher education has not been immune from its far-reaching effects. In an *Inside Higher Ed* survey conducted in January and February of 2011, college and university presidents from across the nation (n=956) identified the recent economic decline as their number one cause of concern, manifesting itself in related worries such as budget shortfalls, rising tuition costs, and increased competition for students (Jaschik & Lederman, 2011).

Based on several interviews with Admissions/Enrollment Management professionals in higher education, the Capstone team has elected to remove the applicant year 2008 from analysis due to the recession that began in 2008 and its direct impact on family financial reserves. It is important to remember that applicants for the class entering in the fall of 2008 applied during the fall of 2007. Lehman Brothers declaration of bankruptcy, the unofficially recognized start of the recession, was on September 15, 2008, after the class entering in 2008 had enrolled and before the class that would enter in Fall 2009 would likely have applied for admission. Given this clean break point, the Capstone team is attempting to reduce issues of economic instability, which could possibly skew the data between the applicant class of 2008 and those of 2009-2012 by excluding the Fall 2008 data from review.

Financial aid data provided by Wofford supports this change in family financial resources. The Expected Family Contribution (EFC) of incoming student's families dropped by

\$3,254 for the 2009-10 academic year and an additional \$5,711 for the 2010-2011 academic year while the tuition Wofford charged at that same time increased by \$2,925 (Wofford College, 2013). This indicates a significant change in the economic resources of the families considering Wofford College, reinforcing the decision to drop the data from the period just prior to the recession from our review. Applicants between 2009 and 2012 applied during the recent recession and under similar circumstances, reducing the impact of economic instability over this window.

### *Data Analysis*

#### *Interviews*

Upon completion of the recorded interviews along with hand-taken notes, the Capstone team employed the “matrix method” in analyzing the data (Smrekar, 2011). First, the Capstone team jointly constructed a matrix that reflected the primary themes and concepts imbedded within the interview questions. Space was provided within the matrix to record emerging themes and key quotes from subjects interviewed.

Second, the Capstone team listened to each of the recorded interviews they had conducted (divided evenly between the three members of the team) to gain familiarity with the content of the data. Next, the Capstone team listened to each of the interviews a second time to ascertain additional detailed notes about the substance of the dialogue with the interviewees. Then the team members, utilizing their notes and the recorded content of the interviews, identified the key concepts and themes that were brought forth from the interviewees and



recorded these observations into the aforementioned individualized matrices for each of the interviewees. The names of the interviewees were changed to protect their identity.

Finally, the Capstone team synthesized the individual matrices into two “master matrices”, one for students and one for administration/faculty (see Appendix B). Each of the “master matrices” was crosschecked with the individualized matrices by each member of the Capstone team to ensure accuracy of content and expression. Once completed, the “master matrices” were used as the integral evidence for conclusions drawn from the interviewees regarding the factors that affect marketing issues pertaining to Wofford College.

### *Logistic Regression*

Due to the categorical nature of the variables and the anticipated bivariate outcome (i.e., whether or not a student enrolls in Wofford College), the Capstone team ran a logistical regression in SPSS with a series of variables acquired from a standard protocol that Wofford College uses for admissions purposes to determine if any of those variables could predict a student’s enrollment at Wofford. Those variables included high school GPA (adjusted for standardization purposes), courses taken, admissions essay, and activities/involvement high (see Table 2 below), and were chosen for inclusion by the Capstone team because of their standardization among students in the sample and their pre-existing utilization in determining whether or not a student should be admitted (and then ultimately enrolled) to Wofford. While these variables comprise the college’s “standard protocol” in evaluating applicants and is therefore specifically useful to the institution, the logistic regression did not incorporate variables found in existing literature on college choice and attendance because of a lack of complete data that addresses those variables (e.g., parental education, habitus, socio-economic status, etc.)

(Perna, 2006; Hossler, Schmit and Vesper, 1999). This lack of complete data is unfortunate and constitutes a significant study limitation which will be acknowledged later in this study.

Application Score GPA is scored between 0 and 15. A student with a 2.0 high school GPA will receive a 0 while a student with a 4.0 will receive 15 points towards admission.

Application Score Courses is scored between 0 and 15. A student can earn more points in this area by taken more College Prep (CP), Advanced Placement (AP) or completing the

International Baccalaureate program. Application Score Essay is scored between 1 and 9 with an excellent essay receiving a nine and poor essay gaining one point. Application Score Activities

is a scoring system where Wofford tries to value student activities and leadership in high school.

Students can receive between 0 and 9 points.

**Table 2: Results of Logistic Regression**

		B	S.E.	Wald	Df	Sig.	Exp(B)
Step 1 <sup>a</sup>	AppScoreEssay	.008	.026	.088	1	.767	1.008
	AppScoreGPA	.001	.010	.003	1	.959	1.001
	AppScoreActivities	-.001	.025	.001	1	.976	.999
	AppScoreCourses	-.012	.010	1.490	1	.222	.988
	Constant	-1.033	.167	38.363	1	.000	.356

a. Variable(s) entered on step 1: AppScoreEssay, AppScoreGPA, AppScoreActivities, AppScoreCourses.

### Findings for Study Question 1

Unfortunately, as seen in Table 2 above, the logistical regression did not produce any statistically significant results, and therefore no variable can definitively be said to be a

predictor of enrollment (i.e., a trait that predicts attraction of a student to Wofford). While the logistic regression produced no significant results, the interview process did reveal certain traits and characteristics that appear to define substantial portions of the student population.

#### *Academic Preparation, Leadership, and Involvement*

A strong academic prowess is a cornerstone of both students and faculty at the college, an integral part of the Wofford experience. Multiple interviews confirmed this finding. When students were asked about the level of academic preparation needed to succeed at Wofford, responses centered around the themes of strong academic preparation and integration.

“I’ve raised myself to a higher standard and that’s why I ended up being here [at Wofford].” -  
-John, student

“Wofford professors don’t want to know if you know the material, they want to know if you can apply the material.” --Mary, student

“There are no “fluff” classes at Wofford.” --Ashley, student

When asked about student preparation and academic integration, faculty and staff reaffirmed the existence of these overarching themes.

“We have small classes, engaged learning, great outcomes. Wofford has an authentic and caring environment, where you will get a great education if you apply yourself. By the time they get to us, we’re just that type of school.” –Professor George, faculty

“I think students are choosing us primarily for the preparation we can give them academically, for the academic experience, and I think the faculty are our greatest asset [in this endeavor].” –Dr. Jones, staff

Previous studies have indicated that strong academic preparation and academic involvement are traits which most successful college-bound students possess. Perna’s (2004) research demonstrated that a rigorous high school curriculum positively influences college

enrollment. This academic preparation may be predicted and measured in a number ways. For instance, Hossler, Braxton, and Coopersmith (1989) identified through their review of literature that college enrollment rates are augmented for high school students who participate in academic or college preparatory tracks than for those who don't. Adelman (1999) found that the highest level of coursework completed in particular subject matters (especially math) can be an important predictor of academic preparation.

Multiple studies suggest that students with greater academic achievement are more likely to attain a host of college-related outcomes, including expectations to attain higher levels of education (Hossler and Stage, 1992), enroll in either a two-year or four-year college or university (Ellwood and Kane, 2000), and enroll in a high-cost institution (Hearn, 1988). Table 3 below shows certain academic and leadership characteristics of students who have enrolled in Wofford over the past four years (Wofford College admissions data, 2012), revealing that Wofford's current student population supports the findings of previous studies regarding academic preparation and involvement and a host of college-related outcomes.

**Table 3: Characteristics of Enrollees  
(Wofford College admissions data, 2009-2012)**

Program	Median four year percent of entering first year students
Palmetto Scholar	22%
National Honor Society	43%
Beta Club	32%
1 <sup>st</sup> Decile of their graduating class	38%
High School sports team captain	40%
Signed Athlete	16%

While there is likely some overlap in these areas (Palmetto Scholars may also be in the National Honor Society and/or captain of a sports team), the overall picture of enrolling students is one of strong academic credentials and involvement in leadership activities. While none of these criteria turned out to be predictors of enrollment at Wofford (this information was not provided on an individual student level, but was provided as a gross figure for the incoming class), they do provide a partial picture of the type of individual who might ultimately be a student who chooses the Wofford experience. For example, while Wofford cannot predict that a Palmetto scholar will enroll, Wofford can make sure that Palmetto Scholars are aware of the Wofford experience and how that experience can benefit a student.

The Palmetto Fellows Scholarship is a merit-based program established in 1988 to recognize the most academically talented high school seniors and encourage these students to attend college in the State. The Palmetto Fellows Scholarship Program is administered by the South Carolina Commission on Higher Education. Palmetto Fellows may receive up to \$6,700 their freshman year and up to \$7,500 for their sophomore, junior and senior years (South Carolina Commission on Higher Education, 2012).

State policies towards education have been shown to impact students' decision to specific types of colleges (Braxton, 1990) and twenty-two percent of the students who enrolled at Wofford over the past four years are Palmetto Scholars (Wofford College admissions data, 2009-2012). By encouraging academically talented students to enroll in the state, the program aids Wofford in attracting academically gifted students while also working against Wofford's intentions to increase its profile outside of South Carolina. This is in effect a good problem to have, and research has supported the fact that academically strong students seek academically rigorous programs to attend and place

academic rigor above cost as a search factor (Astin & others, 1980; Keller & McKewon, 1984; Litten, 1983).

Additionally, research shows that in states with generous state scholarships, like the Palmetto Scholarship, students are more likely to attend private colleges in that state if there are many private colleges in that state (Zemsky & Oedel, 1983). There are many private colleges in South Carolina, although few known to be as academically rigorous as Wofford. This means that Wofford is competing directly with multiple private college for instate students and that the Palmetto Scholarship actively encourages that competition.

The Palmetto Scholarship can also be a challenge to Wofford. South Carolina's state colleges, already identified as primary competitors (Clemson University, University of South Carolina, and the College of Charleston) also benefit from these scholarships, meaning that for students looking for the least expensive education (the kind of education that the popular press values based on return on investment) the state system is a better investment of their time and resources. This fact means that Wofford loses academically strong students to larger in-state public universities (Keller & McKewon, 1984), but is likely in a better position to retain academically strong students (Chapman & Jackson, 1987) who are looking outside of the state of South Carolina where they will not get the Palmetto Scholarship.

*Being a Legacy*

Another factor that was not shown to be a predictor of enrollment, yet is likely a major factor in a student's decision to enroll at Wofford, is being a legacy (see Table 4). Golden (2006) found that legacy enrollment is utilized by a number of private and public institutions in place of merit enrollment for a substantial number of students. For instance, according to Larew (2003) legacy enrollments make up "10% to 15% of most Ivy League schools' freshman classes each year." While the use of legacy enrollment can have positive effects for admissions, it has been the subject of some controversial review as well. Coe and Davidson (2011) point to the fact that over-use of legacy enrollment can lead to social stratification, negatively affecting other worthy institutional goals like diversity and institutional tolerance.

In the case of Wofford, the college collects data from the applicant pool to determine if a student is "alumni related". Specifically this means the student is related to a Wofford alumni by one of the following: Great-Great-Great Grandfather, Great-Great Grandfather, Great Grandfather, Grandparent, Father, Mother, Brother, Sister, Other (Aunt, Uncle, Cousin). As Table 4 below demonstrates, the enrollment rate for legacies is substantially higher than that of non-legacies. In addition, the acceptance rate for legacies is higher and the rejection rate for legacies is lower than non-legacies.

**Table 4: Legacy Enrollment  
(Wofford College admissions data, 2009-2012)**

	Legacy	Not a legacy
All Apps	1012	4308
	19%	81%
Accepted	931	3780
	92%	88%

Denied	82	529
	8%	12%
Enrolled	363	967
	39%	26%

*Public versus Private School Attendance*

The majority of students enrolling at Wofford over the past four years are graduates of private high schools (see Tables 5-7 below).

**Table 5: Public School versus Private School Attendance  
(Wofford College admissions data, 2009-2012)**

Metropolitan Area 2009-2012 Enrolled Students	Public School	Private School	Percent of enrolled students from this region who attended a private high school.
Chicago	3	5	63%
New York/Newark, DE	5	7	58%
DC Region (VA/DC/MD)	24	34	59%
Orlando	18	27	60%
Nashville	27	37	58%
Dallas	15	12	44%
Minneapolis	6	6	50%
Cincinnati (OH/KY)	38	16	30%
Philadelphia	4	9	69%

This is important because Wofford's gross applicant data from 2009-2012 indicates that over thirty-two percent of the incoming class graduated from private high schools (Wofford College, 2013). Clearly, if the overall enrollment at Wofford is thirty-two percent private high school graduates and fifty percent of incoming students reside inside South Carolina; the



students electing to enroll at Wofford from outside of the state are predominantly graduates of a private school education. This is relevant information alone; however, when one reviews national high school data and learns that roughly eleven percent of students in the United States are enrolled in private/independent schools (Council for American Private Education, 2013; National Center for Education Statistics, 2012), evidence that 30-50 percent of students who enroll at Wofford are graduates of private high schools would to the conclusion that private high school graduates strongly value the type of educational experience that Wofford provides. This preference could exist for a variety of reasons. One speculation is that private school attendance provides the same kind of habitus and access to social and cultural capital that the Wofford experience embodies. For instance, McDonough (1997) found that students who possess cultural knowledge that the dominant class deems important have greater access to the resources that encourage college choice. In addition, multiple studies have indicated that possessing strong social capital (i.e., parental involvement and peer support) lead to greater college choice outcomes (Hossler, Schmit, and Vesper, 1999; Gonzalez, Stone, and Jovel, 2003).

Further enhancing the concept of out of state private school students supporting the type of education Wofford provides comes from the primary “feeder schools” for Wofford. These are the schools that provide the majority of the applicants to Wofford each year. While these are applicants, not enrolled students, it is vitally important to recognize that a college cannot enroll a student who does not apply.

Within South Carolina between 2009 and 2012, the following schools provided the most students to Wofford College:

**Table 6: School Pipelines in South Carolina  
(Wofford College admissions data, 2009-2012)**

School	Number of Students Applying
Paul M. Dorman High School	204
Wando High School	122
Spartanburg High School	156
AC Flora High School	110
Lexington High School	107
Boiling Springs High School	100
Irmo High School	94
Spring Valley High School	91

Outside of South Carolina, North Carolina and Georgia, the high schools shown in Table 7 are the dominant feeder schools to Wofford College.

**Table 7: School Pipelines Outside of South Carolina  
(Wofford College admissions data, 2009-2012)**

School, State	Number of Students Applying
Woodberry Forest School, VA	79
Home-Schooled, USA (this is not one school, but is not public school)	75
The McCallie School, TN	55
Episcopal High School, VA	41
Baylor School, TN	28
Webb School of Knoxville, TN	27
Mountain Brook High School, AL	30
St. Christopher's High School, VA	30
Bolles School, FL	22
Girl's Prep High School	20

One significant difference between the schools in these two charts is that in the first group of schools within South Carolina, all of the schools are public. Of the schools outside of South Carolina, North Carolina and Georgia (Wofford's primary applicant footprint), the only public school in the group is Mountain Brook High School in Alabama. The only other outlier in the group is applicants from home schooling environments. While these students are not from a

private high school, these students are more similar to private school students than their public school counterparts.

That students outside of Wofford's immediate vicinity predominantly come from private high school backgrounds is not surprising. Wofford has a reputation for being academically rigorous and according to a 2012 U.S. Department of Education report, private schools are stronger than public schools in the following areas:

- Private school students generally perform higher than their public school counterparts on standardized achievement tests.
- Private high schools typically have more demanding graduation requirements than do public high schools.
- Private school graduates are more likely than their peers from public schools to have completed advanced-level courses in three academic subject areas.
- Private school students are more likely than public school students to complete bachelor's or advanced degree by their mid-20s (U.S. Department of Education, 2012).

It is likely that students who attended a private high school also had smaller classes and had more one on one interaction with their teachers, a benefit that they would value, regardless of the differing research on the effectiveness of educational outcomes based on this data. Most private schools have fewer than three hundred students (Council for American Private Education, 2013). Wofford also provides a similar small class and student to faculty ratio.

### **Summary of Findings for Study Question 1**

While a logistic regression did not reveal any statistically significant predictors of enrollment, interviews of students and faculty conducted at the college, as well as an analysis of Wofford's 2009-2012 admissions data, did reveal certain traits that many Wofford students have

in common. These traits include strong academic preparation, academic and leadership involvement, a prior relationship to legacies of the college, and attendance at a private high school.

### **Study Question 2: Who are Wofford's main competitors?**

The first step of any effective marketing approach consists of a college or university identifying and acknowledging their main competitors before a proper and effective marketing strategy can be implemented. The identification of competitors is a major component of most marketing strategies for several reasons (Clark and Montgomery, 1999). First, competitor identification is a prerequisite to competitor analysis. Once major competitors have been identified, the process of analyzing them for strengths and weaknesses can commence. Second, competitor identification allows for objective research on establishing market structure and boundaries. These newly established market boundaries and structure can assist the institution in addressing specific targeted markets and niches. Third, competitor identification shapes the thought process and mental model of managers as they assess the markets in which they compete. Marketing is not performed in a vacuum, and as such it is imperative that Wofford College thoroughly understands the context of its competitors in order to most effectively utilize a strategic marketing plan.

### **Methods for Study Question 2**

#### *Data Collection Strategies*

The Capstone team relied on two different data collection strategies to inform study question 2. These collection strategies included interviews and data from the National Student Clearinghouse.

### *Interviews*

In addressing study question 2, the Capstone team relied on the same interview collection procedure as mentioned in the data collection of study question 1, utilizing the sub-section “Wofford College’s Main Competitors” in the interview protocol to delineate relevant findings (See Appendix A).

### *Data Source*

Wofford College furnished the team with pertinent data from the National Student Clearinghouse to further support findings. The National Student Clearinghouse is a database that provides education verification and student educational outcomes research for its member institutions and other interested constituents. According to the organization’s website, “More than 3,300 colleges and universities, enrolling over 96% of all students in public and private U.S. institutions, participate in the Clearinghouse. Participating institutions provide access to enrollment and degree information on each of their students. As a result, only the Clearinghouse can offer access to a nationwide coverage of enrollment and degree records — encompassing more than 110 million students and growing” (studentclearinghouse.org, 2013).

## **Findings for Study Question 2**

The results of our qualitative interviews are shown below in Table 8 below.

**Table 8: Wofford College’s Main Competitors as Perceived by Faculty, Staff, Administrators, and Students**

Wofford College Students	Wofford College Faculty and Staff
Clemson University (Pub.) 56%	Furman University(Priv.) 70%
University of South Carolina (Pub.) 28%	University of South Carolina (Pub.) 50%
College of Charleston (Pub.) 22%	College of Charleston (Pub.) 40%
Furman University (Priv.) 22%	Clemson University (Pub.) 40%
Presbyterian College (Priv.) 17%	Presbyterian College (Priv.) 30%
Davidson College (Priv.) 17%	Davidson College (Priv.) 30%
	University of the South (Priv.) 30%

Our findings garnered from the National Student Clearinghouse data match the competitors identified through the interview process. For instance, the top three public higher education institutions and the top two private higher education institutions identified in the National Student Clearinghouse report are the same colleges and universities that are included in the top five competitors of Wofford College according to the interviews we conducted with Wofford's students, faculty, staff, and administrators.

While there is a consensus of the top five competitors of Wofford College utilizing the qualitative and quantitative approaches, the perceptions among the Wofford students and the Wofford faculty, staff, and administrators were somewhat different. For example, the top three competitor institutions identified by Wofford College students during the interviews are public higher education institutions (Clemson, the University of South Carolina, and the College of Charleston). However, the top competitor identified by faculty, staff, and administrators is Furman University, a private higher education institution. In addition, faculty, staff, and administrators identified the University of the South as a top competitor, a finding that did not emerge in either the interviews with students or from an analysis of the National Student Clearinghouse data.

## **Summary of Findings for Study Question 2**

The Capstone team's interviews with students, faculty, staff, and administrators confirmed findings from the National Student Clearinghouse data that Wofford's top five competitors are Clemson University, the University of South Carolina, Furman University, the College of Charleston, and Presbyterian College. In addition, Davidson College and the University of the South emerged from the qualitative data as perceived competitors of the college.

### **Study Question 3: What are Wofford's target geodemographic markets?**

One of the most significant factors in the design of a strategic marketing plan for Wofford College is to determine the geographic location from which Wofford already successfully draws its students. By doing so, Wofford will gain a better understanding of what types of students value the education that Wofford provides. Not every student who is admitted to Wofford elects to enroll at Wofford. Just as there are differences between colleges (research universities, liberal arts colleges, community colleges, etc.) there are differences in students and their desired experience in college and/or desired outcomes from college.

“Recognizing the differences among potential students enables the development of a target marketing approach” (Lewinson & Hawes, 2007) to segment the market between those who place a greater value on the type of education Wofford provides and those who do not have that same emphasis. This is even more vital when one considers that allocation of scarce resources must be taken into consideration to direct allocation to areas of proven significance (Gabbott & Sutherland, 1993; Lewinson & Hawes, 2007; Nicholls, Morgan, Clarke, & Sims, 1995). By identifying traits of the students enrolled already at Wofford, the Capstone team aims

to utilize theory and research that indicates that a school's most likely prospective student will be similar to the types of students already enrolled at the college (Lowry & Owens, 2001; Gabbott & Sutherland, 1993; Lewinson & Hawes, 2007; Tonks & Farr, 1995). This approach, identifying traits of an existing population and profiling that information to be applied to other populations, is called geodemographics.

### *Geodemographics in Higher Education Marketing*

Geodemographic theory offers a strong way to target Wofford's limited resources to achieve its long-term goals. "Geodemographics is the science of profiling people based on where they live. Geodemographic systems estimate the most probable characteristics of people based on the pooled profile of all people living in a small area..." (RDA Research, 2011). While it is true that there are outliers in all groups, geodemographics follows the age-old concept that "birds of a feather flock together" and applies scientific research principles to that concept, with the distinct advantage that "the ability to identify with great precision the geographical location of specified geodemographic audience means that communication with that audience becomes much easier" (Tonks & Farr, 1995, p. 32).

Market segmentation, using geodemographics, would appear to be the most effective way for Wofford to design an effective strategic marketing plan to attract a greater number of students from outside of the immediate region. Market segmentation is the practice of dividing a large group into smaller sub-groups having identifiable objectives, desires, and expectations. Ideally, these are students who are better able to pay Wofford's tuition and are interested in the type of educational experience Wofford provides. "The premise behind segmentation is that while some prospective students share similar characteristic (such as age, gender, or grade point



average), not all students with similar characteristics have the same expectations, goals, or prospects for the future” (Angulo, Pergelova, & Rialp, 2010, p. 1).

In the case of Wofford College, this means reviewing the applicants to the college and determining if there are such identifiable criteria from the application data. “The key to achieving organizational goals rests in determining what the needs and wants of target markets are and delivering the desired satisfactions more effectively and efficiently than competitors” (Kotler, 1986, p. 15). Special focus will be placed on Wofford’s “buyer”: the enrolled student. While it is true that a non-buyer’s desires and objectives are valuable as well, Wofford College offers a unique and defined student experience and has no intention of changing how or what they do to appeal to those who elect to enroll elsewhere. The purpose of this project is to identify those who are potential enrollees given their similarity with current Wofford students and attempt to maximize the effectiveness of Wofford’s marketing efforts by segmenting the market to those who are more likely to enroll at Wofford if admitted based on the assumptions of geodemographic marketing. Indeed, the Peacock Nine market analysis report that Wofford provided shows that the students who elected to attend, and the alumni of the school, are positively disposed towards their experience at Wofford (Peacock Nine, 2012). Wofford’s high freshman to sophomore retention rate of eighty-nine percent and impressive four year graduation rate of seventy-nine percent (Wofford College, 2013) exceed the national averages of sixty-nine percent retention (The College Board, 2012) and of fifty-eight percent graduation in six years (National Center for Education Statistics, 2012).

Angulo et al (2010) have shown that high schools are composed of students with common criteria in their student body that can be identified and utilized by higher education

marketers. “Our results suggest that certain segments are more likely to be found in certain types of high schools” (Angulo, Pergelova, & Rialp, 2010, p. 14). The literature also supports the concept; “the characteristics of enrolled students and recent graduates provide the best indicators of the types of prospective students who will be the most receptive to future marketing initiatives” (Hossler & Bean, 1990, p. 76). By extension, if that data can be identified among Wofford College’s applicant pool, a specific targeting strategy can be designed.

The use of geography as a method of market segmentation will be applied in this situation due to Wofford’s stated intention to diversify their student body to have a more national representation. It is important to note that Wofford’s primary market is students leaving high school and enrolling directly into college; the “traditional” college student: a recent high school graduate, eighteen to nineteen years old, intending to enroll at a residential college for four years. Wofford already uses segment profiling to connect with this group (as opposed to international students, non-traditional students, etc.). Wofford stated intention is to reduce the number of enrolled students from South Carolina while increasing the students from other regions of the country. It is Wofford’s aim to do this without compromising the academic quality of the students enrolled at the college or negatively impacting the college’s impressive retention and graduation rates.

It is the particular challenge in higher education that the product is, “perishable and intangible” (Lewinson & Hawes, 2007, p. 18), thus making designing marketing activities more challenging and emphasizing the need for a strategy to reach the market increasingly important. To achieve this goal, and with recognition that Wofford has limited resources, a segmented

market approach, based on the geographic regions and high schools where Wofford already recruits successfully, is recommended as a course of action.

### **Methods for Study Question 3**

The Capstone team relied on two sources of data when analyzing what attracts students to Wofford College. Admissions data from 2009-2012 was used to analyze student characteristics and annual trends was one source. In addition, the Capstone team relied on a Peacock Nine report provided by Wofford College to supplement quantitative and qualitative findings (See Appendix G). The Peacock Nine report was originally provided to Wofford College by Peacock Nine, a marketing consulting firm based in Chicago Illinois. The firm was engaged by Wofford College and President Benjamin Dunlap in March of 2012 to, “provide the leadership team with unique insights into Wofford College’s key stakeholders that could help inform future marketing and positioning efforts—which is essential “fuel” for Wofford’s continued, positive transformation (Peacock Nine, LLC, 2012, p. 5).” While the report does provide some valuable insights, the Capstone team only had access to the end report and not the data used to construct it. Therefore, the integrity of the methodology nor the integrity of the raw data the report utilized can be guaranteed.

The Capstone team utilized admissions data and Peacock data available to compare trends concerning student characteristics and enrollment decisions between 2009 and 2012. In addition, current Census data and airline information was compared to Wofford’s data sets to augment the team’s geodemographic analysis. Batchgeo.com was used to map the applicant data using the nine digit zip codes provided by Wofford’s applicant data system for accurate mapping. Batchgeo.com is an online mapping tool which takes street addresses, zip codes, or other location based data (GPS coordinates for example) and locates them on a map. Wofford

provided the zip codes for all applicants to the college between 2009 and 2012, allowing the Capstone team to accurately map application and enrollment patterns nationally by identifying clusters of applicants and enrolled students for each year. This allowed the Capstone team to see enrollment trends such as areas with applications to Wofford where students did not ultimately enroll at Wofford versus areas with high applicant volume higher student yield. Public flight records identifying points of origin for direct flights were provided by Greenville-Spartanburg Airport and airline data was compared to the regions identified by the Batchgeo.com data. For our purposes below, only cities with twenty or more direct round trip flights were used to approximate ease of access with nearly one direct flight per day between the student's home metropolitan area and Wofford College.

### **Findings for Study Question 3**

There are three primary findings for study question three: proximity to Wofford, convenience of access to Wofford, and private school educated.

#### *Proximity*

Since 1972, the majority of college bound students have limited their college search and enrollment decision to a 500 mile radius from their home (Cooperative Institutional Research Program, 2012). When the home zip codes of Wofford's enrolled students are located on a map the great majority of the enrolled students fall into this 500 mile radius.

Established scholarly research further supports the concept that students place geographical boundaries in their college search process (Astin et al., 1980; Gilmour et al., 1978; Tierney, 1983). It is vital to point out that geography is not the only factor that students use in

designing a college choice set, and many students do not place it as their number one issue, but it has been found to be a significant factor (among others such as cost, reputation, academic quality, etc.) (Hossler, Braxton, & Coopersmith, 1989).

The map below (Figure 1) shows a 500-mile radius from Wofford College. The radius of 500 miles was selected based on the Student Information Form published by the Higher Education Research Institute at the University of California at Los Angeles. A quick comparison to the previous maps shows a strong similarity to the regions a majority of Wofford College's enrolled students live. In combination with the flight path information, and the predominance of private school students selection of Wofford, it also offers a targeted geographical area to focus recruiting, and potentially questions the efficacy of a significant investment of recruiting resources west of the Mississippi River and north of New York City unless there is direct flight path to that area (such as Dallas).



**Figure 1**

Figure 2 illustrates that the great majority of students enrolling at Wofford between 2009 and 2012 are clustered in the mid-south. This is not surprising given Wofford's reputation as an academically rigorous college with a strong reputation in the region, specifically in South Carolina.



**Figure 2**

Looking beyond the strong cluster in South Carolina, North Carolina, and Georgia, there are clear clusters in the country where students elect to enroll at Wofford. In this image, only eleven students with home addresses west of eastern Texas enrolled at Wofford between 2009 and 2012. This data matches our qualitative interviews where one student from Los Angeles indicated that she had met only one other student from California in her time at Wofford. Additionally, one hundred and sixty-nine students have enrolled from home addresses north of

the North Carolina/Tennessee shared northern border. Considering that between 2009 and 2012, 1,711 students enrolled at Wofford, these numbers reinforce the regionalism of Wofford's program. Between 2009 and 2012, only eleven percent of enrolled students came from a region other than the South.

### *Convenience of access*

Convenience of access represents ease of access to Wofford College from a student's home. Students outside of South Carolina, North Carolina, and Georgia who live in a major metropolitan area with a non-stop flight option to Greenville-Spartanburg International airport make up the greatest number of enrolled students each year between 2009 and 2012. Figure 3 below illustrates this study finding.

When looking at where the students outside of Wofford's immediate vicinity, there are some very specific pockets where groups of students are based (i.e. specific cities reflected on the map). By comparing these pockets to metropolitan areas which offer direct flights to

Greenville-Spartanburg International Airport we find some common locations (see Figure 3).



**Figure 3**

The black lines on the map above identify cities with twenty or more direct flights per month to Greenville-Spartanburg International Airport. These direct flights do not extend beyond cities in eastern Texas and do extend into the north to the major cities where the majority of enrolled students originate. Specifically, the major metropolitan areas with twenty or more direct flights per month to Greenville-Spartanburg International Airport are: Chicago, New York/Newark, Baltimore/Washington, Orlando, Dallas, Nashville, Minneapolis, Philadelphia, and Cincinnati. Clearly, convenience to get to college/proximity to home is a factor in student college selection. This has been previously supported with research (Astin et al., 1980; Gilmour et al., 1978; Tierney, 1983; Hossler, Braxton, & Coopersmith, 1989), although to our knowledge has not been specifically illustrated with flight patterns. Convenience to attend/ease of access poses a particular challenge to Wofford as it is a factor wholly external to the school. This issue



gives the Capstone team specific geographic regions with which to identify schools of origin and perhaps public or private school attendance for prospective students and to determine if there is a difference in enrollment patterns for non-South Carolina residents.

### *Private School Educated*

Graduates of private high schools are more heavily represented in enrolled students at Wofford than are represented in the national average of high school students. This is the case for students from South Carolina and even more so for students coming from outside of South Carolina, a finding that confirms and supports findings from study question 1. Table 9 below illustrates this propensity for private education.

One of the underlying principles of geodemographic marketing is that people of similar backgrounds “flock together” geographically and with the choices they make. From an ability to pay for Wofford, a higher level of family income is needed. In fact, this was an area of particular interest in our initial interviews with Wofford’s senior leadership. A stronger understanding of where enrolled students come from, both geographically and socio-economically would be of great assistance to Wofford; however, Wofford does not specifically gather family financial information in the application for admission. Geodemographics offers the ability to locate families with academically strong students who could also afford to send their children to Wofford by looking at enrollment patterns, high school students educational backgrounds (public vs. private school educated), and cross-referencing it with geographic data.

This process would allow the college to allocate their resource limited financial aid more effectively to those who truly needed it to attend. Of all families with family incomes above

\$75,000 (the highest level measured by the Census), twelve percent send their students to private high school only, eighty-two percent to public school only and three percent to both (U.S. Department of Education, 2012; Council for American Private Education, 2013). Forty-seven percent of private school students come from families with incomes above \$75,000 (U.S. Census Bureau, 2013). As previously shown, Wofford College has a significantly higher percentage of enrolled students each year than the percentage of private school students represented in the general population. Students from this background appear to value the type of educational experience Wofford provides and based on the data from the U.S. Census Bureau, nearly half of private school students come from the highest income bracket measured by the census.

#### *Identification of Students Who Value a Wofford Experience*

Academic quality, cost, and geography are “fixed characteristics” of any institution of higher education (Chapman, 1981). Wofford College needs to identify students who value the rigorous education and experience Wofford will provide, can afford to enroll (potentially with some tuition discounting) and who are interested in attending college in Spartanburg, South Carolina. The Peacock Nine report indicated that current Wofford students heavily valued four things about Wofford: “student-centric focus”, “small size”, “prestige”, and “liberal arts” while prospective students stated their most important criteria are: “financial aid”, “job preparation”, “value for their money”, “cost” and “location” (Peacock Nine, 2012). The Peacock Nine finding regarding the most important criteria of prospective students illustrates a clear disconnect between the general prospective applicant pool and the ultimate student who enrolls at Wofford. The disconnect may suggest that the pool of prospective students surveyed by Peacock Nine

were likely not students who were interested in the type of education Wofford provides and is a potential limitation for the Peacock Nine study.

The areas identified by Peacock Nine in this study are the popular areas often reported by the press as the purpose of a college education: to get a good job that pays well and that does not cost a lot of money. Essentially, this means a credential for the least upfront cost. That the students Peacock Nine identified did not have the same interests as current Wofford students does not imply that Wofford needs to change to better fit the market demand, but that Wofford needs to better target students who desire the type of education Wofford provides and build a better value proposition for that niche. Students who value critical thinking skills, small class sizes, a liberal arts education, etc. do exist in the prospective student market. A school with the reputation, resources, rigor, and campus beauty that Wofford provides should be able to leverage those strengths to meet their needs. To quote a faculty member, “We have to find what makes us special, develop that identity, and stick with it.... Let’s figure out how to articulate the wonderfulness that is Wofford” (Peacock Nine, 2012).

As previously stated, Geodemographics, the science of marketing to people based on where they live, offers a promising way for Wofford to segment the market and locate students who may be predisposed to the type of education Wofford provides. Specifically, Wofford has strong representation from several pockets around the country. These pockets of enrolled students, outside of the immediate area around Wofford College, are located almost exclusively on direct flight routes. In fact, the only exceptions to this are:

- Los Angeles: 4 students enrolled between 2009 and 2012

- Denver: 4 students enrolled between 2009 and 2012
- Minneapolis: 7 students enrolled between 2009 and 2012
- San Antonio: 4 students enrolled between 2009 and 2012
- Miami: 8 students enrolled between 2009 and 2012
- Other: 14 students enrolled between 2009 and 2012

Put into context, these non-direct flight route students represent 2.3 percent of the total student enrollment between 2009 and 2012. An average of eleven enrolled students per year live outside driving distance or away from a direct flight route to Greenville-Spartanburg International Airport. Essentially, if an admitted student does not live close to an airport with at least twenty direct flights per month, or regionally close to Wofford, it is extremely unlikely that student will enroll at Wofford.

That said, students who live in metropolitan areas with at least twenty direct flight per month have a higher likelihood of enrolling at Wofford. As stated above, these areas include: Chicago, New York/Newark, Baltimore/Washington, Orlando, Dallas, Nashville, Minneapolis, Philadelphia, and Cincinnati. The table below lists the schools on those direct flight paths with the most applicants. Of these schools, Mountain Brook High School is the only public school with 30 applicants to Wofford. These students are more likely to have attended private high schools.

**Table 9: Private High Schools With Wofford Applicants  
That Come From Locations With At Least 20 Direct Flights Per Month.**

School, State	Number of Applicants
Woodberry Forest School, VA	79
The McCallie School, TN	55
Episcopal High School, VA	41
Baylor School, TN	28
Webb School of Knoxville, TN	27

St. Christopher's High School, VA	30
Bolles School, FL	22
Girl's Prep High School, TN	20
Total applicants from these schools	332

This allows us to build a strategic marketing plan to enhance the geographic areas Wofford already recruits from successfully while expanding out from those points of strength. With regard to regions outside of South Carolina, it would appear that special focus on private high schools would be an effective marketing target.

### **Summary of Findings for Study Question 3**

Wofford has provided extensive data on the students who have applied to, been admitted, and ultimately enrolled at Wofford between 2009 and 2012. Combining this data with a geodemographic theory of marketing and mapping indicates that Wofford should focus its recruiting efforts on cities with non-stop flight service to Greenville-Spartanburg International Airport. Within those cities, primary focus should be on private high schools, given the economic needs of the college, the likely financial resources these students have, and the interest students from these schools seem to have for Wofford's personal touch, low faculty to student ratio, and small class sizes. However, Wofford should not simply limit its recruiting efforts to private schools.

The college has long standing relationships with many schools, public and private around the country. Considering the desire to expand their base outside of South Carolina, a focus on new contacts in private schools and inclusion of academically rigorous public high schools in the aforementioned non-stop flight pattern cities would seem prudent. These cities include: Chicago,

New York/Newark, Baltimore/Washington, Orlando, Dallas, Nashville, Minneapolis, Philadelphia, and Cincinnati.

### **Study Limitations**

While several findings emerged from the Capstone team's three study questions, certain study limitations temper the conclusions and implications these findings have for policy and practice

The eight limitations are as follows:

1. The limited time window of the study prevented prolonged observation or interaction with Wofford students, faculty, staff or administrators. A longitudinal study could explore effects and changes over an extended period time that could prove most useful in delineating the effectiveness of Wofford's marketing efforts.

2. There is the threat of selection bias since our sample was one of convenience and may not truly represent the student and faculty population at Wofford College. There is the threat of differential selection in which students and/or faculty/staff and/or administrators could have self-selected to be a part of the sample group, thereby threatening the validity of the data collected in the interviews. The Capstone team requested some diversity in the sample, but was not involved in selection of the interviewees. This issue means that the Capstone team may have interacted with a student and faculty population that are not truly representative of Wofford College.

3. In addition, the twenty students selected do not constitute a large enough sample of students to gather information that can be generalized to Wofford's student population, let alone the national college student population. The sample of students represents just over one percent of Wofford College's enrollment, which is close to sixteen hundred students. The twenty

students selected represented a sample of convenience selected by the Admissions Office and were interviewed on the same day. The limited time frame of that particular interview date, August 8, 2012, could have prevented some students and/or faculty from participating due to conflicts of schedule and the participants selected by the Admissions Office were likely positively inclined towards their Wofford College experience and thus influenced our findings.

4. The Capstone team elected to remove the applicant year 2008 from analysis due to the recession that began in 2008 and its direct impact on family financial reserves with the hopes of attempting to reduce issues of economic instability, which could possibly skew the data between the applicant class of 2008 and those of 2009-2012. Although the team accounted for 2008, there is the possibility that the same or similar economic concerns could have “spilled over” into 2009 or even 2010, which could impact our data and findings.

5. Financial aid data at an individual student level was not available to the Capstone team. While nothing in the applicant data proved to be a significant factor in predicting enrollment, studies on college choice have identified financial aid as being a factor of a student’s college selection. Wofford’s purpose was to identify increased proclivity to enroll from the applicant data, not from the admitted student pool. As such, financial aid data, which is awarded after admission, was not part of the data utilized. Nonetheless, lacking this key factor in student college choice is a significant study limitation in determining increased tendency to enroll.

6. There is the threat of interviewer bias by the members of the Capstone team. The team’s intentional use of the interview protocol was to increase the comparability of responses, ensure the most complete data possible for each of the interviewees, reduce interviewer effects and bias, and permit readers to see and review the instrumentation used in the evaluation.

However, there is the possibility that the habitus and other variables (e.g. age, race, career experience, childhood and youth experiences) of the Capstone team members could skew their individual themes and quotes gathered during the interviewing process. These themes and quotes eventually became the foundation for some of our findings.

7. The Capstone team did not have access to the “raw” quantitative data utilized in the Peacock Nine study and was thus limited to only the selected findings and qualitative data provided by Peacock Nine. The team was limited in their analysis of this data, but had access to the findings and conclusions detailed in that study. Data available from the Peacock Nine study could have been selectively identified for inclusion in that study and by definition creates data integrity concerns for the Capstone team’s use of that data.

8. The Capstone team’s use of logistic regression was limited to variables already utilized by Wofford College. While these variables comprise the college’s “standard protocol” in evaluating applicants and is therefore specifically useful to the institution, the logistic regression did not incorporate variables found in existing literature on college choice and attendance because of a lack of complete data that addresses those variables (e.g., parental education, habitus, socio-economic status, etc.) (Perna, 2006; Hossler, Schmitt and Vesper, 1999). The Capstone team suggests that Wofford College make every effort to acquire complete data sets in future enrollment years in order that these substantiated variables may be included in future study.

Each of these study limitations poses a threat to the marketing plan that follows. The marketing plan, which represents Wofford’s ultimate deliverable item for this project is based upon assumptions gathered from quantitative and qualitative data provided by Wofford. Should



that data be inaccurate, incorrect assumptions could be developed leading to findings and recommendations that are incorrect.

### **Principles for Realizing Wofford College's Ambition for National Stature**

In response to Wofford's desire to expand its regional and national reach and recognition, the College set forth six suggestive principles to aid the Capstone team in realizing their national ambitions. Those suggestive principles, identified earlier in this report, are as follows:

1. Gain a solid understanding of Wofford's culture, assets, and programs
2. Examine the effectiveness of current marketing efforts
3. Identify key geographic areas as target markets
4. Craft a central message and define specific strengths
5. Recommend a strategic marketing plan for implementation
6. Provide evaluation methods for recommended plan

The Capstone team addresses five of these six principles in the following pages. The fourth principle, "Craft a central message and define specific strengths", was partially addressed in this study. Specific strengths of the college are identified; however, the Capstone team felt creation of a central message falls outside of the scope of this project due to its importance in overall branding of the institution.

#### *Principle One; Gain a solid understanding of Wofford's culture, assets, and programs*

To provide an analysis and prediction of this principle, the Capstone team devised study question 1, which sought to uncover traits or qualities in Wofford's current student population (students who were attracted to Wofford and the Wofford experience) might lead to predictors of enrollment. Though the Capstone team failed to uncover any statistically significant predictors

of enrollment in the application data collected by Wofford, interviews with students, faculty, and staff did reveal certain traits and trends that typify Wofford students. Strong academic preparation, being a legacy, and having attended a private school were traits that seemed to indicate a propensity for attendance at Wofford.

These trait discoveries could easily and effectively be utilized by Wofford's admissions staff when attempting to recruit new students. Admissions visits should concentrate on private schools with strong academic reputations, especially those that have former "pipeline" attendees. The concept of legacy can be used in both the admissions process to identify likely prospect, as well as the advancement process, in recruiting alumni to actively "sell" the Wofford experience to friends and family members.

*Principle Two; Examine the effectiveness of current marketing efforts*

Measuring the effectiveness of individual marketing initiatives is one of the most challenging and frustrating issues in marketing (Nichols, 2013). Marketers often measure their initiatives as if they act in isolation. In order to help the College understand their *un*-isolated position within an increasingly competitive higher education marketplace, the Capstone team devised study question 2, which sought to identify Wofford's main competitors in the higher education market.

Both quantitative and qualitative data seemed to support each other in identifying those competitors. The National Student Clearinghouse identified Wofford College's top five competitors as Clemson University, the University of South Carolina (USC), Furman University, the College of Charleston, and Presbyterian College. Wofford should give priority to researching the marketing efforts of these competitors and identify areas in which they can

emulate their peers and areas in which they can distinguish themselves apart from the mainstream. Such an approach would effectively create a niche for the Wofford brand, and allow the college to begin to distinguish itself regionally and nationally.

Wofford College utilizes a wide range of marketing efforts that span direct mail, social media, and internet presence among others. Each of these factors plays a role in enticing potential applicants to consider Wofford as a viable option for a prospective student. The goal of Wofford's marketing is to construct a compelling message about Wofford to the public in a way that is both "authentic" and "real" (Gabbert, 2012).

Without having access to each of the individual marketing initiatives Wofford has implemented over the past few years, the Capstone team evaluated the effectiveness of the current marketing campaign in three ways: through qualitative interview questions (see Appendix A), by reviewing the net effects on Wofford's enrollment changes (the ultimate goal of Wofford's marketing plans), and by evaluating a report by an external consulting firm, Peacock Nine (See Appendix G).

During the interviews with students on August 8, 2012, the Capstone team asked questions about the marketing collateral and communication they received from Wofford prior to enrolling at the College. The only marketing piece consistently mentioned by the subjects was referred to as, "the big fold out poster Wofford sent in the mail" (See Appendix H). Students mentioned it as the single piece of collateral they remembered that set Wofford apart from other colleges. The note referred to is an 8.5 X 11 inch full color mailer that folds out like a map to full poster size. One side of the poster has eight pictures of Wofford and students; the other has a message reminding the students of application deadlines to apply to Wofford. Somewhat ironically, this poster is referred to as the "little note" in the text on the back. It is sent to

applicants in progress to remind them of early decision deadlines and the final deadline to submit their applications. While it is good to know this piece is memorable, that this is the only piece mentioned by the interviewed enrolled students is not a strong argument for the effectiveness of the overall campaign.

In 2005, Wofford set out to increase the enrollment of the college to 1,600 students (Wood, 2012) and since that time, Wofford has experienced an increase in applications each year. The table below, provided by Wofford College, shows the increase in first year student applications and the increase in enrolled students each year as well.

**Table 10: Historical Application And Enrollment Data 2009 to 2012**

	Final	Final	Final	Final
Applications	2009	2010	2011	2012
Initiated	2442	2595	2871	3197
Approved	1415	1607	1861	2005
% of Initiated Apps Approved	58%	62%	65%	63%
<b>Enrollment</b>				
Number of Freshmen	392	431	446	439
% of Approvals Enrolled (yield)	27%	27%	24%	22%

On the surface, from this data it would appear that the marketing campaign has been remarkably effective in driving applications to Wofford; however, there is a major confounding factor to this data and a major area of concern also highlighted in this data. The confounding factor is that in 2004, Wofford began to accept the Common Application. For the class entering in the Fall of 2013, Wofford will only accept the Common Application. The major concern area is the reduction in yield of admitted students. Put another way, more students are applying, but a smaller number of admitted students are selecting Wofford, forcing the college to accept a greater percentage of applicants to meet its enrollment growth goals.

An increase in applications and reduction in yield are both documented effects of the implementation of the Common Application. A few recently documented cases where the Common Application increased applications to a college: The University of North Carolina saw an increase of twenty-three percent in 2012 when they began to accept only the Common Application (Hamrick, 2012). The Ohio State University saw a twenty five percent increase in applications in 2013 after implementing the Common Application (Ramos, 2013). Interestingly for UNC, the increase was mostly for out of state students, an effect that would be a benefit for Wofford College. Wofford's admissions data does reflect a reduction of in-state applications and enrollment between 2009 and 2012 (Table 10). It is unclear if this is a result of an effective marketing campaign, the implementation of the Common Application, or Wofford's tuition simply pricing out South Carolina residents as we have discussed earlier. What is important about the Common Application is that while in many cases it does boost applications and thus potentially boosts selectivity on the college's part (not Wofford's), if not managed correctly, it also reduces yield. Increased application volume and reduced yield, paired with less selectivity, is exactly the issue Wofford is experiencing.

The Common Application's confounding effect on Wofford's applicant pool and the use of net enrollment figures as a method of measurement for Wofford's marketing campaign encouraged the Capstone team to consider the Peacock Nine Report as an additional method of measuring marketing effectiveness.

In short, the Peacock Nine report stated that fewer than twelve percent of prospective students found Wofford's admissions communications efforts to be "engaging". While the subjects found the communication was both "authentic and believable", it was below Peacock

Nine's outcome expectations in response to” To what extent do you feel Wofford's communications do each of the following? (Peacock Nine, LLC, 2012, p. 84)”:

- Establishing the college as unique from others—Scored a 4.5 on a 10 point scale
- Relevant to you (the applicant) personally—Scored a 4 on a 10 point scale
- Motivated you (the applicant) to read them—Scored a 4.25 on a 10 point scale
- Motivate you (the applicant) to become more involved with the college—Scored a 4 on a 10 point scale
- By comparison, the highest scoring section: Seem authentic and believable scored a 5.25 on a 10 point scale

Clearly, these results are troubling and lead to the purpose of both the Capstone project and the engagement of Peacock Nine by Wofford College. Ultimately, these results led the Capstone team to seek to design a strategic marketing plan that leverages the benefits of the Common Application, incorporates the strengths of the college, and focuses the integrated plan in areas that are already successful recruiting grounds for Wofford.

*Principle Three; Identify key geographic areas as target markets*

In order to identify key geographic areas as target markets for Wofford College, the Capstone team devised study question 3, which utilized cutting-edge marketing theory (known as geodemographic modeling) to distinctly identify such target areas. This modeling approach revealed that convenience of access to the college, proximity to Spartanburg, and being private school educated were effective indicators in identifying willingness and propensity of students to enroll. While proximity is unsurprising and does little to serve Wofford in its efforts to augment

its recognition and reach, convenience of access should be thoroughly analyzed. With the expansion of low-cost airlines and new technologies, Wofford should be intentional about identifying geographic pockets that are as of yet unreached. The Capstone team's analysis concluded that these geographic areas could include Chicago, New York/Newark, Baltimore/Washington, Orlando, Dallas, Nashville, Minneapolis, Philadelphia, and Cincinnati. Once pipelines in those areas can be established, the recruitment process will most likely become a self-feeding mechanism.

*Principle Four; Craft a central message and define specific strengths*

As stated above, the Capstone team decided not to attempt the creation of a central message for the college due to such an action's integral place in a branding, rather than a marketing, campaign. It was therefore decided that the creation of a central message duly fell beyond the scope of the current project.

With regard to defining specific strengths, the Capstone team's qualitative interviews of students, faculty, and staff provided concise insight into what those precise strengths are. These strengths are delineated below and include academic rigor and integration (as confirmed in the findings of study question 1) with adequate preparation for graduate studies, a strong sense of community, and a well-respected and knowledgeable faculty.

*Academic Rigor and Integration with Adequate Preparation for Graduate Studies*

"I feel like a 3.5 at Wofford is like a 4.0 anywhere else."

-Lauren, student

"If you want to be a doctor or lawyer and you want to live in South Carolina, then Wofford is your go-to place."

-Mr. Lincoln, staff

"It Is a pipeline to graduate schools"

-Martha, student

*Strong Sense of Community*

"It's probably one of the strongest communities of educational value, there's this sense of Wofford pride."

-Mr. Johnson, staff

"Everyone from admissions, to professors, to the President are just very charismatic, well-rounded people, and that's just always attracted me."

-Rebecca, student

"Wofford make students feel 'at-home'."

-Laura, student

"I would not have survived my time here as a student if there was not that sense of community. My first semester here I almost bombed out and ended up in my advisors office in tears. That atmosphere of support and encouragement, without going overboard, putting the right things in your path, but not handing them to you."

-Ms. Smith, staff and former student

*Well-respected and Knowledgeable Faculty*



"I'm impressed with the quality of the education, the quality of the faculty here."

-Professor North, faculty

"I feel like the faculty care, and they know who you are."

-Rebecca, student

"They're really phenomenal. I'd say that's probably the biggest thing that made me stay."

-Laura, student

"I think students are choosing us primarily for the preparation we can give them academically, the academic experience, and I think the faculty is our greatest asset."

-Dr. Jones, staff

*Principle Five: Recommend a strategic marketing plan for implementation*

At the request of Wofford, and as the key deliverable of this project, the Capstone team has formulated the following strategic marketing plan that offers recommendations for policy and practice and incorporates many of the team's findings in a tangible and realistic approach to augmenting Wofford's reach and recognition on a national level. The marketing plan that follows consists of several parts: a SWOT analysis of Wofford College, a set of recommendations to take advantage of the discovery of the previous research and Wofford's strengths, a set of measures to gauge the effectiveness of the overall plan at set intervals, risks and limitations to this recommendation, and closing thoughts.

### *Purpose of the Marketing Plan*

Wofford College has tasked the Capstone Team with expanding their market reach. Wofford's stated goal is to become more nationally and internationally recognized for the quality education the college provides. Senior leadership has stated that the heavy reliance on students from South Carolina is likely restricting the message of the quality of Wofford's educational experience from reaching a national audience. To be clear, the students that Wofford currently recruits from South Carolina are excellent and Wofford is doing quite well with regard to recognition for quality student outcomes as measured by the Collegiate Learning Assessment (CLA), publications such as Kiplinger's which rank the college highly for value, and the National Survey of Student Engagement (NSSE). Other factors such as a high first year to sophomore retention rate and four-year graduation rate reflect the success that Wofford has with recruiting, educating, and graduating students. Nonetheless, it has been theorized that the over-reliance on students from South Carolina poses several challenges to the long term success of the college.

### *A Geodemographic Model*

The Capstone team has proposed a marketing plan built around a geodemographic model. Currently, fifty-one percent of the students attending Wofford list South Carolina as their state of residence, but that's not the whole picture. Seventy-seven percent of all students currently enrolled at Wofford College live in one of three states: South Carolina, North Carolina, and Georgia. The percent of students enrolled from outside South Carolina has decreased since the class entering in 2009 (61% from South Carolina) to the class entering in the fall of 2012 (48% from South Carolina). In that same period of time, Wofford has expanded the number of states represented in the student body from twenty-four to twenty-seven and increased the size of the

incoming class from 386 in 2009 to 439 in 2012. This has been accomplished without a significant reduction in academic quality as measured by SAT/ACT scores, class ranking, etc. Wofford has done a fantastic job in this first step. Table 1 in this paper shows that applicant information for 2009-2012 supports the strength of the incoming students and the growth of the class each year.

### *Market Segments*

“The premise behind segmentation is that while some prospective students share similar characteristics (such as gender, age, or grade point average), not all students with similar characteristics have the same expectations, goals, and prospects for the future. Students with similar attributes can be grouped, yielding definable segments. This allows HE managers to understand the groups of prospective students better based on their current and evolving needs, backgrounds, and expectations (Rogers, Finley, & Patterson, 2006).”

Just as vocational higher education (accounting, engineering, nursing, etc.) is not for everyone, not everyone will benefit from a 30,000 student, public university experience. A liberal arts education at a small private college encompasses the collision of young minds with great ideas. It includes debates in the classroom and one-on-one guidance led by trained and knowledgeable faculty. It is in this way that those young minds learn to understand and apply those great ideas. “The value of a college education — the thing that leads the earnings of college graduates to remain quite high relative to those lacking a college degree — derives at least as much from the credential conferred upon graduation as it does from what students learn along the way (Linker, 2013).” Those who place the value of a college degree solely on the cost of the credential compared to the immediate salary a recent graduate earns will never embrace the qualities a liberal arts education provides. The ability to identify (segment) prospective

students who are more likely to value liberal arts based education, based on the historical actions of previous students in their area or from the same high school, is a sensible strategy of market segmentation. And since it is also supported by scholarly research, it is both a logical course of action and a conservative use of resources.

### *SWOT Analysis*

To begin a marketing plan, the Capstone team developed a SWOT analysis outlining Wofford's Strengths, Weaknesses, Opportunities, and Threats. A SWOT analysis is the first step in many professional marketing plans. The SWOT below does serve as a quick reference point for much of the following recommendations and demonstrates a solid understanding of Wofford's culture, assets and programs.

## SWOT Analysis

### STRENGTHS

- Ranking/Reputation
- Global Study program
- Foreign language and Sciences programs
- The Novel Experience
- Caring faculty focused on teaching
- Faculty: 94% PhD's
- Great facilities (Senior Village, Mungo Center, and around campus)
- Beautiful campus that is an arboretum.
- Small college with a very successful Division 1 sports program
- Strong CLA and NSSE scores
- Reputation for academic rigor
- Graduate school acceptance—Most students go to first choice school
- Small class sizes (57% below 20 students)
- Faculty to student ratio (1:11)
- Percent of students who live on campus all four years very high
- First year to sophomore retention rate: 89%
- Four year graduation rate: 79%
- 94% of the class of 2011 employed or in graduate school
- Strong Greek culture (Men 42%, Women 53%)
- Career services is a practical component of the Wofford Experience (rare in strong a Liberal Arts program)

### WEAKNESSES

- Heavy representation of SC students on campus
- Heavy representation of GA and NC students as well
- Low representation of international students
- Wofford Bubble
- Lack of student diversity
- Lack of visible faculty diversity (Only 1 of the 35 featured faculty members on the website is visibly a member of an under-represented population)
- Tuition; (2011-2012) -- \$42,565
- Students from within SC are primarily from public schools
- Students from outside SC are primarily from private schools
- Operational expenses heavily tuition dependent (82%)
- Alumni giving rate is low (35% in 2013)
- Endowment
- Strong Greek culture (Men 42%, Women 53%)

**OPPORTUNITIES**

- Global programs could be a foot in the door for international students attending Wofford.
- Bell Ringers program
- Expanded alumni involvement in admissions
- Ripple effect recruiting in identified markets outside of SC
- Small college experience with a Division 1 athletic program
- Small, safe environment-appeal to parents
- In loco parentis
- Campus looks like what an idealized college should look like
- Endowment
- Helicopter parents and the millennial generation
- Research shows that 50% of students are willing to travel 100-1000 miles to attend college. For Wofford, the majority of that range falls in the populous east coast.
  - Wofford already owns its own backyard.

**THREATS**

- The “sea of sameness” in liberal arts education (Wofford not sufficiently differentiated from other strong LA programs)
- SC-Primary market, median family income nearly equals annual tuition price.
- Location-No strong cultural pull for Spartanburg
- ROI-“Value” of college education increasingly being tied to ROI and directly to tuition cost. Wofford’s tuition is high.
  - Political landscape, value is being framed by tuition cost and salary after college.
- The Duke Endowment (funds Davidson, Duke, and Furman)
- Continued instability in the U.S. economy
- Research shows that roughly 50% of applicants attend a college with 100 miles of home; 85% within 500 miles.
  - 40% will travel 100-1000 miles.

## *SWOT Discussion*

### *Strengths*

Currently, Wofford finds itself in the envious position of “owning its own backyard”. That is to say that Wofford is well known and well respected in its region. We refer to this being an envious position in that many schools wish they had the reputation and recognition in their immediate vicinity to build from. Wofford enrolls the majority of its students from a small region surrounding the college and possesses a strong reputation within South Carolina as an academically rigorous education with excellent sciences and foreign languages programs and with personal attention given to its students.

Wofford has a beautiful campus, devoted alumni, engaged faculty, a strong number of legacy students (many with legacy relationships from multiple family members). It has a well-respected and very popular foreign languages program and medical sciences program and the number two student abroad program in the country. The majority of recent graduates heading to graduate school attend their first choice program (Lister, 2013). Interviews with the Capstone team and Peacock Nine each found a strong affinity for the small class sizes (57% of classes have fewer than 20 students), a qualified and caring faculty with a strong focus on teaching undergraduates (1:11 faculty to student ratio), and an interest in academic rigor. These items were considered strengths of the school by students, faculty and alumni (internal stakeholders). There is also a strong Greek Life presence at Wofford with forty-two percent of men and fifty-three percent of women participating potentially encouraging enrollment among prospective students seeking a Greek affiliation in college.

On a functional and measurable level, the school ranks in the top 50 or 75 in many rankings of quality and even higher for value of education. Some example of Wofford's recognition in these areas can be seen in the press releases from Wofford below:

SPARTANBURG, SC -Wofford College ranks 14th among the nation's best colleges and universities for women in the fields of science, technology, engineering and mathematics, according to Forbes.com.

SPARTANBURG, SC -Wofford College's Department of Biology has received national recognition for revisions in its first-year curriculum designed to improve students' knowledge and skills in the discipline.

SPARTANBURG, SC -Wofford ranks 63rd among the 251 national liberal arts colleges and is 27th among 40 national liberal arts colleges on the "best value" list, "Great Schools at Great Prices." The list is determined by a formula that includes the college's academic quality and the net cost of attendance for a student who receives the average level of need-based financial aid.

SPARTANBURG, SC -There are about 200 finalists annually for the Rhodes Scholarship program, and this year two of them make their academic home at Wofford College.

SPARTANBURG, SC- Kiplinger's Personal Finance has included Wofford College on its list of the country's best values in private colleges. The colleges exemplify the attributes parents and students look for in higher education, including small class sizes, a good first-year student retention rate, and a high four-year graduation rate. Wofford has appeared on the list multiple times.

SPARTANBURG, SC - Dr. Charles G. (Charlie) Bass, the Dr. and Mrs. Larry Hearn McCalla Professor of Chemistry at Wofford College, has been named one of the country's best undergraduate teachers by The Princeton Review.



SPARTANBURG, SC- Wofford has been awarded a \$200,000 grant from the Arthur Vining Davis Foundations to collaborate with high school teachers to produce innovative curricular materials for local classrooms.

SPARTANBURG, SC - Wofford is one of the nation's "Best Value" colleges and universities, according to The Princeton Review. Wofford is the only South Carolina institution included on the private colleges list.

Additionally, the Mungo Center for Professional Development is a particular strength and a differentiator in the liberal arts college world. In 2012, the Mungo Center reported that ninety-four percent of all 2011 graduates were either employed or in graduate school, a particular accomplishment given the high level of unemployment/lack of formal direction of college graduates highlighted in the popular press during the past few years of economic uncertainty. In fact the past few years have shown the particular effectiveness of Wofford's education in its measurable student outcomes:

**Table 11: Percent Of Wofford Graduates Employed Or In Graduate School Six Months After Graduation**

Graduation Year	Percent
2009	90%
2010	91%
2011	94%

Wofford's high four year graduation rate and higher freshman to sophomore retention rate reinforce the value of the education to parents and the admission team's ability to select students who are a good fit for Wofford's culture. Most students live on campus all four years, enhancing the culture on campus. The Village, the luxurious senior housing, is a great

culmination to a student's experience at Wofford and a strong selling point for prospective students.

### *Weaknesses*

Wofford has an over dependence on students from South Carolina, North Carolina, and Georgia. The majority of the students from South Carolina graduated from public high schools; those from outside of South Carolina from private schools possibly encouraging a sense of "haves" and "have nots" in the student population that was expressed in the qualitative interviews at the student and staff level. Despite its stated strength in global studies, Wofford currently has a small international student population enrolled. Diversity among students and faculty is low. Only one of thirty-five faculty members profiled on the website is visibly from an under-represented population. The strong Greek Life presence on campus could also be a factor that discourages prospective students from enrolling.

A common refrain among interviewed students is the Wofford Bubble: Wofford students rarely interact with the community outside the campus and that it (the community outside of campus) may be unsafe for students. There seems to be little data to support this theory, but the perception continues.

Finally, Wofford is heavily tuition dependent. Eighty-two percent of the school's operating budget is dependent on tuition. The endowment of \$141 million is larger than the majority of schools which list Wofford as a competitor; however, that endowment is too small to alleviate the school's tuition dependence and the alumni giving rate of thirty-five percent (U.S. News and World Report Best Colleges-2013 Edition, 2012) is lower than desired. The annual tuition at Wofford is almost equal to the median annual family income in South Carolina, the

school's primary recruiting ground. Each of these poses a serious threat to the long term fiscal health of the college.

### *Opportunities*

For a small college, Wofford has a surprisingly robust global studies program. Coupled with the small international student population, there is an opportunity to leverage the international contacts that Wofford has to bring more international students to study at Wofford.

The Peacock Nine Report indicated that internal buyers (students, faculty, and alumni) are huge supporters of Wofford. This is not overly surprising; however, alumni not located in the immediate area offer an interesting opportunity to expand the current recruiting footprint through referrals and direct influence upon high school student connections. By identifying pockets of students already predisposed to the type of education Wofford fosters, marketing communication and efforts can be targeted in a more focused way through alumni connections.

Wofford is one of very few small colleges with a Division 1 sports program and an NFL team that practices on its campus. Student athletes have NFL quality training facilities to utilize while playing for Wofford and attending an academically rigorous college. Wofford has recently had exceptional athletic successes in the SOCON division with championships in several sports and a berth in the NCAA Basketball Tournament in 2012. This offers a fantastic opportunity, even for non-athletes, to leverage these successes into greater brand recognition for the college. Getting into a student's potential college choice set first starts when a student knows of the college. A successful Division One athletic program is an enormous advantage offering the college national visibility that few of Wofford's small liberal arts college competitors can match.

The college looks like the idyllic college campus. Students love it for its beauty, parents love it for its safety and the feeling that their students are well cared for. The generalized

concerns and beliefs about the Millennial Generation and Helicopter offer an opportunity for Wofford to sell the school by getting prospective students and their families to visit the campus. By getting these two stereotypical groups on campus to experience the academically rigorous, safe, nurturing, and caring environment Wofford encourages, the admissions team can push the buttons that matter in a case by case basis.

A campus visit is a significant indicator of student interest in Wofford. The campus sells itself, but this visit should be controlled to maximize the exposure of Wofford's best qualities. Wofford may not offer as many electives as a large state university, but the campus is more aesthetically pleasing, the students are friendlier, the staff is more responsive... Wofford needs to determine ways to take greater advantage of these assets, regardless of whether the prospective student visits before or after admission. After leaving Wofford, visiting prospective students and their families will talk to others about the visit experience. Wofford cannot control that conversation, but can do much to influence how that conversation will go by delivering an excellent visit experience.

Previously identified scholarly research has shown that students place geographic boundaries on their college search process. Additional previously identified research places that limit at about 500 miles from home for the majority of prospective college students. Wofford can focus its efforts and limited resources in that circle and more specifically in the cities with direct flights to Greenville-Spartanburg Airport within that circle. This will allow Wofford to take advantage of this research and to maximize their return on investment of time and money.

### *Threats*

There is a "sea of sameness" in liberal arts education (Qubein, 2012). There are too many to similar colleges around the country serving the same market and without any

differentiating characteristics of significance. Mission Statements, supposed to speak to what the college truly finds important, do not differentiate them. Many of Wofford's primary competitors also have many of the same strengths Wofford possess and even have marginally discernible Mission Statements. The similarity of the Mission Statements below, copied directly from these over simply living up market to differentiate the school over simply living up to or marketing the mission of the college.

#### Wofford College

“Wofford’s mission is to provide superior liberal arts education that prepares its students for extraordinary and positive contributions to society. The focus of Wofford’s mission is upon fostering commitment to excellence in character, performance, leadership, service to others and life-long learning.”

#### Furman University

“Furman University's Mission and Purpose, in summary, is to provide a distinctive undergraduate education encompassing humanities, fine arts, social sciences, mathematics and the natural sciences, and selected professional disciplines. Furman nurtures a commitment to independent thought and lifelong learning. By providing students with a broad exposure to the liberal arts, it seeks to produce graduates grounded in the traditional sources of knowledge yet capable of devising new solutions to problems in their chosen fields.”

#### College of Charleston

“The College actively seeks to admit a diverse group of students who excel academically, individuals who will thrive while engaging in original inquiry and creative expression in an atmosphere of intellectual freedom. This community provides students the opportunity to realize their intellectual and personal potential and to become responsible, productive members of society.”

#### Sewanee: The University of the South

“The College of Arts and Sciences is committed to the development of the whole person through a liberal arts education of the highest quality. Outstanding students work closely with distinguished and diverse faculty in a demanding course of humane and scientific study that prepares them for lives of achievement and service. Providing rich opportunities for leadership and intellectual and spiritual growth, while grounding its community on a pledge of honor, Sewanee enables students to live with grace, integrity, and a reverent concern for the world.”

#### Davidson College

“The primary purpose of Davidson College is to assist students in developing humane instincts and disciplined and creative minds for lives of leadership and service.”

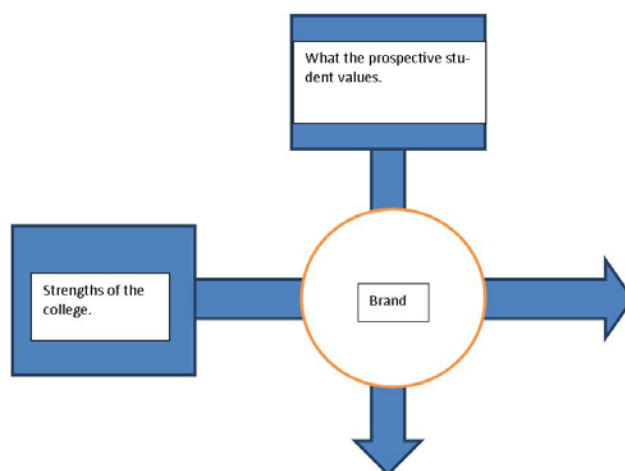
#### Clemson University

“The core of Clemson’s educational experience for undergraduate and graduate students is based on providing every student with a real-world, problem-based engagement experience or leadership opportunity within an environment that supports personal development and responsible citizenship. The University is committed to nurturing critical thinking, communication capabilities, and ethical judgment. The overarching goal is that graduates are creative and entrepreneurial but also are knowledgeable in a discipline and prepared for future opportunities in the global marketplace.”

#### University of South Carolina

“The University of South Carolina provides all students with the highest-quality education, including the knowledge, skills and values necessary for success and responsible citizenship in a complex and changing world through engagement in nationally and internationally ranked research, scholarship, service and artistic creation.”

These schools were selected specifically because they are the previously identified immediate competitors to Wofford College; however, it would not be difficult to review the Mission Statements of many institutions of higher education to see similar references. These mission statements are important, but alone they do not differentiate these colleges and do little to aid a prospective student in determining which college is the best fit for them. Most mention preparing students for leadership, service, or responsible citizenship. (As a side note, while many people equate the value of higher education to a return on investment approach, in none of the mission statements above is there any references to being the least expensive provider of a credential that will assist the graduate with earning a high salary.) What is important to marketing a school is a brand that connects the strengths of a school with the needs of the market. Where the strengths of the school and the desires of the market intersect is the brand of the school as illustrated in Figure 4.



**Figure 4**

Since the strengths of a school are usually closely tied to the mission, keeping true to the mission is frequently heard in academic circles as the purpose of higher education and the ideal direction for marketing. This can be an issue when the strengths of a school are not close to the mission or

if the mission of the school is not valued in the prospective student marketplace. Fortunately for Wofford, its brand is not far from its mission. The key is in the articulation of the mission of the college to prospective students and their family in a way that compels them to view Wofford as the best option for college, not one of a few that offers essentially the same type of education.

Historically, South Carolina is Wofford's primary market. Wofford's tuition is about to eclipse the annual median family income for South Carolina. While there have been many pundits complaining about the high cost of higher education and the high debt load of students graduating from college, the fact that to send one student to Wofford costs nearly as much as an average family makes in a year in South Carolina is a frightening fact, and if made public could seriously undermine Wofford's draw within South Carolina. As Wofford prices itself out of its primary market, new student markets (pipeline development) must be discovered and tapped.

Recent comments by President Obama in the State of the Union and by the Department of Education about creating a College Scorecard highlight the pressure on liberal arts colleges to make a strong argument that their value lies in teaching students how to think and how to adapt, not what to think or to prepare them for today's specific and immediate need jobs. The political focus on return on investment and the way state and federal funds are being spent on higher education, and specifically liberal arts education, is a dire threat to the way liberal arts higher education operates. Wofford is as vulnerable to calls for financial and educational outcome accountability as any other small, private liberal arts college. Paired with the continued instability of the U.S. economy, and as tuition continues to rise faster than inflation, this issue will move even further into the forefront of the higher education discussion.

Specific to Wofford and several of its primary competitors is the Duke Endowment. The Duke Endowment funds scholarships for students who attend Duke University, Furman



University and Davidson College only. This creates a greater price disparity for students considering Wofford and these schools, specifically Davidson College and Furman University who share many of the same applicants. There is an even greater imperative that Wofford show the value of the education the college provides, while similar to both Furman and Davidson, is greater than the difference in cost.

#### *Market Product Focus*

As stated previously, the recommendation is that Wofford focus its out of state recruiting and marketing efforts on their existing areas of strength: the pockets where enrolled students already come from and with students from types of schools where Wofford already sees student recruiting success. Growth from these areas of strength will be a focus of marketing and pipeline development. Over time, the identified regions will produce more students who value the Wofford experience. Wofford can then expand the size of the pocket. Imagine a finger touching a pool of water. Ripples start at the center and expanding covering a greater area. As the ripples expand, the radius of the circle will increase from the original touch point. Wofford will grow its out-of-state student market by selectively “touching” points around the country where they are starting from a position of strength.

To make this work, Wofford will need to segment the market by identifying the metropolitan areas with direct flights which have produced students between 2009 and 2012.

**Table 12: Metro Areas with Wofford Applicants**

Metro Area	Applied	Admitted	% Admitted	Enrolled	Yield
Chicago	42	27	64%	8	30%
New York/Newark, DE	91	59	65%	12	20%
DC Region (VA,DC,MD)	428	301	70%	58	19%
Orlando	338	213	63%	45	21%
Nashville	428	299	70%	64	21%
Dallas	100	65	65%	27	42%
Minneapolis	18	14	78%	12	86%
Cincinnati (OH/KY)	273	200	73%	54	27%
Philadelphia	52	43	83%	13	30%
<b>Targeted Regions</b>	<b>1770</b>	<b>1221</b>	<b>69%</b>	<b>293</b>	<b>24%</b>
General Applicant Pool	10328	6731	65%	1711	25%
SC, NC, GA	7120	4710	66%	1336	28%
<b>Applicant pool, excluding SC, NC, GA</b>	<b>3208</b>	<b>2021</b>	<b>63%</b>	<b>375</b>	<b>19%</b>

The two highlighted areas reflect the targeted regions (direct flight route cities) and the general applicant pool after adjusting for the SC, NC, GA impact on the applicant pool. Without any marketing focus on these areas, the yield rate (the number of students who enroll divided by the number of students who are admitted) is five percent higher than the applicant pool after adjusting for SC, NC and GA's influence (proximity, school reputation, and the Palmetto Scholarship influence for SC residents). That translates into 23 students in a class of 450. It should also be pointed out that the students in these regions are also more likely to be admitted on average (69% vs. 63%). With some targeted marketing in these areas, Wofford should be able to grow the applicant pool and increase the yield rate from this pool.

Specific growth strategy at touch points is to start with the highest yield schools and the schools with the highest number of admitted students each year which are also on the direct flight paths to Wofford. A secondary target will be schools with the most applicants each year also on those flight paths. It should be noted that there will be repetition in these two groups.

The schools with high applicants but low yield rates offer opportunity for growth, but the fact that few students enroll from these schools is an indicator that Wofford is a school of secondary priority (a backup school) for students from this high school. At the same time, Wofford has no opportunity to enroll a student who does not apply, so to ignore the fact that these students are at least applying would be shortsighted. Wofford's admissions office already has all of this information, the primary contacts at each of these schools, and established regional representatives for each high school, so this is simply a focusing of efforts on high schools with the best return on Wofford's investment as first priority. Employers use a similar strategy in college recruiting. They identify the colleges with students who have been most successful with their organization and create a group of "core" colleges to recruit from. There is no reason to think that this same practice would not be effective when applied to "core" high schools for Wofford. Current Wofford students and alumni of these high schools are in an ideal position to reach back to younger students 10<sup>th</sup> grade and up to encourage them to consider Wofford. Measurable goals such as one net new student per high school per year or five net new students per touch point city is an easy way to measure the success of this effort. A net new student is an additional student above what Wofford is already enrolling from that school. Measures of success will be addressed later in this paper.

### *Positioning*

Melamine Foam is an insulation product created by BASF to be an insulator for pipes and ductwork. It is fire retardant and has a long history of use in soundproofing. Melamine Foam was marketed under the name Basotect and was relatively successful as an insulation product; however, it was not the least expensive product and was one of many insulation products that had similar benefits. In the early 2000's Melamine Foam was discovered to be a very effective

abrasive cleaner that did not damage the surface being cleaned. Proctor and Gamble acquired the rights to market Melamine Foam as a household cleaning product and it was re-packaged and marketed as Mr. Clean Magic Eraser. Magic Eraser has proved to be a very successful product for Proctor and Gamble.

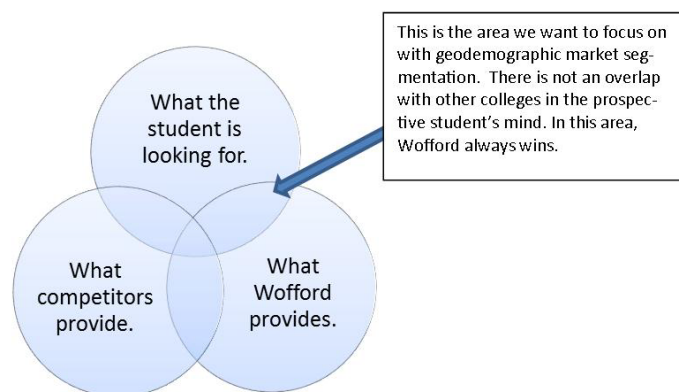
The moral of this story is that a product's purpose, its mission so to speak, is not necessarily what makes a product valuable to the consumer market. In the case of Wofford College, Wofford needs to focus its marketing efforts (position itself) in the areas of particular interest to their buyer: prospective high school students and their families. This is particularly crucial in this time of economic uncertainty and with the current political climate emphasizing the purpose of higher education for professional or vocational use. In Wofford's case, it's about communicating value. It is about marketing what Wofford's buyer (enrolled students) values about Wofford, not what Wofford feels is valuable about its purpose. This does not mean Wofford needs to give up its moral compass, it means that the marketing efforts of the school need to recognize that students select Wofford College for their education for some very specific experiences.

In our interviews with current students and in the Peacock Nine report, several key experiences and resources were identified as key factors in a student's decision to enroll at Wofford: The Mungo Center, Study Abroad, and the Sophomore Experience. In addition, the academic disciplines of foreign languages, the medical sciences, and pre-law program were consistently mentioned. Previous student's success at gaining admission to their first choice graduate school was also a common topic. This contrasted with the Novel Experience, which internal stakeholders on the staff and faculty thought was (and is) a great differentiator, yet appears to hold little significance in students' decision to enroll at the college. This does not

mean that the Novel Experience should be dropped, but it does mean that it's not a primary factor in a student's decision process to select Wofford over a competitor. However, by bundling it into an overarching experience that all Wofford students will undergo, it helps to create differentiating value for the college as a whole.

By branding the strong resources and experiences as "The Wofford Experience," resources and opportunities specific to Wofford College, Wofford claims the high ground when students compare Wofford to other schools such as Furman University. Wofford communicates to parents and prospective students the value of these as a maturing and growth experiences guided by professional, caring and thoughtful faculty who are engaged in the pivotal process of helping students mature into successful young adults. The question those students ask Furman becomes, "Wofford has the Wofford Experience. What do you have?" For parents, this changes the message to value by placing the premium on Wofford's areas of strength: quality education, small class sizes, a safe and caring environment, global study opportunities, high first year to second year student retention, on time graduation, and with desired outcomes of employment or graduate school for the great majority of its graduates in the short term. For prospective students this changes the message to value in resources and benefits of Wofford that they will only be able to get at Wofford. With this strategy in mind, Wofford always wins.

Ultimately, Wofford should compete where the college is strongest. The figure below, adapted from Joe Urbany of the Mendoza School of Business at Notre Dame, illustrates this theory (Urbany, 2011).



**Figure 5**

According to Urbany, there is always an area where what the student desires is not offered in the market, another area where competitors offer what Wofford does not have, and finally an area where competitors offer the same services as Wofford. Where Wofford wins is where the services that only Wofford offers match up to the desires of a certain set of the prospective student market. When this happens, Wofford becomes the only choice for that prospective student. Branding the resources and experiences helps to psychologically set these components of a Wofford education as only available at Wofford in the student's mind. This effect is enhanced by the market segmentation designed to actively seek students already pre-disposed to the experience that Wofford provides.

Finally, with regard to brand quality perception, one must consider college ranking publications. U.S. News and World Report compiles an annual list of the top universities in the United States. In 2013, Wofford College was ranked 63<sup>rd</sup> of the U.S. National Liberal Arts Universities. Machung (1998) found that two-thirds of parents of high performing, college bound students consider the U.S. News ranking to be "very helpful" in evaluating the quality of

the education at a college. With this significant a portion of the potential applicant pool being influenced by this one publication, U.S. News ranking simply cannot be ignored.

In reviewing how U.S. News measures colleges in the National Liberal Arts Ranking, 22.5% of the overall score is determined by undergraduate academic reputation as rated by a peer assessment. The 2013 U.S. News Publication defined this as, "the opinions of those in a position to judge a school's undergraduate academic excellence. The academic peer assessment survey allows top academics-presidents, provosts, and deans of admission- to account for intangibles at peer institutions such as faculty dedication to teaching...we also surveyed 2,213 high school counselors at public high schools." (U.S. News and World Report Best Colleges-2013 Edition, 2012, p. 67). Wofford's Academic Reputation Score in 2013 was 67 out of 100. Table 13 below, drawn from the 2013 U.S. News College Ranking, lists other National Liberal Arts Colleges who are also top competitors to Wofford as shown in the National Student Clearinghouse data. It is clear that the schools with higher Academic Reputation Score for the most part had a correspondingly higher overall ranking.

**Table 13: Academic Reputation Score**

Institution	2013 Academic Reputation Score	2013 School Ranking
Davidson College	83	12
University of the South	75	36
Furman University	71	49
Rhodes College	74	52
Centre College	71	52
Wofford College	67	63
Presbyterian College	60	121

In interviews with Wofford administration, the Capstone team was unable to identify marketing directed at peer institutions leaders (top academics listed above) promoting the excellence of Wofford. By creating a branded experience, and marketing that experience directly to those

influencers U.S. News has identified as being key influencers based specifically on their knowledge of intangibles at peer institutions, Wofford could significantly impact their ranking and perceived academic quality in a publication that is extremely influential to their audience on a national level. This step will assist Wofford's overarching goal of displaying its academic excellence to a greater percentage of the national market and would be significantly more cost effective than a national advertising campaign directed at families of college bound high school students.

### *Integrated Marketing*

The purpose of an integrated marketing plan is to create seamless customer interaction with an organization so that all communication with the organization reinforces the organization's core goals and/or values. Ideally, this is successful when all marketing communication is sharing a unified message, look, and feel. This includes direct marketing, networking, social media, print advertising, etc. Ultimately, this integration of resources and message is more cost effective and carries a greater impact to the customer (Clow & Baack, 2006). In a recent example of this, The Ohio State University announced on February 4, 2013 that they were changing the "O" in the university seal to reflect the more recognizable "O" used by the athletic department (see Appendix C).

Wofford has done a good job of unifying the branding message in print and online with clear instruction on which fonts, logos, colors, and specifically how to reference Wofford or Wofford College in an article (See Appendix D). A formal social media plan, established in 2012, is very specific on which social media outlets to use and not use (See Appendices E and F). The plan even outlines how many social media updates per day per channel need to be completed. Our only comment on the physical branding of the social media channels is that the



itemized three updates per channel per day seems a bit high, particularly for “push” social media such as Twitter, and risks prospective students considering updates from Wofford to be spam and reduce effectiveness.

### *Implementation Plan*

The implementation plan that follows is broken into six categories:

1. Communication/Admissions
2. Website/Social Media
3. Financial Aid
4. Advancement/Alumni Involvement
5. Customer Service
6. Academic Recognition

These actions are designed to support an overarching objective of promoting the value of a Wofford education to students and families most receptive to that message and to move the discussion from the cost of Wofford to the lifelong benefit of a Wofford education.

### *Communications/Admissions*

- Convey a consistent admissions message: “The Wofford Experience”
  - Bundle the reasons current students select Wofford over other programs together in a consistent message of what Wofford offers: Language program, small class sizes, international study, the Mungo Center, the Sophomore Experience, the Novel experience, graduate school admission successes, the four year graduation rate, caring teaching faculty, great dorms, a beautiful campus, and the quality of student life, etc.

- Communication to students: Strengths and benefits of Wofford: languages, sciences, international, graduate school, fun, and personal growth. Work hard, play hard.
- Communication to parents: Value. Freshman to sophomore retention, four year graduation rate, graduate school, small class sizes and one-on-one attention.
  - Find a way to convey safety through stories that show Wofford helping/supporting a young adult grow and find her way.
- Design more marketing collateral/videos that tell a story of how Wofford was crucial in getting alumni where they are today and that illustrate the strengths identified above.
  - Focus on normal alumni that prospective students can relate to, not just the ones in the public eye.
  - Convey how students have leveraged Wofford's many resources to be successful and grow, not just list or mention the resources.
    - Create a trail of bread crumbs with marketing stories.
      - Instead of mentioning a specific resource, tell a story about how a student used that resource and how it positively impacted them.
    - Lead the prospective students down a path to show them why Wofford is the best school option for them.
  - Play on emotion. Identify Wofford alumni who went to Wall Street and those who went overseas with the Peace Corp or founded a non-profit to show that there are multiple outcomes from a Wofford education.

- Need a mix of Wofford alumni. Some very recent in their first job after college and how the Mungo Center was crucial, some alumni five years out, some ten years out.
- Identify how the alumni network helped them to get where they are today.
- Multi-cultural alumni group.
  - Identify and market alongside the other prospective students.
- Humanize the effects and value of the Wofford Experience. Tell stories that have realistic outcomes for a wider range of students.
  - Why/How Wofford was instrumental in their professional life, personal life and a great experience.
- Direct High School Outreach
  - The data Wofford provided shows that Wofford knows exactly which schools are more fertile recruiting grounds.
  - Enhance formal relationships with College Guidance Counselors who are warm to Wofford.
  - Connect current students to younger students (Bell Ringers initiative).
  - ID favorite/influential teachers and reach out to them.
- Recommenders/Student References
  - Wofford should reach out to recommenders with a letter from the President or Dean of Students personally thanking them for their input recommending specific enrolled students over the summer before those students enroll and the next class begins applications.

- Subtly hint about other potential students they may know that may be a good fit for Wofford.
- The majority of high school student recommenders are teachers and guidance counselors who have direct access to Wofford's "buyers" and are in an ideal position to recommend that a student consider Wofford College, particularly if they feel that their efforts are appreciated and influential.
- Create more programs to get rising 11<sup>th</sup> and 12<sup>th</sup> graders on campus for a student experience.
  - The two summer programs in effect now are small scale and specialized.
  - Expansion of programs like these would greatly help prospective students become more familiar with Wofford. They should be designed to focus on Wofford's known areas of strength.
    - Wofford is known for foreign languages.
      - Expand the foreign language immersion program for rising high school juniors and seniors.
    - Wofford is known for pre-med and biological sciences.
      - Design a biological sciences summer program for rising high school juniors and seniors.
    - Consider offering college credit at Wofford for coursework completed by high school students at Wofford's summer seminars as an additional incentive.
    - Done correctly and to scale, these programs can serve as a source of off-cycle revenue for the college and key influencer in a prospective student's enrollment decision.
- Hire a PR firm to seek "advertorial" opportunities for Wofford College.

- Alumni interviews in local papers where the importance of Wofford in their success is mentioned.
- Faculty interviews on research or global study options

### Website/Social Media

- Produce more videos which are also easier for prospective students to find on Wofford's website.
  - The ultimate college buying decision is jointly held between parents and students; marketing needs to speak to both audiences in the format they are most likely to respond too. This means a two pronged approach is needed to market Wofford: videos for prospective students and effective online print information for their parents.
    - Wofford has done an excellent job creating videos for prospective students to watch to get a flavor of the Wofford experience.
      - It can be difficult to locate these videos.
      - They are all on YouTube.com, but with the exception of Vad's Bomb Tour and Study Abroad with Wofford, they appear to not be linked directly from the Wofford website.
    - Design a more prominent link somewhere in the admissions area to make locating these resources easier.
    - Some of the online video content that does a good job creating an emotional connection to Wofford and shows Wofford's culture are:
      - Vad's Bomb Tour (needs an update):  
<https://www.youtube.com/watch?v=Mri1wmy3huI>

- Sweet Home Wofford (2102:)  
<https://www.youtube.com/watch?v=O8xcIgbstIM>
  - Study Abroad with Wofford (2012):  
<https://www.youtube.com/watch?v=rjfYH9ZiLcM>
  - Wofford Terrio (2012):  
<https://www.youtube.com/watch?v=OmnZcCXFRf8>
  - Wofford Village Tour (needs an update):  
<https://www.youtube.com/watch?v=Idb-RGbvBWk>
    - These videos create an emotional connection and show the culture of Wofford (trail of bread crumbs) that is extremely effective in marketing.
- Provide online print that shows the value of the school in a more prominent location for prospective students and their parents to find.
    - The accompanying paper listed articles from Wofford’s news releases. These stories do a good job conveying the value of Wofford; yet, there is no link to these stories which specifically speak to the value of Wofford directly from the admissions page.
      - Create a page for press releases on topics of importance to parents and prospective students which are Wofford value focused. Link it directly from the admissions page for parents and prospective students to find.
- Social Media
    - Wofford needs to consider ways to use social media as a two way communication tool and have updates that are interesting and valuable to prospective students.
      - While social media is an effective way to “push” information to an audience, the audience has to initially opt in to receive that message.

- Wofford already has several Twitter feeds, a Facebook presence, etc. and a very specific set of activities that are approved.
  - Consider removing, “Shining with untarnished honor, y'all”, from the header of the Twitter feed to appeal to a broader national market.
- Currently, social media does not appear to be a two way method of communication.
  - Most of Wofford’s Facebook posts and Tweets are not re-broadcast or re-tweeted and the consistent Facebook picture updates have very few “likes”.
    - Consider activities that will create greater interaction with these medium.
      - A monthly contest for those who comment or re-tweet posts.
      - Pose a question about Wofford with the first correct response getting a prize.
- LinkedIn is not a valuable tool for recruiting high school students; however, it can be utilized to influence parents and education professionals, who can then influence prospective students.
  - Encourage faculty and staff to become active on LinkedIn and other social media sites to be seen as a resource and/or subject matter expert in higher education.

### Financial Aid

- Wofford does not want to compete solely on price; however, to ignore the fact that families consider price, return on investment, and out of pocket costs in their ultimate decision to enroll at Wofford would be naive.

- Research supports that each \$1,000 in financial aid increases a student's likelihood of enrollment and retention by 4.3 percent (St. John, 1990).
- Create a Legacy Scholarship program to further encourage legacy enrollment.
  - Perhaps create a special development campaign for alumni to build this program.
  - Something as small as a \$2,500 Legacy Scholarship that can be "stacked" with other aid may be extremely effective in assisting legacies of the school to continue to attend in high numbers.
- Create Time Zone based scholarships
  - Offer students from the Pacific Time Zone a small stackable scholarship in the range of \$3,000 to offset their travel expenses to college.
  - Offer students in the Mountain Time Zone a small stackable scholarship in the range of \$2,000 to offset their travel expenses to college.
  - Convenience of access to Wofford is a significant factor in enrollment and Wofford needs to encourage students from west of the Mississippi to enroll.
- Match Palmetto style scholarships for out of state students.
  - The Palmetto Scholarship is extremely effective in keeping South Carolina students looking at South Carolina Schools. Our qualitative interviews strongly supported this.
  - Wofford may want to consider a matching program for out of state students.
    - If the state of Texas is offering a student \$5,000 to go to college in Texas, match it so Texas students can choose on Wofford's merits. Level this playing field for out of state students to enroll.
- Bell Ringers



- This is a fantastic leadership recognition program and likely designed to do what the previous scholarship was intended to do with out of state residents.
  - It is not being used solely for out of state residents.
- Continue and expand with expectations of those scholarship holders that they host an event (Wofford pays) over a holiday break for students from their high school.
  - Meet current students from their high school who they likely know.
  - ID favorite/influential teachers and reach out to them.
  - Involve this in the Direct High School Outreach program outlined above.

#### Advancement/Alumni Involvement

- Give Alumni talking points (not mission, but related to this plan) to promote the college.
- Encourage the formation of young alumni clubs in target regions to promote the college professionally and foster social connections.
  - Involve recent alumni in the admissions process.
    - Interviews, recommendations, college fairs, etc.
- Focus on recent alumni for their connections to younger students in their area.
- Focus on more senior alumni for their connections and peers who may have college bound and aged children.
- Incorporate advancement in conjunction with admissions.
  - Encourage giving, even at very low amounts to increase the percentage of alumni giving.
  - U.S. News currently lists Wofford's alumni giving rate at 35 percent.
    - This number constitutes 5 percent on Wofford's annual U.S. News Ranking.

- Set up a giving program for alumni to designate money for student scholarships only (restricted giving for this purpose).
  - These can be legacy scholarships, merit based, academic discipline focused, need based, regional, etc.
  - Once established, these scholarship funds will free other operating money for need-based funding.
- In partnership with these scholarship programs, identify alumni in the regions less represented at Wofford (specifically west of the Mississippi River and north of New York City) and challenge them to create scholarship funds to encourage enrollment of students from their regions.
  - This will benefit the alumni professionally too as their alma mater become better known in the region.
    - Create regional challenges pitting alumni in different time zones to donate to build their regional scholarship program.
  - Each \$250,000 invested at 3 percent will provide \$7,500 per year for these scholarships.
    - An alternative method of resource needed for perpetual scholarship funding is twenty times the desired scholarship (i.e. for a \$10,000 scholarship, the college will need an endowment of \$200,000).

### Customer Service

- Establish a Live Chat feature on the Wofford website. Make it easy to get a quick answer.
  - It is inexpensive, and extremely customer focused and responsive.

- Live Chat also plays to the prospective student's desire for instant access to information with the relative anonymity of the internet.
- It also allows the college to collect the email address of those using the service allowing for targeted follow up.
- Make learning about Wofford College easier.
- Be the most responsive and customer service oriented school that a prospective student will come into contact with
- All communication needs to be seamless, timely, and cheerful.
  - Prompt responses to inquiries from all sources regardless of the source.
- Convenience of access. Make sure that prospective students in target regions know exactly how easy it is to get to Wofford.
  - Post ease of access and transportation to campus options on the website in an easy to find section.
    - Perhaps offer a free shuttle ride for those wearing Wofford gear?
- Hire a professional consulting group to further analyze the high schools of students who enroll and cross reference with financial aid data to build a more complete picture of a Wofford student prospective buyer, family income, etc.
  - Use census data and zip codes to broaden the initial areas where Wofford is strong.
- Hire a PR firm to seek "advertorial" opportunities for Wofford College.
  - Alumni interviews in local papers where the importance of Wofford in their success is mentioned.
  - Faculty interviews on research or global study options
- Campus Visits

- Design additional effective methods to get prospective students and their family on campus.
  - Wofford's beautiful campus sells itself for parents and prospective students.
  - Data from Wofford shows an extremely high number of applicants who visited Wofford ultimately enrolled.

### Academic Recognition

- Create compelling marketing collateral to share with leaders of other higher education institutions and direct competitors touting the strengths of Wofford for the purpose of increased academic peer perception.
  - Target market: Presidents, Provosts, and Deans of Admission who directly influence 22.5 percent of the U.S. News and World Report Annual ranking for National Liberal Arts Colleges.
  - The publication reaches a national audience and increases in ranking here will be more cost effective than a broad national advertising campaign.
  - This is an ideal place to use Wofford's excellent NSSE and CLA data as well as compelling stories about how Wofford's resources and actions benefit students.
    - These recipients understand the importance and value of outcome based measured like NSSE and CLA.

### *Risks and Limitations*

There is significant risk in changing Wofford's marketing plan in this direction. There is a greater risk in taking no action. Some of the key risks are detailed below.

- *Alienation of current South Carolina base*

Wofford has a strong connection to its historical regional base and affiliation. It is a southern and specifically South Carolinian institution. Wofford Admissions official twitter feed is titled, “Shining with untarnished honor, y'all”, clearly promoting Wofford’s southern heritage. Moving away from the institution’s historical base too quickly could alienate the alumni Wofford needs to encourage to promote the college.

- *The geographic target regions identified are limited*

This has the benefit of allowing for resource and message focus, but could also be too limited to have the desired impact of more enrolled students from outside of the region. Wofford may need to hire a consulting firm to analyze the financial data or enrolled student’s families and compare that data to other areas by zip code or other method to identify additional regions with similar prospective student profiles. (The Capstone team did not have access to financial aid data for this project and the proxy data utilized “parent’s education” was inconsistently completed by the applicants to be utilized in this manner.)

- *Scholarship proposal*

Scholarships are resource intensive and may not fit with Wofford’s philosophy in the use of limited resources. A detailed budget analysis would need to be conducted to determine the cost benefit ratio.

- *Faculty Engagement*

Faculty and staff may not see the importance of their involvement with this program. While this seems unlikely based on the limited interaction the Capstone team had with faculty and staff, who seem extremely committed to Wofford, teaching, and the overall student experience, faculty involvement is vital to the effectiveness of this

program. Individual faculty members have the most interaction with students at Wofford and have a positive influence on the student experience, so faculty involvement and support in this plan is vital.

- *Presidential Search*

Wofford College is currently completing a search process for a new President. The new President of Wofford will undoubtedly have strategic goals that may not be in agreement with all or some of this plan. Additionally, the new President may have different resource allocation priorities.

- *Resources*

Building a comprehensive and effective strategic marketing plan will involve significant investment of time and resources. The Capstone team is unclear what level of investment Wofford is able and/or willing to make towards a plan like this while simultaneously conducting a Presidential Search.

*Principle Six: Provide evaluation methods for recommended plan*

“A goal without a plan is just a wish.”—Larry Elder, Author

“A plan without a goal is expensive.”—Susan Collins, Marketer

Marketing must be measured to ensure its effectiveness and to allow for refocused efforts from year to year. However, one of the greatest challenges with marketing is measuring success of individual initiatives. The March 2013 issue of the Harvard Business Review is entirely dedicated to the topic of, “Advertising That Works” and focuses several articles on the difficulty in measuring specific marketing activities. Wes Nichols, in an article in that issue titled “Advertising Analytics 2.0,” discusses a dangerous phenomenon to marketing measurement called “swim lanes”. He argues that, marketers commonly measure the performance of each of

their marketing activities as if they work independently of one another—so called swim-lane measurement.” (p. 63). According to Nichols, organizations should measure marketing against larger organizational goals, not more granularly on things like more web site traffic or clicks on certain pages as a result of a specific advertisement. It is extremely difficult to effectively tie a prospect's first encounter with a product or service. In Wofford's cases, that willingness to reach out to a school may have developed over time, many years of familiarity and interactions with alumni and teachers. To illustrate the challenge, perhaps learning that Wofford College went to the NCAA Men's Basketball Tournament in 2012 for the first time in the school's history will help a current 10<sup>th</sup> grade student to put Wofford into his choice set of schools he is considering. When that student attends a particular college fair, or starts an application, will he have the option to list the 2012 NCAA Tournament as the first time he began to consider Wofford? It is unlikely that will be one of his options, but there is no doubt that having a successful Division One basketball team was important to this student. With this concept in mind, we return to Wofford College's initial goal as paraphrased by Dean Wood, “How can we drive demand?” Increased demand for Wofford in this case is quite simply measured at a macro level. Some prospective measurement tools:

- More applicants overall allowing Wofford to be more selective in admissions decisions and increasing the yield rate of admitted students.
  - Greater selectivity increases the perception of quality at an institution of higher education.
- More applicants from regions outside of South Carolina, North Carolina, and Georgia.

- More specifically, a greater number of applicants and enrolled students from the targeted cities with non-stop flight options to Greenville-Spartanburg International Airport.
- Academic quality, as measured by Wofford's internal key applicant measures are the same or stronger.
- Freshman to sophomore retention rate is the same or higher.
- Four year graduation rate is the same or higher.
- U.S. News Ranking, and more specifically the Peer Assessment Score, is improved causing an increase in the overall ranking of the school and increased national exposure.

### **Conclusions**

Wofford College offers a unique liberal arts experience and is consistently identified as one of the premier private schools in the southeastern United States (Wofford.edu, 2013). However, the college has not consistently been able to attract students outside of its defined regional market and recognizes the need to reform its admissions and recruitment practices to augment its regional and national reach. Through a series of study questions and data analyses the Capstone team identified several indicators and traits of current students that could prove helpful in beginning the process of engaging and recruiting a national student body, as well as suggestions for incorporating those findings into renewed best practices.

Ultimately, the Capstone project proposed by Wofford boils down to one comment from Dr. David Wood; "How can we drive demand?" This statement has a number of marketing nuances. Driving demand to a small, private, liberal arts college in a time of increasing



tuition, stagnant family incomes, increasing debt loads of graduates, and increased scrutiny of the value of the liberal arts (or even college education) are each confounding factors to creating a successful strategic marketing plan to drive demand to Wofford. To drive demand in this kind of market, and to meet the college's stated goal of national prominence, Wofford needs to better define its value to its market. Failure to define that value means that the market will define Wofford. Not every applicant is right for Wofford, but the locations where Wofford has seen success previously, geographically and academically, are ideal spots for Wofford to initiate a segmented, geodemographically driven marketing campaign.

“There is a difference between an education and training.” LZ Granderson

Ultimately, Wofford College needs to compete with all other institutions of higher education: bricks and mortar, online, MOOC's, etc. on value of the full education and experience Wofford provides. An increasing number of students and families are viewing higher education as a commodity. Wofford cannot change this factor. Wofford can only improve its perceived value in the eyes of families and prospective students. Wofford needs to show prospective students the value of a Wofford education with stories of success that highlight what resources Wofford has and what Wofford does that other schools simply do not do. Price is important in higher education and there will always be someone in the market who can be a cheaper provider of a credential; however, competing on price is a losing proposition in the long term for Wofford. There will always be someone in the market who can be a cheaper provider of a credential. Wofford is providing much more than a credential. Wofford needs to win with value.

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# Appendix A



## *Interview Protocol for Wofford College Students, Faculty, Staff, and Alumni*

### *QUESTIONS FOR STUDENTS:*

#### FAMILY BACKGROUND/CHARACTERISTICS

1. What is your family structure (parents, brothers, sisters, etc.)?
2. What kind of work do you and your parents do?
3. Where did you go to high school? Probe for Public/Private? (get name of school if possible)
4. Are other members of your family in college or have others members of your family completed college?
5. How would you describe your family's attitude toward college?
6. Do you have any relatives who went to Wofford College?
7. How do your parents feel about your attending Wofford College?

#### ACADEMIC PREPARATION

1. What kind of skills do you need to do (inside and outside of the classroom) to do well here?
2. Where did you get those skills? Did you get them here?

#### SOCIAL AND ACADEMIC INTEGRATION

1. Do you have access to academic support on campus (tutoring, study groups, etc.)? If yes, do you use these supports?
2. What are the challenges that you have in completing your program of study at Wofford?
3. Have you ever considered transferring to a different institution or dropping out of college? If so, what caused you to stay?
4. Do you have a job? If so, how many hours do you work per week?
5. Are you involved in any clubs or social activities on campus?
6. How would you describe your relationship with faculty on campus? How comfortable do you feel approaching faculty for extra academic help and/or other concerns?
7. Is there a sense of community on this campus?
8. Do you feel that it is important to develop relationships with faculty? How is that accomplished?
9. Thinking about your time in college, has it been what you expected?
10. Most students live on campus all four years. Why do you think that is?
11. Have you considered or have you taken advantage of study abroad while studying here at Wofford?

#### PERCEPTION OF COSTS/BENEFITS/FINANCING

1. Was financial aid a consideration in your enrolling at Wofford?
2. How are you paying for college?
3. Did you fill out the FASFA?
4. Did you apply for any state scholarships? If so, did you receive any? If so, which one(s)?
5. Have you taken out any loans?
6. (If working) did you take a job specifically to pay for college?

7. Why are you trying to complete a college degree?
8. Do you feel like the benefits of a college degree are worth the associated costs?
9. If you met me in an elevator and had 30 seconds to tell me about Wofford, what would you say?
10. What first attracted you to Wofford?
11. How did you first hear about Wofford?
12. What marketing materials or efforts do you remember Wofford using during your college search process?
  - a. Were they effective?
13. How many colleges did you apply to, and what was the determining factor in selecting Wofford College?
14. If able to go back and do it all over again, would you choose Wofford or another college? Why?

#### INSTITUTIONAL CLIMATE

1. Do you feel Wofford is invested in your success? (Give an example).
2. If you have an academic question or concern, whom would you go to?
3. Who would you talk to if you were looking for something fun to do?
4. Does Wofford College have programs to help you transition to college life?
  - a. If yes, did you know about these prior to enrolling?
5. Does Wofford College have programs to help you transition to life after college?
  - a. If yes, did you know about these prior to enrolling?
6. What do you feel are Wofford College's strengths?
7. What do you feel are Wofford's weaknesses?
8. What do you think the mission of Wofford College is? How is it demonstrated? Are there any specific values you feel are well represented here?
9. What was Wofford's reputation prior to your enrollment? Has it changed since you enrolled? How?
10. What is the biggest secret about Wofford (good or bad) that you wish you knew before you decided to attend Wofford?

## *QUESTIONS FOR FACULTY AND STAFF:*

### SOCIAL AND ACADEMIC INTEGRATION

1. Do you feel like your students are prepared for college prior to their arrival?
2. What kind of things do you believe students need to do (inside, outside of the classroom) to do well here?
3. Where do you believe students got those skills? Do you think they get them here? Did High School and/or family prepare them well for these?
4. What challenges do you think your students face in persisting towards a degree?
5. When students leave, what do you think are the reasons for students stopping out and/or dropping out?
6. Is there a sense of community on this campus?
7. What challenges do students have in completing their programs of study?

### INSTITUTIONAL CLIMATE

1. Do you think your institution has the resources to adequately meet the students' needs?
2. Does Wofford College have other programs to help students transition to college life?
3. What do you feel are Wofford College's strengths?
4. What do you feel are Wofford's weaknesses?
5. What do you think the mission of Wofford College is? How is it demonstrated? Are there any specific values you feel are well represented here?
6. What do you believe is Wofford's reputation in the community? With prospective students? With current students and alumni?
7. What is the biggest secret about Wofford (good or bad) that you wish you knew before you decided to attend Wofford?
8. If you met me in an elevator and had 30 seconds to tell me about Wofford, what would you say?
9. Does Wofford College have programs to help students transition to college life?
  - a. If yes, do you think the students knew about these prior to enrolling?

### PERCEPTION OF COSTS/BENEFITS/FINANCING

1. What are some of the financial factors that cause students to leave temporarily or dropout?
2. Do you think students have a basic amount of financial literacy?
3. Do you think your institution has resources (including state support and federal financial aid) to adequately meet the students' needs?
4. Do you think that Wofford's administration has properly allocated its resources to adequately meet the needs of the students?
5. How do you think most students pay for college?
6. Why do you think most students come to college?
7. What first attracted you to Wofford?
8. What do you think attracts students to Wofford?
9. How did you first hear about Wofford?

10. How do you feel most students first hear about Wofford?
11. What colleges and/or universities do think are Wofford's competitors?

## *QUESTIONS FOR ALUMNI:*

### SOCIAL AND ACADEMIC INTEGRATION

1. How many colleges did you apply to, and what was the determining factor in selecting Wofford College?
2. If able to go back and do it all over again, would you choose Wofford or another college? Why?
3. What kind of things do you believe students need to do (inside, outside of the classroom) to do well here?
4. Where do you believe students got those skills? Do you think they get them here? Did High School and/or family prepare them well for these?
5. What challenges do you think your students face in persisting towards a degree?
6. When students leave, what do you think are the reasons for students stopping out and/or dropping out?
7. Is there a sense of community on this campus?

### INSTITUTIONAL CLIMATE

1. What do you feel are Wofford's weaknesses?
2. What do you think the mission of Wofford College is? How is it demonstrated? Are there any specific values you feel are well represented here?
3. What do you believe is Wofford's reputation in the community? With prospective students? With current students and alumni?
4. What is the biggest secret about Wofford (good or bad) that you wish you knew before you decided to attend Wofford?
5. If you met me in an elevator and had 30 seconds to tell me about Wofford, what would you say?
6. Does Wofford College have programs to help students transition to college life?
  - a. If yes, do you think the students knew about these prior to enrolling?

### PERCEPTIONS OF COSTS/BENEFITS/FINANCING

1. Do you think your institution has resources (including state support and federal financial aid) to adequately meet the students' needs?
2. Do you think that Wofford's administration has properly allocated its resources to adequately meet the needs of the students?
3. How do you think most students pay for college?
4. Why do you think most students come to college?
5. What first attracted you to Wofford?
6. What do you think attracts students to Wofford?
7. How did you first hear about Wofford?
8. How do you feel most students first hear about Wofford?
9. What colleges and/or universities do think are Wofford's competitors?

## Appendix B

Conceptual Framework			Evidence		
Students Combined					
Key Constructs	Theme	Key Quotes	Documents	Observations	
<b>Who are Wofford's main competitors?</b>					
P14. If able to go back and do it all over again, would you choose Wofford or another college?					
F8. How many colleges did you apply to, and what was the determining factor in selecting Wofford College?					
F9. Which college would you have enrolled if you had not chosen Wofford? Why?					
<b>What type of student is attracted to Wofford?</b>					
F1. What is your family structure (parents, brothers, sisters, etc.)?					
F2. What kind of work do you and your parents do?					
F3. Where did you go to high school? Probe for Public/Private? (get name of school if possible)					
F4. Are other members of your family in college or have others members of your family completed college?					
F5. How would you describe your family's attitude toward college?					
F6. Do you have any relatives who went to Wofford College?					
F7. How do your parents feel about your attending Wofford College?					
A1. What kind of skills do you need to do (inside and outside of the classroom) to do well here?					
A2. Where did you get those skills? Did you get them here?					
P3. Did you fill out the FASFA?					
I1. Do you feel Wofford is invested in your success? (Give an example).					
I2. If you have an academic question or concern, whom would you go to?					
I3. Who would you talk to if you were looking for something fun to do?					
<b>What are Wofford's comparative advantages/strengths?</b>					
S1. Do you have access to academic support on campus (tutoring, study groups, etc.)? If yes, do you use these supports?					
S2. What are the challenges that you have in completing your program of study at Wofford?					

S3. Have you ever considered transferring to a different institution or dropping out of college? If so, what caused you to stay?					
S4. Do you have a job? If so, how many hours do you work per week?					
S5. Are you involved in any clubs or social activities on campus?					
S6. How would you describe your relationship with faculty on campus? How comfortable do you feel approaching faculty for extra academic help and/or other concerns?					
S7. Is there a sense of community on this campus?					
S8. Do you feel that it is important to develop relationships with faculty? How is that accomplished?					
S10. Most students live on campus all four years. Why do you think that is?					
S11. Have you considered or have you taken advantage of study abroad while studying here at Wofford?					
P1. Was financial aid a consideration in your enrolling at Wofford?					
P2. How are you paying for college?					
P4. Did you apply for any state scholarships? If so, did you receive any? If so, which one(s)?					
P5. Have you taken out any loans?					
P6. (If working) did you take a job specifically to pay for college?					
P7. Why are you trying to complete a college degree?					
P8. Do you feel like the benefits of a college degree are worth the associated costs?					
I6. What do you feel are Wofford College's strengths?					
I7. What do you feel are Wofford's weaknesses?					
S9. If given another chance, would you enroll here again?					
<b>To what extents are Wofford's current marketing efforts effective?</b>					
S9. Thinking about your time in college, has it been what you expected?					
P9. If you met me in an elevator and had 30 seconds to tell me about Wofford, what would you say?					
P10. What first attracted you to Wofford?					
P11. How did you first hear about Wofford?					
P12. What marketing materials or efforts do you remember Wofford using during your college search process? A. Were they effective?					



P13. How many colleges did you apply to, and what was the determining factor in selecting Wofford College?					
I4. Does Wofford College have programs to help you transition to college life?					
a. If yes, did you know about these prior to enrolling?					
I5. Does Wofford College have programs to help you transition to life after college?					
a. If yes, did you know about these prior to enrolling?					
I8. What do you think the mission of Wofford College is? How is it demonstrated? Are there any specific values you feel are well represented here?					
I9. What was Wofford's reputation prior to your enrollment? Has it changed since you enrolled? How?					
I10. What is the biggest secret about Wofford (good or bad) that you wish you knew before you decided to attend Wofford?					
<b>What should Wofford's geographic target be (based on what type of student is attracted to Wofford)?</b>					

F = Family Background/Characteristics  
A = Academic Preparation  
S = Social and Academic Integration  
P = Perception of Costs/Benefits/Financing  
I = Institutional Climate

## Appendix C



Legacy Version



Approved 2013 seal

This is an example of a school changing its logo to implement an integrated marketing plan. Ohio State announced this change on February 4, 2013. According to a university spokesman, the decision was made to make the O in the new seal bear a greater resemblance to the more recognized athletic department O.



## Appendix D

# WOFFORD

Graphics Standards Policies

NOTE: These graphic guidelines can be found on the college's website under Graphics Standards Policies on the Newsroom Web page ([www.wofford.edu/newsroom](http://www.wofford.edu/newsroom)). Please refer to them often to assure compliance. These guidelines govern the use and placement of the Wofford College logo, fonts, color palette, type treatment and formatting templates.

January 2012

# College Mission.

“Wofford’s mission is to provide superior liberal arts education that prepares its students for extraordinary and positive contributions to society. The focus of Wofford’s mission is upon fostering commitment to excellence in character, performance, leadership, service to others and life-long learning.”

*Adopted by the Board of Trustees, May 5, 1998*

## What is a brand?

A brand is any combination of words, colors or symbols that set it apart from anything else.

## Why is a brand important?

A brand is important because it adds focus, meaning and impact to all communications.

Wofford College operates in a competitive environment and must leverage any advantage to tell its story most effectively. A strong brand provides such a lever.

## What is a Brand Voice?

A Brand Voice is all things that communicate the Wofford message. In addition to our website, admissions literature and videos, other mediums such as campus tours, personal interactions with campus guests and even our food service contribute to our Brand Voice.

To support our Brand Voice, all communication (written and verbal) must be consistent.



# Official College Logo.

## Institutional Marks

Note: The preferred logo usage is “Wofford” standing alone as follows:



Note: If you MUST add “College,” do so as follows:



Marks also may be used in black, gold, or white.



## College Seal

*College Seal — to be used on official documents only, i.e., Diplomas, Catalogue, etc.*



## College Colors: Old Gold & Black

Black Pantone® Process Black  
 Metallic Gold Pantone® 873  
 Khaki Pantone® 466\*

C:30% M:30% Y:60% K:10%  
 C:12% M:22% Y:43% K:0%

**\*When matching thread to Khaki, the college requests Madeira 1128 Classic Rayon.**

**NOTE: The marks of Wofford College are controlled under a licensing program administered by the Licensing Resource Group, Inc. Any use of these marks will require written approval from the Licensing Resource Group, Inc. ([www.lrgusa.com](http://www.lrgusa.com) — 616.395.0676).**

Authorized Wording	General Information
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Wofford™  
Wofford College™  
Wofford Terrier Club™  
Wofford College Terriers™  
Wofford Terriers™

Location: Spartanburg, S.C.  
Mascot: Terriers  
Established: 1854  
Athletics Conference: Southern Conference  
NCAA, Division I

**Athletics Primary Mark**



**Athletics Secondary Marks**



**Additional Pertinent Information**

Alterations to seal /marks permitted:	Yes	No
Overlying / intersecting graphics permitted with seal:	—	<u>X</u>
College licenses consumables:	<u>X</u>	—
College permits numbers on products for resale:	<u>X</u>	—
Mascot caricatures permitted:	—	<u>X</u>
Cross licensing with other marks permitted:	<u>X</u>	—

***NO USE of current player's name, image, or likeness is permitted on commercial products in violation of NCAA rules and regulations.***

***NO REFERENCES to alcohol, drugs, or tobacco-related products may be used in conjunction with College marks.***

Always leave some “white space” around the logo to assure nothing touches it.

**Increasing or decreasing the size of one word also must be done equally to the other. The colors described should be strictly followed. Logotype colors should never be altered or have color designs borrowed from other color sets.**

Black is the preferred color. Approved gold also can be used if it is clearly legible. Gold alone can be difficult to use so extreme care must be taken when doing so.

# Sub Brands.

All organizations and departments can benefit from the official logo by adding their sub brand. Some examples are:

WOFFORD

Department of Accounting, Business and Finance

WOFFORD

Department of History

WOFFORD

Department of Art and Art History

WOFFORD

Humanities Program

WOFFORD

Department of Biology

WOFFORD

Department of Mathematics

WOFFORD

Department of Chemistry

WOFFORD

Department of Military Science

WOFFORD

Department of Computer Science

WOFFORD

Department of Music

WOFFORD

Department of Economics

WOFFORD

Department of Physical Education

WOFFORD

Department of Education

WOFFORD

Department of Physics

WOFFORD

Department of English

WOFFORD

Department of Psychology

WOFFORD

Department of Environmental Studies

WOFFORD

Department of Religion

WOFFORD

Department of Foreign Languages

WOFFORD

Department of Sociology

WOFFORD

Department of Government

WOFFORD

Department of Theatre

WOFFORD  
Office of Admission

WOFFORD  
Office of Health Services

WOFFORD  
Office of the Registrar

WOFFORD  
Office of Academic Affairs

WOFFORD  
Sandor Teszler Library

WOFFORD  
Office of Financial Aid

WOFFORD  
The Center for Global &  
Community Engagement

WOFFORD  
The Center for  
Professional Excellence

## Taglines.

The college does not use a tagline. The old tagline “Quintessential...A Wofford Education” is no longer to be used.

## Improper usage examples.

WoCo

Logos in any color other than black, gold, or white

Tdogs

## Office of Communications & Marketing Services.

Digital art is available from the department and is also on the Wofford website under the Newsroom Web page.

## Mandatory Equal Opportunity Statement.

Based on a 2011 advisory from the college attorney, federal law requires any publications used to advertise revenue-generating services to prospective students or the general public MUST include the following statement:

“It is the policy of Wofford College to provide equal opportunities and reasonable accommodation to all persons regardless of race, color, creed, religion, sex, age, national origin, disability, veteran status or other legally protected status in accordance with federal and state laws.”

This policy specifically includes any college-sponsored event where an admission fee is charged, including cultural events, athletics contests and summer camps.

## Date of Publication.

All Wofford publications should include a month and year on the title page or back cover. For example: January 2012



# Appendix E

**Wofford College Social Media Marketing Strategy**  
**Adopted June 2012**

Wofford College integrates a variety of social media applications into its overall marketing strategy in support of the college's mission: To provide a superior liberal arts education that prepares students for extraordinary and positive contributions to society. The focus of Wofford's mission is upon fostering commitment to excellence in character, performance, leadership, service to others and life-long learning.

Social media venues being used by the college including, but may not be limited to, Facebook, Twitter, YouTube and LinkedIn. (Currently, the college has elected not to participate Pinterest.)

The use of social media applications for official Wofford College purposes is governed by a separate Wofford College Social Media Policy.

**Social media marketing strategy**

- 1) Social media will be used to enhance and complement other Wofford marketing, communications and branding programs, incorporating and leveraging appropriate messages to appropriate audiences.
- 2) Wofford's social media purpose includes:
  - a. Establishing and enhancing the college's profile as a top national liberal arts college that provides a superior liberal arts education and prepares students for extraordinary and positive contributions to society
  - b. Increasing the pool of prospective students
  - c. Increasing the incidence of commitment by prospective students
  - d. Increasing loyalty among alumni and supporters
  - e. Increasing loyalty and giving among current donors and expanding the donor base
  - f. Engaging each of these (and other) audiences and constituencies appropriately through social media outlets
- 3) Generate relevant online content
  - a. Showcase current students who exemplify the mission
  - b. Showcase faculty who exemplify the mission
  - c. Showcase alumni who exemplify the mission
  - d. Provide relevant information about Wofford, especially as it relates to the mission statement
  - e. Provide relevant information about a liberal arts education, especially as it relates to Wofford College
- 4) Social media will rely primarily on engaging the audience rather than pushing routine news and announcements to the audience. This means accompanying

information with opportunities for engagement, such as asking questions, seeking comments, conducting polls, etc.

- 5) Report “micronews,” such as “breaking” exciting and positive news about a student, faculty or staff member, or alumnus. This can be accomplished through linking from other content or sharing from other pages or timelines. This is “quick” news that has no need for a full news release, at least in the social media venue.
- 6) Brief, but strong, content can be key to retaining an audience.
- 7) The use of engaging photographs and video, especially those that illustrate examples that support the college’s mission, is an effective way to engage the social media audience. Use these as another opportunity to engage the audience – ask users to tag themselves and their friends, and to share the photos/video on their own pages and timelines; ask users what they liked most about the event being illustrated, either as a current student or as an alumnus reminiscing about their time at Wofford; etc.
- 8) Post at least three times a day, but be sure your posts are relevant and strong, and engaging.
- 9) Invite students, alumni and other audience members to their specific networks.
- 10) Support your use of social media through other means – include your Facebook or Twitter accounts on invitations and other printed materials, such as posters and fliers; include in signage at campus events; etc.
- 11) Integrate social media in your overarching campaigns, such as development, alumni events, athletics, etc.



## Appendix F

**Wofford College Social Media Guidelines**  
**Adopted June 2012**

**Policy**

The purpose of these guidelines is to help Wofford communicators understand how Wofford policies apply to communications technologies such as blogs and social networking sites, and to guide them in using these platforms. The guidelines apply to material that various Wofford offices publish on Wofford-hosted websites and related Wofford sites, such as those on Facebook, Twitter and YouTube. (Note that, for now, Wofford has determined that no official college use of Pinterest is authorized.)

Any questions about these guidelines should be directed to the Vice President of Communications and Marketing, Doug Gabbert, at [gabbertdc@wofford.edu](mailto:gabbertdc@wofford.edu).

**Rationale**

Blogs, social networks and websites such as Wikipedia, Facebook, Twitter, Flickr and YouTube are exciting channels for Wofford communicators to share knowledge and connect with key audiences, including students, prospective students, alumni, donors and others who may not consume “traditional” media as frequently as others. Wofford supports this kind of participation in online communities and maintains a strong commitment to academic freedom in these channels. Because social media channels are evolving every day, these guidelines were adapted from respected online and industry sources to provide guidance in using these forums effectively, protecting personal and professional reputation and following college policies. They also may be adapted as new social media networks become available.

**Procedures**

There are four types of college-related social media accounts:

- 1) Institutional accounts – these represent the official college social media communication venues. These sites are created and managed by the Office of Information Management and the Office of Communications and Marketing, collaboratively. No additional administrators outside of these two offices – IM and OCM – can be added without the permission of the vice presidents of these two divisions.
  - a. Facebook
  - b. Twitter
  - c. YouTube
- 2) College-recognized departmental/unit accounts – these represent official college units and have full-time college employee assigned to administer the accounts. College units associated with a recognized account are responsible for the content. It is the responsibility of the account administrator to oversee the content and dialogue. These also may be monitored by administrators in IM and OCM.

- 3) Student organization accounts – these represent recognized student organizations that are affiliated with the college. When using the college’s visual identity (name and/or logo(s)), the usage must meet the Graphics Standards Policies ([http://www.wofford.edu/uploadedFiles/newsroom/newsImagesPhotos/New\\_Logos\\_2012/Graphics%20Standards%20Policies\\_final4.pdf](http://www.wofford.edu/uploadedFiles/newsroom/newsImagesPhotos/New_Logos_2012/Graphics%20Standards%20Policies_final4.pdf)). These accounts also are required to fully comply with the college’s social media guidelines. These also may be monitored by administrators in IM and OCM.
- 4) Unaffiliated accounts – these represent groups of users with a common interest and identification with the college, such as incoming first-year students who may create a Facebook group to establish connections prior to attending Wofford. If these accounts choose to use the college’s visual identity (name and/or logo(s)), the usage must meet the Graphics Standards Policies and may be monitored by administrators in IM and OCM.

Registering your Wofford-related account:

Benefits to having a Wofford-registered social media site include:

- 1) The site will be listed on the Wofford Social Media Director online, aimed at driving users to the accounts.
- 2) It will receive a legal disclaimer stating that it is a Wofford-recognized account.
- 3) It will be connected to Wofford’s institutional (main) profiles on Facebook, Twitter and YouTube.
- 4) Administrators will have access to college created and approved icons and social media designs that can be used and adapted for individual departments or units.

Guidelines on registering your site:

- 1) Registration may be applied for by any college department or unit wanting to maintain a social media presence within a college affiliation.
- 2) At least one Wofford employee must be registered as the account administrator for the purpose of identifying the accounts’ contact person and to provide continuity. As a best-practice suggestion, OCM recommends two staff members have access to the social media account(s).
- 3) To apply for registration, provide the OCM ([woffordnews@wofford.edu](mailto:woffordnews@wofford.edu)) with the following information:
  - a. Department/unit name
  - b. Desired social media identification (such as facebook.com/woffordWellnessCenter)
  - c. Names and Wofford email addresses of two staff administrators
  - d. List what social media venue(s) you wish to register (Facebook, Twitter, YouTube)
- 4) ALL current social media accounts must be registered with IM and OCM.

## **Other considerations**

**Understand your department/unit/organization's strategy** – Social media efforts should be part of a larger communications strategy. Understand your goals and objectives within the mission of the college as well as your unit. What are you trying to accomplish and why? Who is your audience? What do you want them to do (apply, donate, attend events, etc.)? Is social media the best way to do this?

**Follow all applicable Wofford policies** – You must not share confidential or proprietary information about Wofford College, its personnel or its students, for example.

**Remember that everything is public** – There is no such thing as a “private” social media site. Don't post anything that may haunt you later.

**Be respectful** – Even if you provide a disclaimer that your views are your own, readers seeing your Wofford affiliation may read your words as representing the college.

**Be transparent about your role at Wofford** – If you participate in or maintain a social media site on behalf of Wofford, clearly state your role and goals. Strive for accuracy, correcting errors quickly and visibly. If you have questions about whether it is appropriate to write about certain material, as your supervisor first.

**Moderate comments and discussions** – Social networking sites are participatory and involve sharing among multiple users. It is important to monitor live discussions for off-topic or abusive comments. Whenever possible, moderate comments and be transparent in doing so.

# Appendix G

PEACOCK NINE  
CHICAGO • SHANGHAI



# Wofford College Marketing and Positioning Discovery

Final Report  
June 2012

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# 9 Key Findings

## 1. Wofford is loved—by those who know it best

*Wofford's "internal" stakeholders clearly love the college. In fact, Wofford's Net Promoter Score (64%) rivals Apple and Google.*

## 2. There are opportunities for improvement...or at least a strategic point of view

*Respondents did voice discontent about topics such as the roles of Greek life, athletics, diversity, and the arts.*

## 3. A strategic plan and unifying vision are key

*Findings suggest that a unifying "plan" might provide clarity, focus and ultimately accelerate Wofford's successful evolution.*

## 4. Greater transparency and collaboration will help get the organization "on board"

*More efforts to inform/involve alumni and faculty/staff will likely increase morale and trust—the bedrock of organizational change.*

## 5. Wofford is a "secret garden"

*The "magic" of the Wofford experience is largely unknown to those beyond our walls—we must let the outside world, in.*

## 6. Our reach is limited

*We must craft a unique "story" for Wofford that can be shared far, wide and well beyond the borders of South Carolina.*

## 7. Strategic marketing must become a central function and core competency of the college

*Our marketing efforts must be aggressive, authentic, disciplined, strategic and centralized—an empowered hub rather than a spoke.*

## 8. Our alumni are an underleveraged resource

*We must proactively involve our alumni as storytellers, evangelists and advisors for the college. We must help them share the "Wofford experience" on our behalf.*

## 9. The time to start, is now

*The higher-educational landscape is changing. Economic and competitive pressures are high. Our internal stakeholders believe in Wofford. They yearn for direction. They want to be more involved. A presidential search is commencing.*

# Research Overview

In March 2012, Wofford College commissioned Peacock Nine, LLC to provide President Dunlap and his leadership team with unique insight into Wofford College's key stakeholders that could help inform future marketing and positioning efforts— which are essential “fuel” for Wofford's continued, positive transformation.

To assist with this, Peacock Nine delved into a deeper more unique understanding of Wofford's key stakeholder groups and their perceptions of Wofford College, in its competitive context.

## Wofford's Key Stakeholder Groups

- ✓ Faculty/Staff
- ✓ Current Students
- ✓ Alumni
- ✓ Parents
- ✓ Trustees
- ✓ Prospective Students (high school sophomores and juniors – with desired characteristics – selected by admissions)

## Question Areas:

- ✓ Attitudes about Wofford College
- ✓ Triggers of and barriers to greater involvement
- ✓ Perceptions of Wofford College within its competitive set
  - ✓ Brand position
  - ✓ Relevance
  - ✓ Identification
- ✓ Marketing and Communications
  - ✓ Current effectiveness
  - ✓ Future opportunities

# Research Overview

Peacock Nine designed, fielded and analyzed both an extensive, twenty-five minute quantitative survey and four online discussion forums in support of this initiative.

## Quantitative Survey + BACON™ Neural Network

This quantitative engagement was fielded between April 23<sup>rd</sup> and April 30<sup>th</sup>, 2012. Completed surveys were collected from 1447 of Wofford's stakeholders over this time period.

- ✓ 154 Faculty/Staff
  - ✓ 328 Current Students
  - ✓ 612 Alumni
  - ✓ 255 Parents
  - ✓ 11 Trustees
  - ✓ 200 Prospective Students (sophomores and juniors)
- 1550 points of view (n=1447)\*

## Qualitative Discussion Sessions

Peacock Nine then conducted four, professionally moderated, online discussion sessions with members of each stakeholder group. Each session was two days in duration.

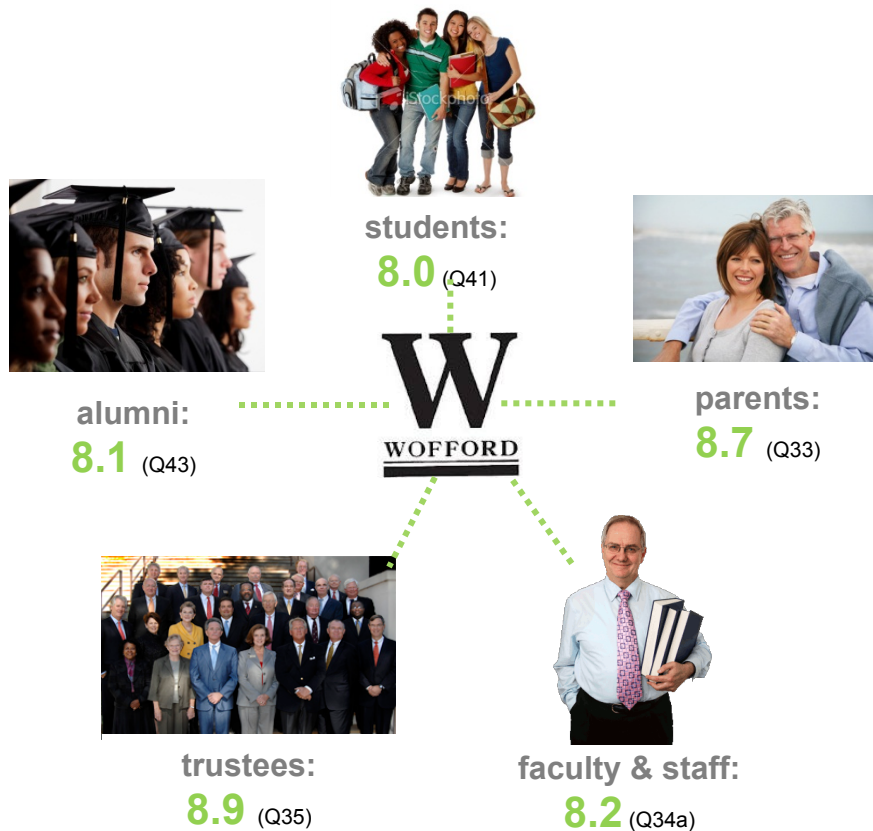
- ✓ 10 Faculty/Staff
- ✓ 10 Students
- ✓ 8 Alumni & Trustees
- ✓ 11 Prospective Students (sophomores and juniors)

# Delighted Masses

## *“Internal” Stakeholders’ View Of Wofford*

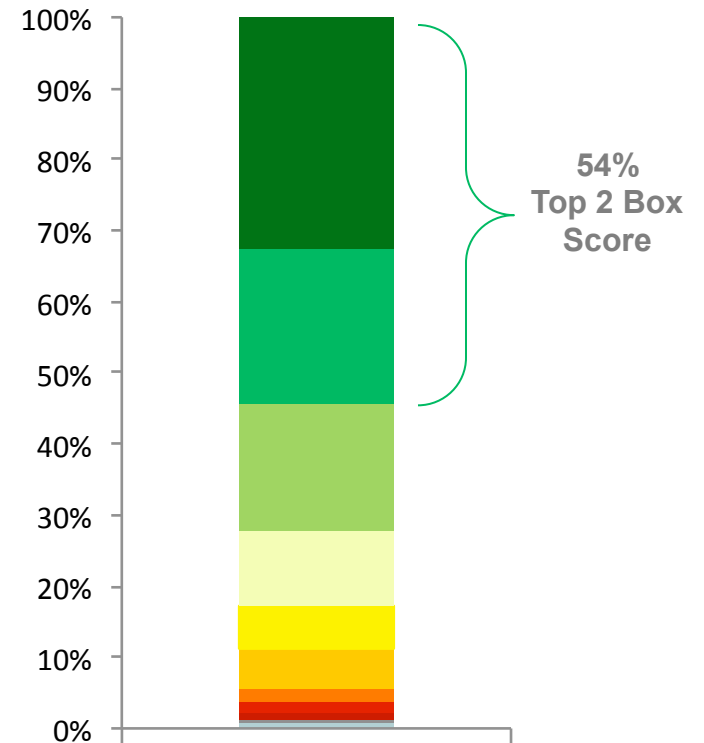
# At a macro level, the Wofford community is satisfied with their experience.

## Average satisfaction scores by "internal" segment



## Composite satisfaction ratings\*

\* Composite of Q41, Q33, Q34a, Q35, Q42, Q43, Q44.



NOTE: Some respondents are included in more than one segment.



In fact...

75%

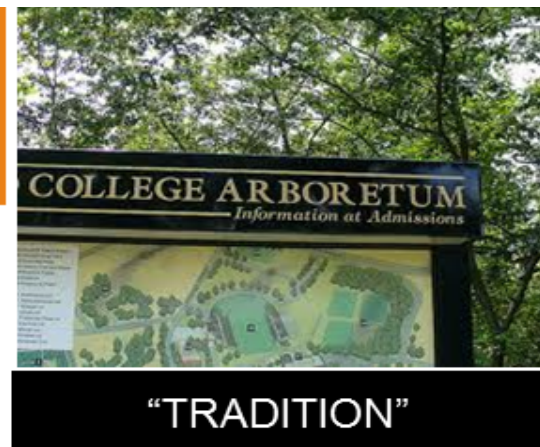
of internal constituents would  
“highly recommend” Wofford to  
someone applying to college

Q45. How likely would you be to recommend Wofford to a friend or family member who was looking to apply to college? (Top 2 Box Score) (n=951)



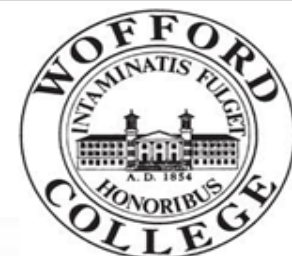
# ...and a healthy dose of sentimentalism.

Q44a. What are three symbols or icons that you feel best represent “Wofford College”? What are the feelings that each of them holds for you?



“HISTORY”

“ENERGETIC & FEISTY”



“BELOVED”



“INTERESTING”



“INTELLIGENT”



## In their words...

“I would describe Wofford as a **small college** in the upstate of **South Carolina**. It is **ranked number one** in the state for its academics. It was also ranked in the Forbes list of **top schools** in the nation. The college has a **great student atmosphere** and the grounds are **beautiful**. There are many opportunities that are provided that are hard to come by in a public school like **studying abroad**.” *(Current Student)*

“**Small co-ed liberal arts** college in a gracious community. Excellent **student/faculty ratio**. **Committed faculty** involvement with students. **Excellent communication** from admission and financial aid staff. **Beautiful** campus, good facilities. **Supportive** community, **welcoming** atmosphere. Well spoken students. Exciting **study abroad** options.” *(Parent)*

“I would tell them that Wofford is a **small liberal arts school** located in Spartanburg, SC. The **students and faculty have close relationships** that provide for a unique learning atmosphere. Outside of the classroom, the small student body and large percentage of students living on campus provides a **great college feel**. The school is located on a **beautiful campus** with first rate class rooms, dorms, and athletic facilities. I want to tell them that you don't just go to Wofford, you **become a part of the school**. It's something that stays with you the rest of your life.” *(Alumni)*

“Excellent **small liberal arts school**, strong sense of **community** and shared **purpose**, **beautiful** campus, **interdisciplinary** studies, ample opportunity to **study abroad**.” *(Faculty/Staff)*

“**Small, liberal arts**, United **Methodist** related, **coed** school with an **amazing faculty** dedicated to the student body. A campus that lends itself to a "**family feeling**" atmosphere where all are made to feel a part of the 'Wofford Experience'. Wofford College offers an educational vision that far exceeds the boundaries of her **beautiful campus** while at the same time reinforcing the meaning **/feeling of community**.” *(Trustee)*



What are the  
sources of this  
satisfaction?

# When our students and alumni were first applying to college, there were clearly common factors guiding their decision.

When asked what was most important to them when applying to college, Wofford students (past and present) provided this Top 10 List:

*% of students and alumni who rated attribute as "Very Important" (score of 9 or 10)*

---

## TOP 10 LIST

- |     |   |     |
|-----|---|-----|
| 1.  | Academic excellence                           | 78% |
| 2.  | Student centric focus                         | 71% |
| 3.  | Financial aid                                 | 58% |
| 4.  | Small size                                    | 54% |
| 5.  | Prestige                                      | 50% |
| 6.  | Attractive campus / atmosphere                | 49% |
| 7.  | Preparing students to find jobs / internships | 48% |
| 8.  | Value for the money                           | 48% |
| 9.  | Liberal Arts Education                        | 46% |
| 10. | Cost  | 46% |

# Wofford has met or exceeded their great expectations—bar two.

When the internal constituent groups were asked to assess Wofford on each of these metrics, the ratings were impressive. In fact, with the exception of “financial aid” and “cost”, all scores were above a 7.0 (out of 10)

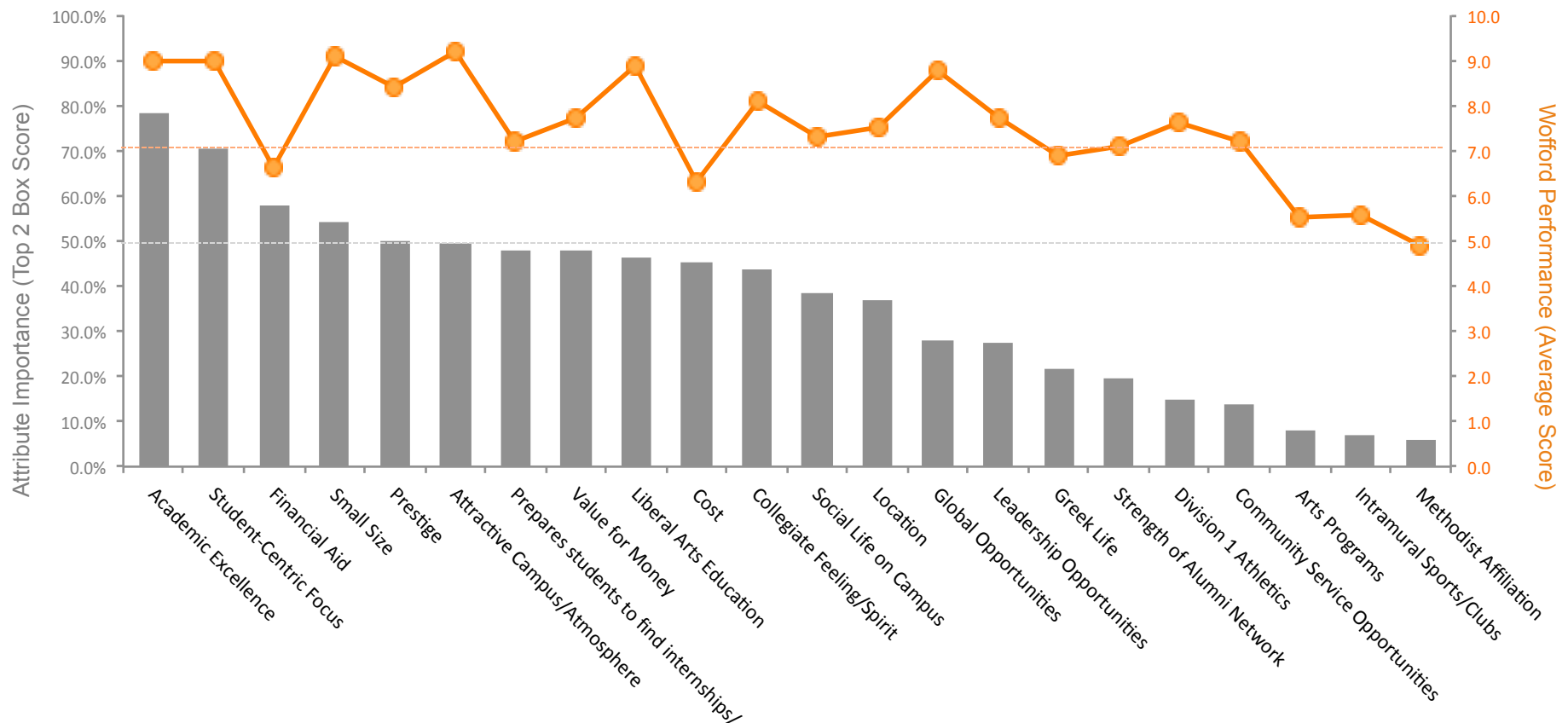
	% of students and alumni who rated attribute as “Very Important” <i>(score of 9 or 10)</i>	average satisfaction score from students, alumni, parents, faculty/staff and trustees <i>(out of 10)</i>
1. Academic excellence	78%	9.0
2. Student centric focus	71%	9.0
3. Financial aid	58%	6.6
4. Small size	54%	9.1
5. Prestige	50%	8.4
6. Attractive campus / atmosphere	49%	9.2
7. Preparing students to find jobs / internships	48%	7.2
8. Value for the money	48%	7.7
9. Liberal Arts Education	46%	8.9
10. Cost	46%	6.3

Q48. Thinking back to when you were deciding which undergraduate college/university to attend, how important were the following attributes to you? (BASE: Current Students & Alumni; n=939)

Q51. How well do you feel Wofford College currently delivers across each of the following attributes? (BASE: All Internal Segments, n=1277)

# In fact, our “internal” stakeholders believe Wofford performs well on nearly every attribute measured.

- 21 of the 22 attributes were rated above average (5.0) ... and **15 were rated over 7.0**
- “Financial Aid” and “Cost” are notable exceptions. They were rated significantly lower than the other attributes that students and alumni rated as “very important” to them



## In their own words.

Q46b. What parts of your “Wofford Experience” were or have been the most meaningful to you?  
What makes you feel this way?

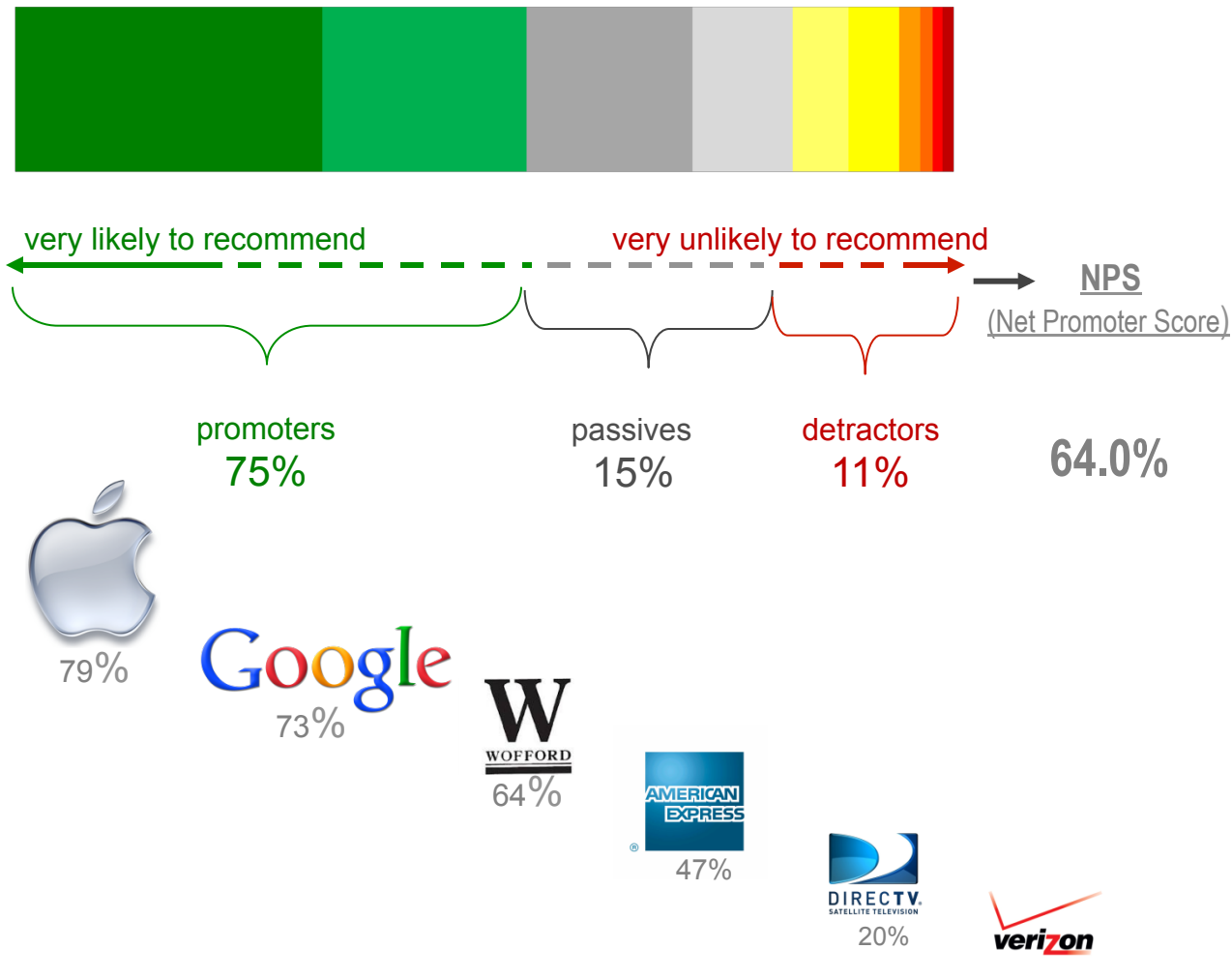
“I feel that my **relationship with my professors** have been the most meaningful. They have really done their best to help me be successful, knowledgeable, and ensure that Wofford will be one of the greatest memories of my life that I will always look back on.” *(Current Student)*

“My **study abroad experience**- it really opened my eyes to the outside world and gave me a new perspective. I think being able to take a look from outside the box is very important. This correlates to the liberal arts education at Wofford in general. That type of education I feel just makes people well rounded and knowledgeable in many areas of academia.” *(Current Student)*

“The **social scene** at Wofford was very meaningful for me. I believe that its **small size** and **on-campus living** allowed me to make many friends and enjoy the company of a highly intelligent, socially adept group of people. Each aspect of the college fostered this **camaraderie**: from the residence halls to the classroom to the fraternity row.” *(Alumni)*

“**Football team.** It allowed a guy like me to come in on an athletic scholarship and earn an education that has taken me where I never thought I would be.” *(Alumni)*

Importantly, this high satisfaction among Wofford's "internal" stakeholders translates into a remarkable "Net Promoter" score.

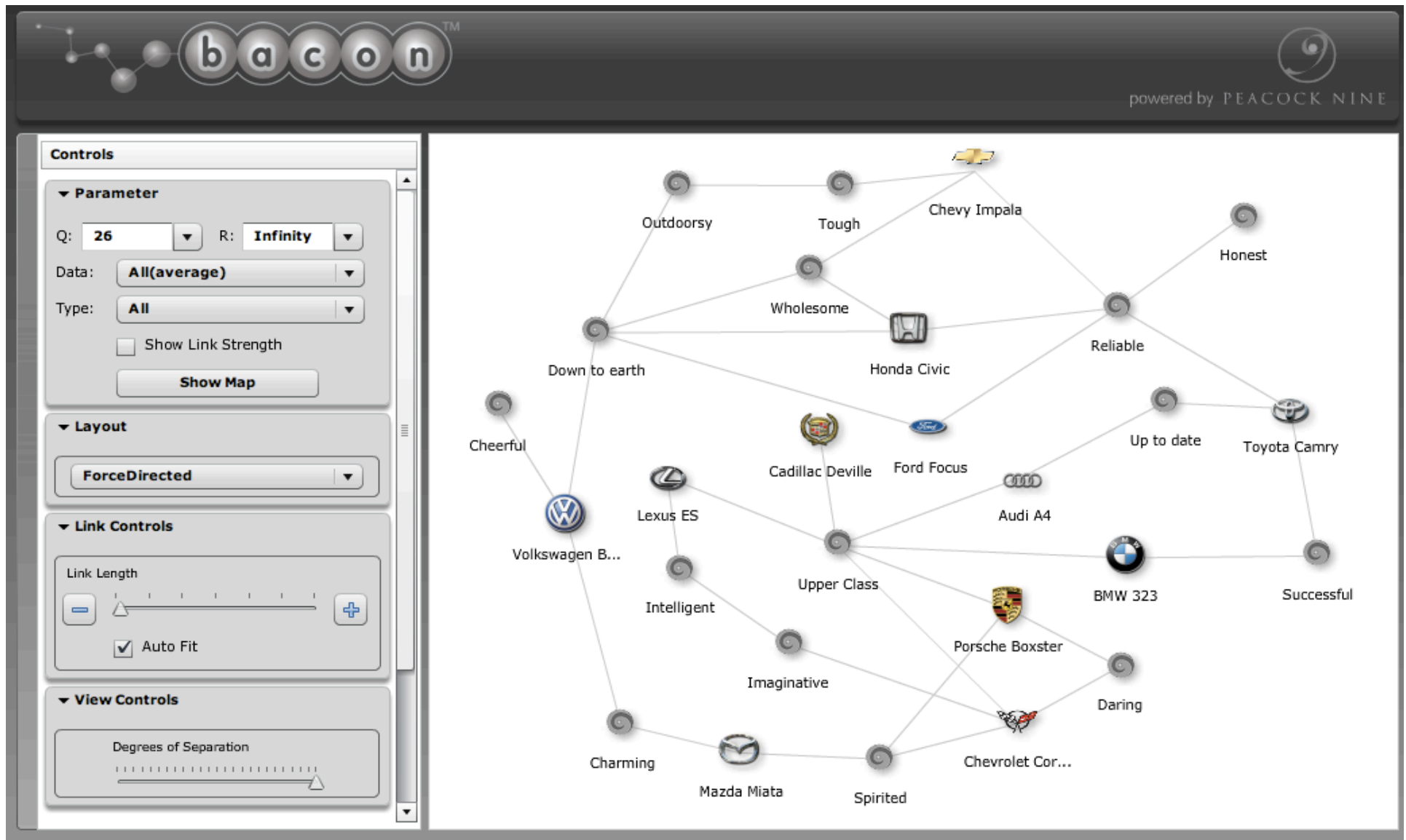


Which also sheds light on how our most “internal” stakeholders view the Wofford brand and the college’s current brand position.

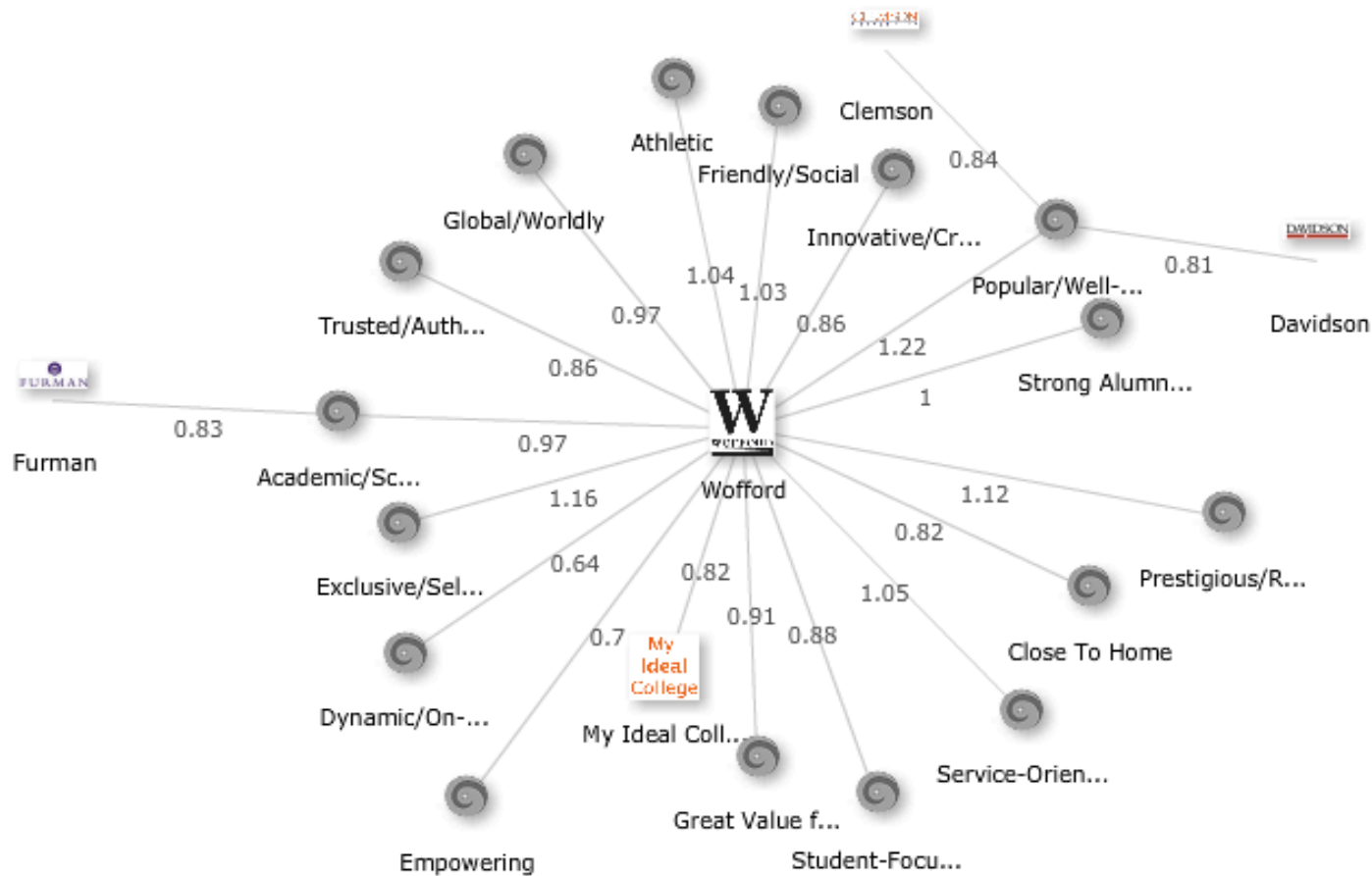




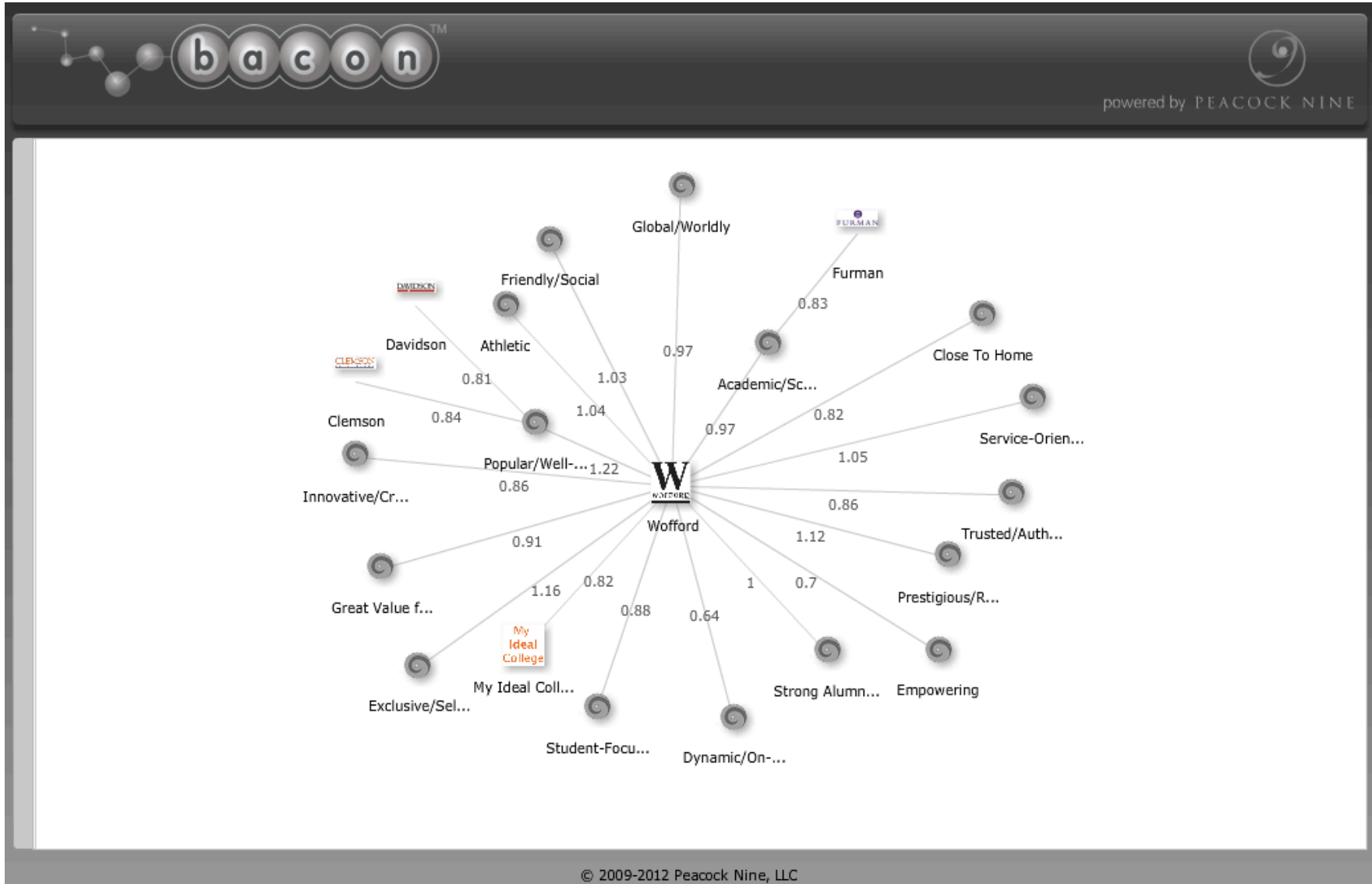
Notably, rather than a network of interlinked brands and equities...



Wofford's most "internal" stakeholders see Wofford as the "center of the universe"—the bar by which all others are measured—

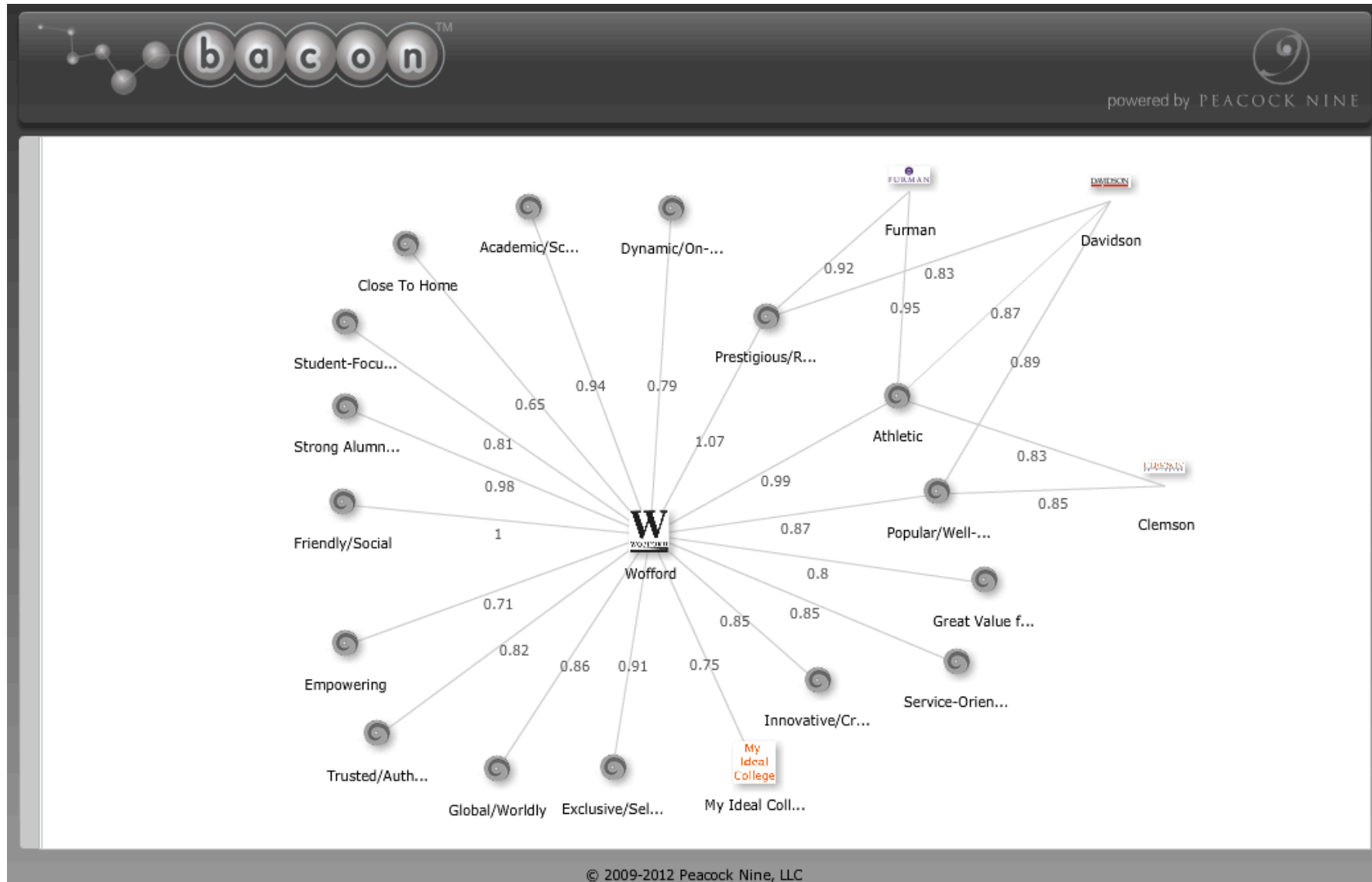


# whether from the current students' perspective...



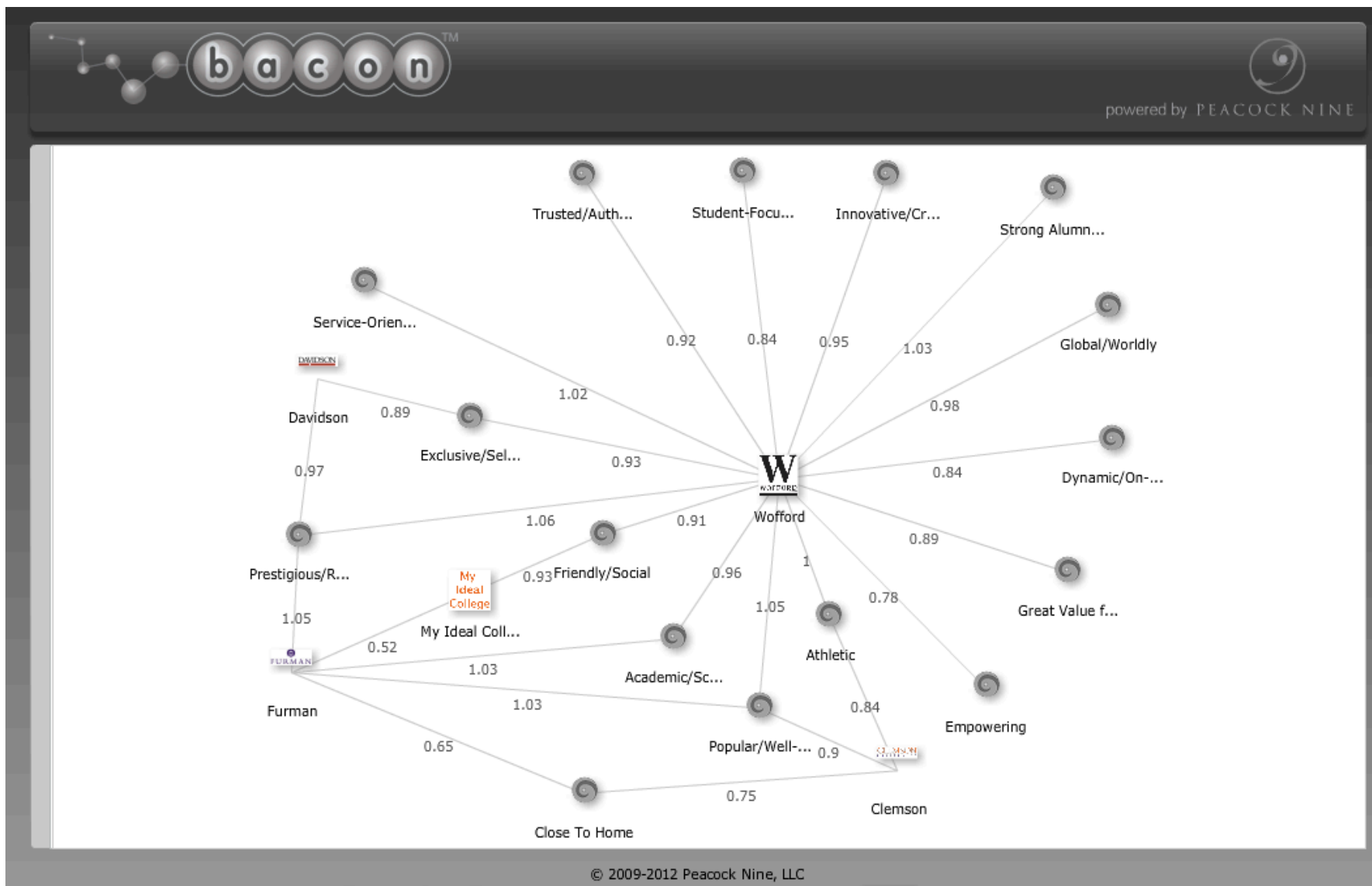
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...that of the alumni



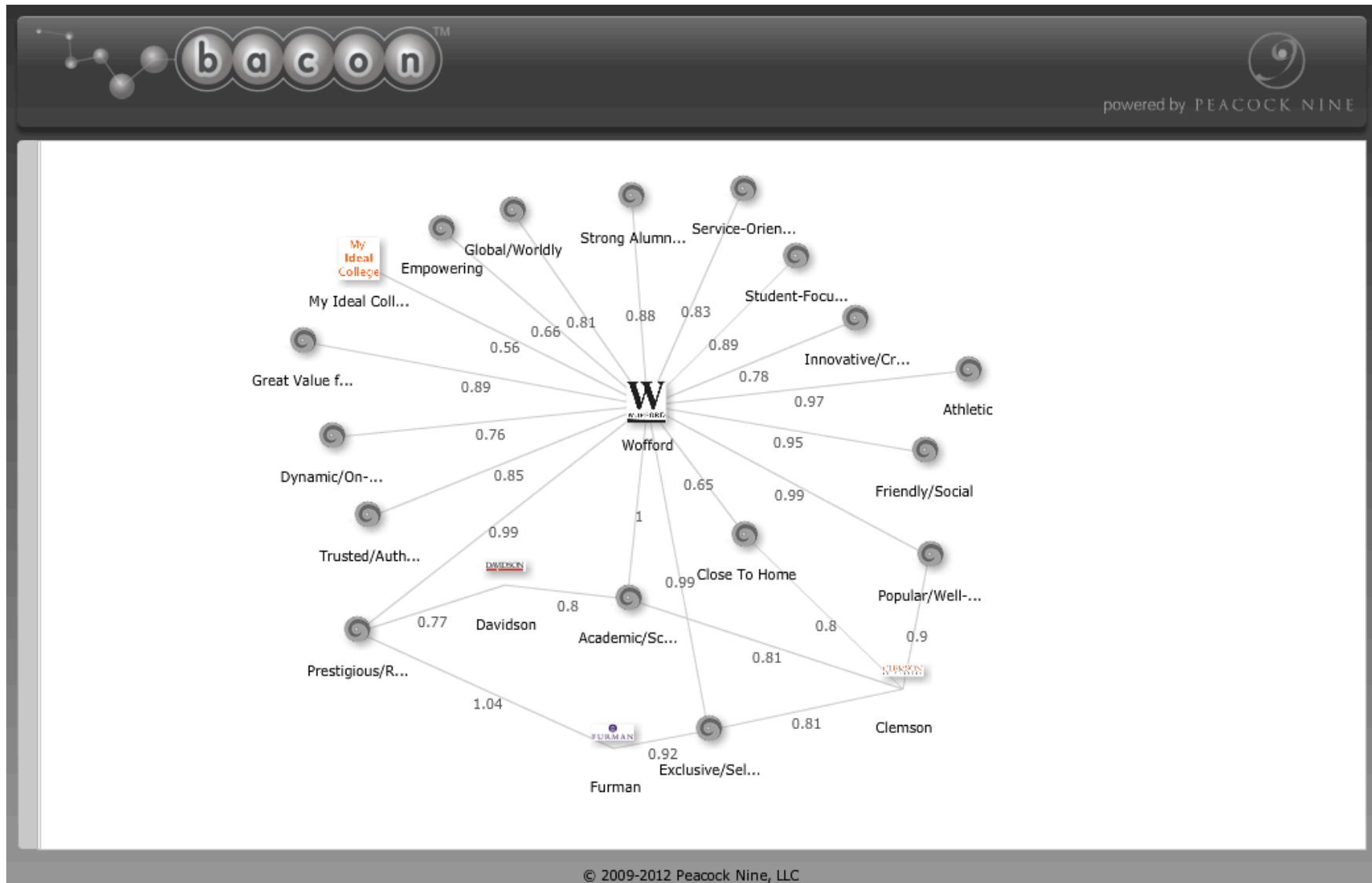
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# the point of view of the faculty / staff...

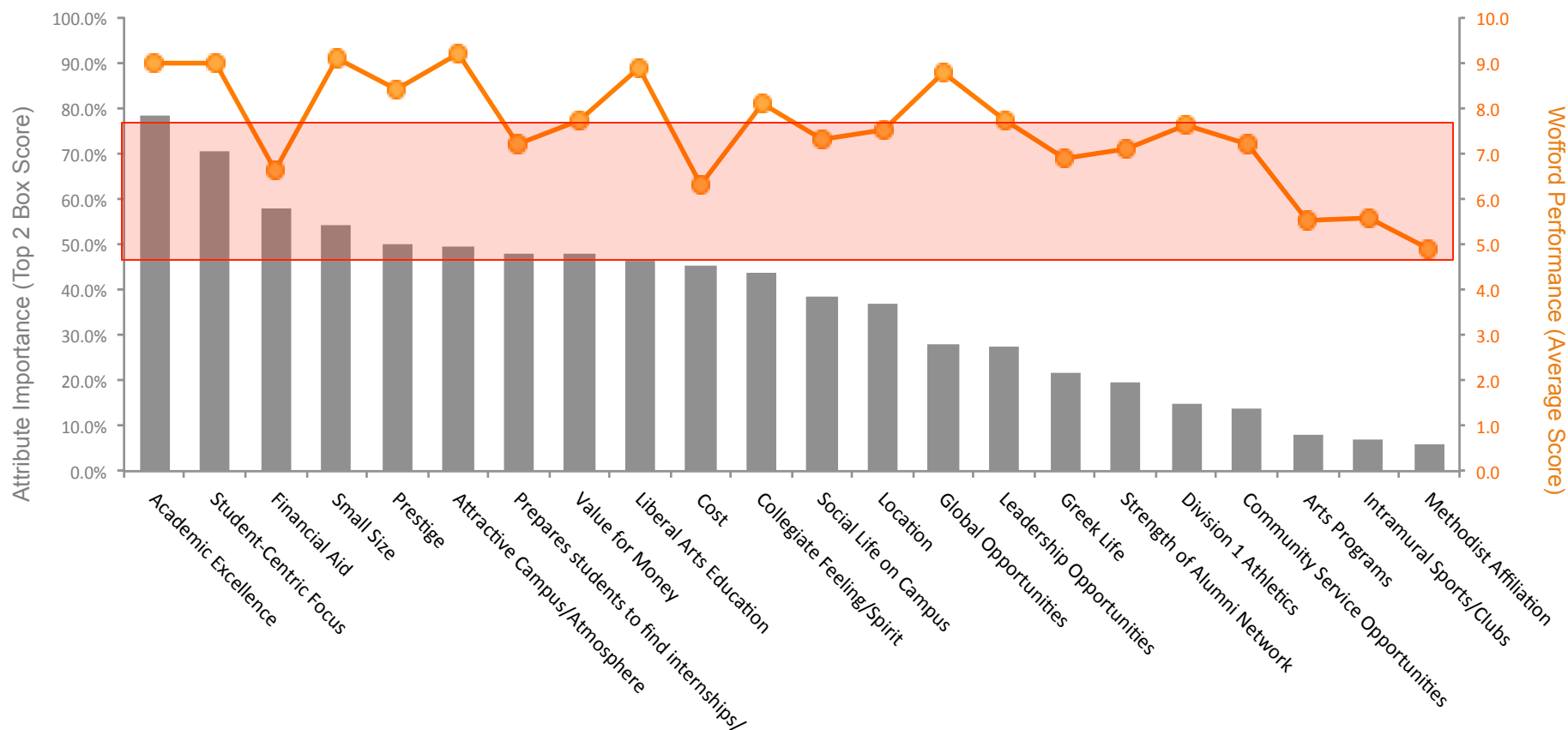


© 2009-2012 Peacock Nine, LLC

...or even the parents. The network, brand position, and “view” is largely the same.



However, despite the rosy view of Wofford that those close-in “internal” stakeholders share, there are opportunities worth exploring.

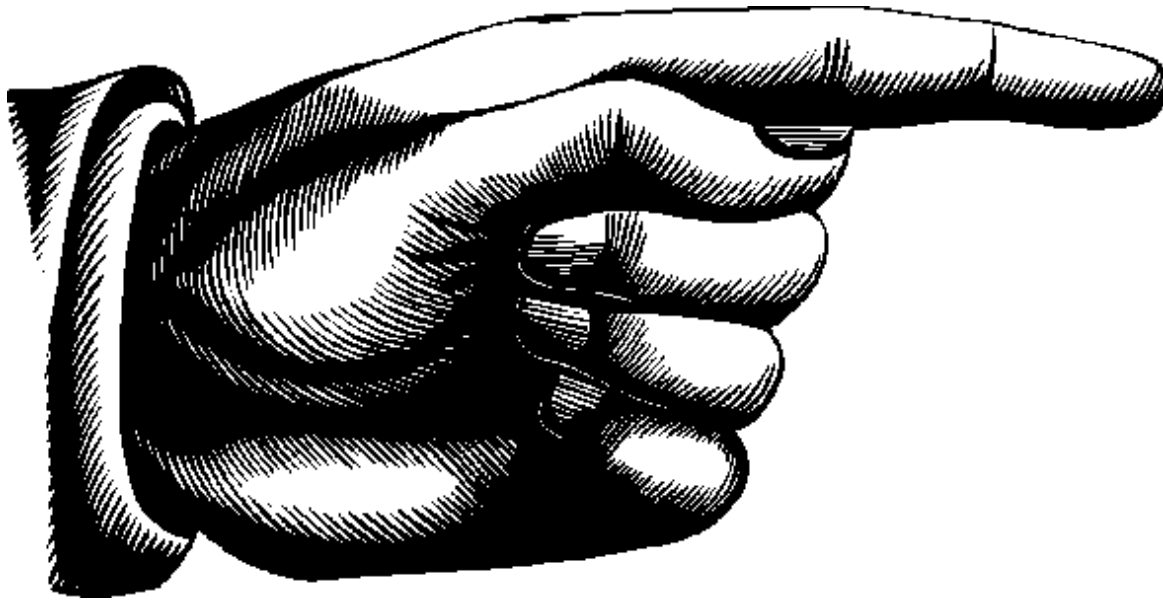


Q48. Thinking back to when you were deciding which undergraduate college/university to attend, how important were the following attributes to you? (BASE: Current Students & Alumni; n=939)  
 Q51. How well do you feel Wofford College currently delivers across each of the following attributes? (BASE: All Internal Segments, n=1277)

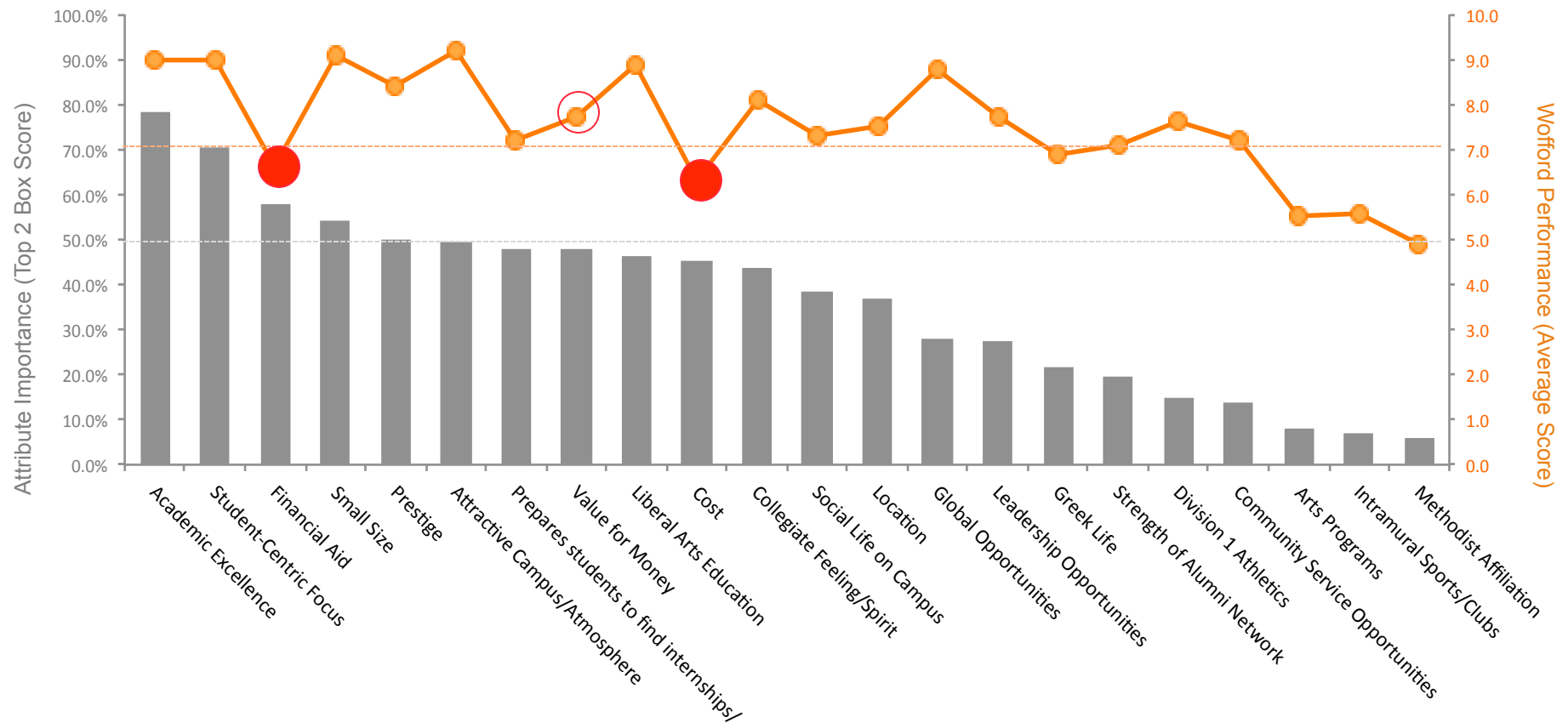
# Opportunities



The opportunities in areas such as “cost”, “financial aid”, and “the arts” were clear and supported widely.



# “Internal” stakeholders expressed discontent regarding the cost of attending Wofford and insufficient financial aid.



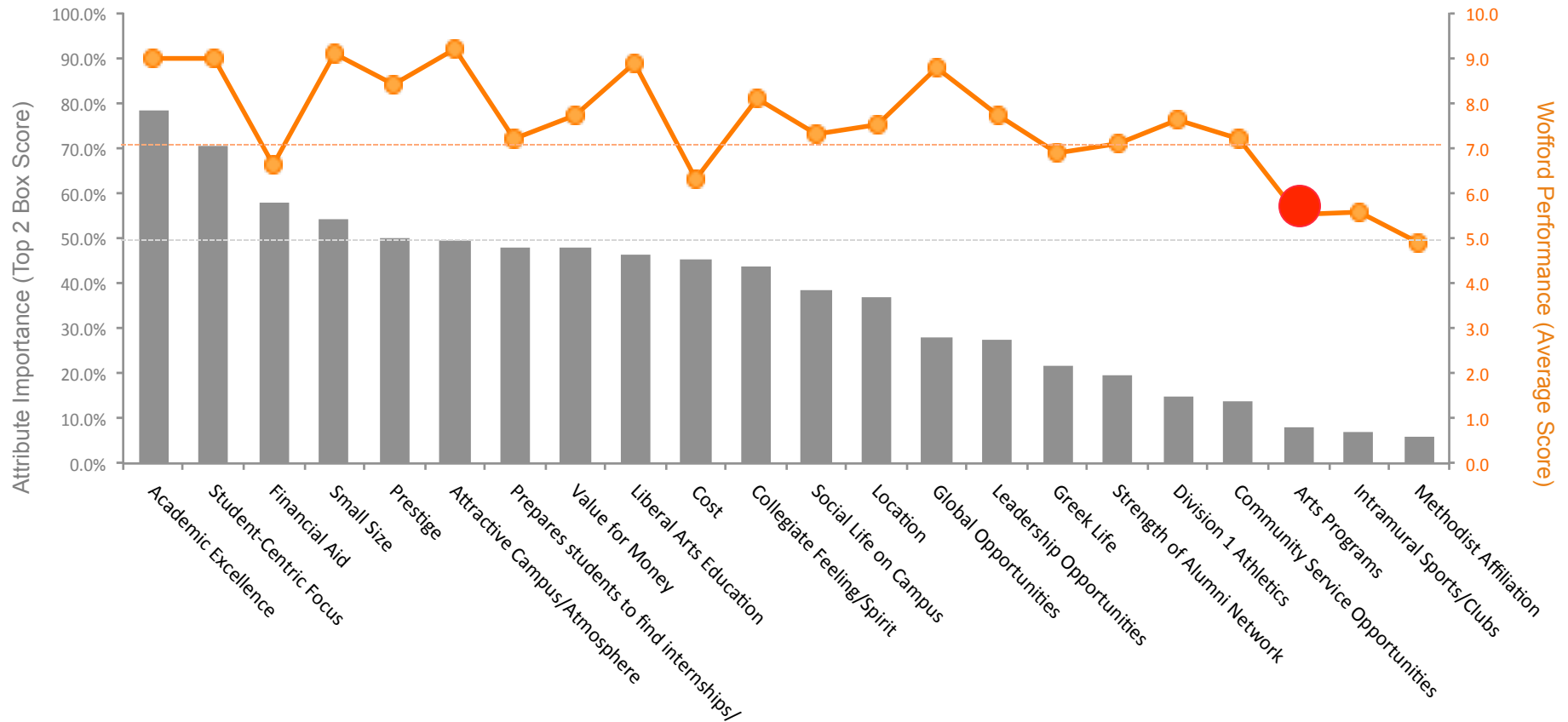
Q48. Thinking back to when you were deciding which undergraduate college/university to attend, how important were the following attributes to you? (BASE: Current Students & Alumni; n=939)

Q51. How well do you feel Wofford College currently delivers across each of the following attributes? (BASE: All Internal Segments, n=1277)

They suggest that the rising cost of Wofford is a competitive disadvantage that could erode both Wofford's reputation and the "Wofford experience".

- ✓ Average satisfaction scores for these Cost and Financial Aid were 6.3 and 6.6, respectively (4th and 5th lowest of all attributes). With the notable exception of trustees, all respondent segments indicated that the cost of tuition at Wofford was too high and that financial aid was insufficient.
  - *"When I was in high school and saw how much Wofford's tuition cost was, I was immediately deterred. I felt like there was no way I would ever be able to get enough money to be able to attend school here." (Faculty/Staff)*
  - *"[I would change...] **the cost**. The high, and rising, cost of Wofford makes it more and more difficult for students from the middle class to attend Wofford because they qualify for less financial aid and fewer scholarships and these students are essential to the Wofford community." (Current Student)*
  - *"**I would find a way to stop raising tuition on students**...Tuition has continued to increase virtually everywhere and in order to go to a college like this, it is difficult for some families that do not come from a lot of wealth." (Current Student)*
- 
- echoed by prospective students*
- *"Paying \$50,000 each year for undergraduate is very unreasonable...in this tight economy." (Prospective Student)*

“Internal” stakeholders also suggested that Wofford’s somewhat stunted arts program deserved attention.



Q48. Thinking back to when you were deciding which undergraduate college/university to attend, how important were the following attributes to you? (BASE: Current Students & Alumni; n=939)  
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# They suggested that the program puts Wofford at a disadvantage.

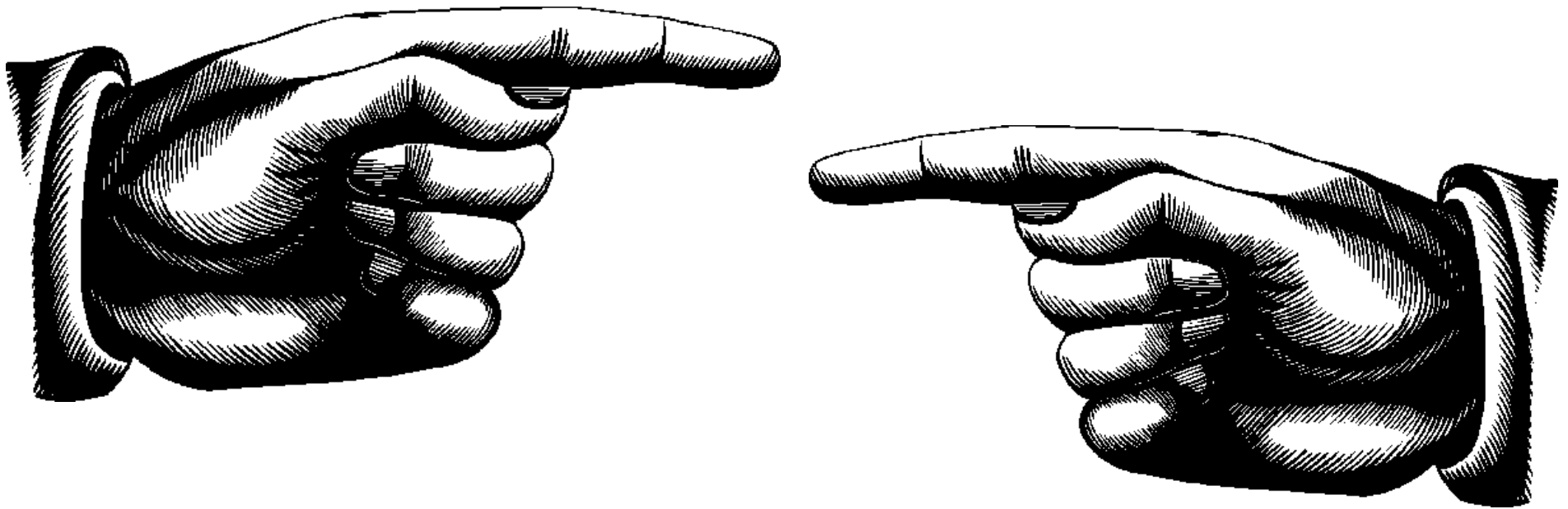
- ✓ Arts programming was relatively less important to most Wofford students (average score of 3.6 out of 10), although we will never know how many artistically-inclined prospective students have opted-out of Wofford. Nonetheless, satisfaction scores for the arts program among internal stakeholder groups were low (5.5) and several respondents indicated they'd like to see additional improvement in this area.

- *"I would definitely **offer more fine arts programs.**" (Alumni)*
- *"I think there is a **need for artistic specific majors** (not just art history and theatre) on campus." (Current Student)*
- *"Consider more majors – I hear from folks that they are **surprised that Wofford doesn't have a music major.**" (Alumni)*
- *"**I also thought about going into music, so I was more focused on Furman than Wofford for a very long time.**"  
(Current Student)*
- *"**I would hope that Wofford becomes a unique example of academic excellence, known around our region and nationally, a thriving home for the arts...**" (Faculty/Staff)*

*echoed by prospective students*

- *"I think Wofford would do better to include more of an artistic aspect in their school. When I think Wofford, I think of it as an academic school, without a strong commitment to sports or arts...I think Wofford could use more arts." (Prospective Student)*
- *"For me, as a performer, USC presents the greatest fine arts related school...Furman would be my second choice, again for its contributions to fine arts." (Prospective Student)*

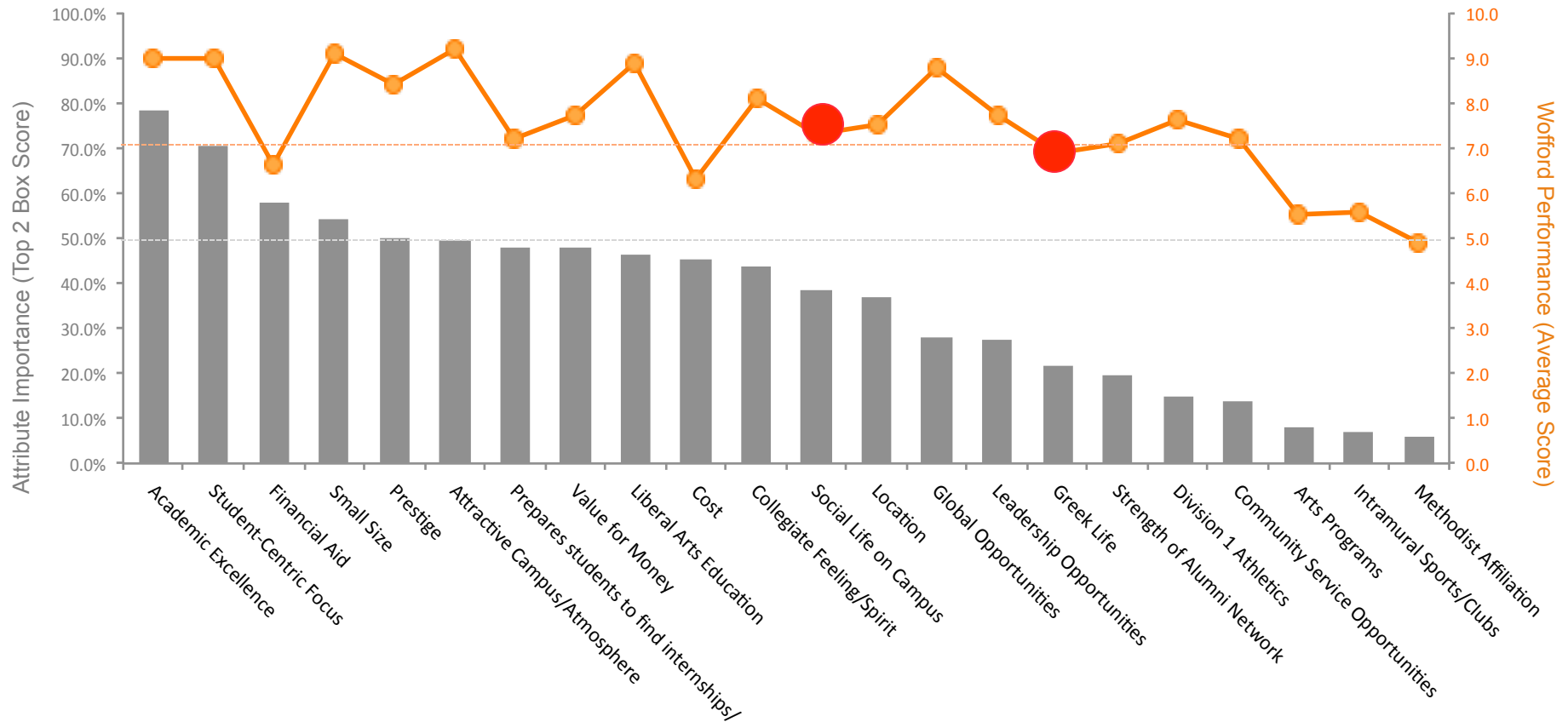
However, other opportunity areas for Wofford were muddled by opposing points of view.



# Greek

versus

# Non-Greek



Q48. Thinking back to when you were deciding which undergraduate college/university to attend, how important were the following attributes to you? (BASE: Current Students & Alumni; n=939)

Q51. How well do you feel Wofford College currently delivers across each of the following attributes? (BASE: All Internal Segments, n=1277)

# Greek \_\_\_\_\_ versus \_\_\_\_\_ Non-Greek

✓ “Greek Life” received an average satisfaction score of 6.9 and appears to be a somewhat polarizing part of the Wofford experience. Arguably a less important criteria for prospective students than “social life”, it is a divisive topic surrounded by great passion—and worthy of investigation/improvement.

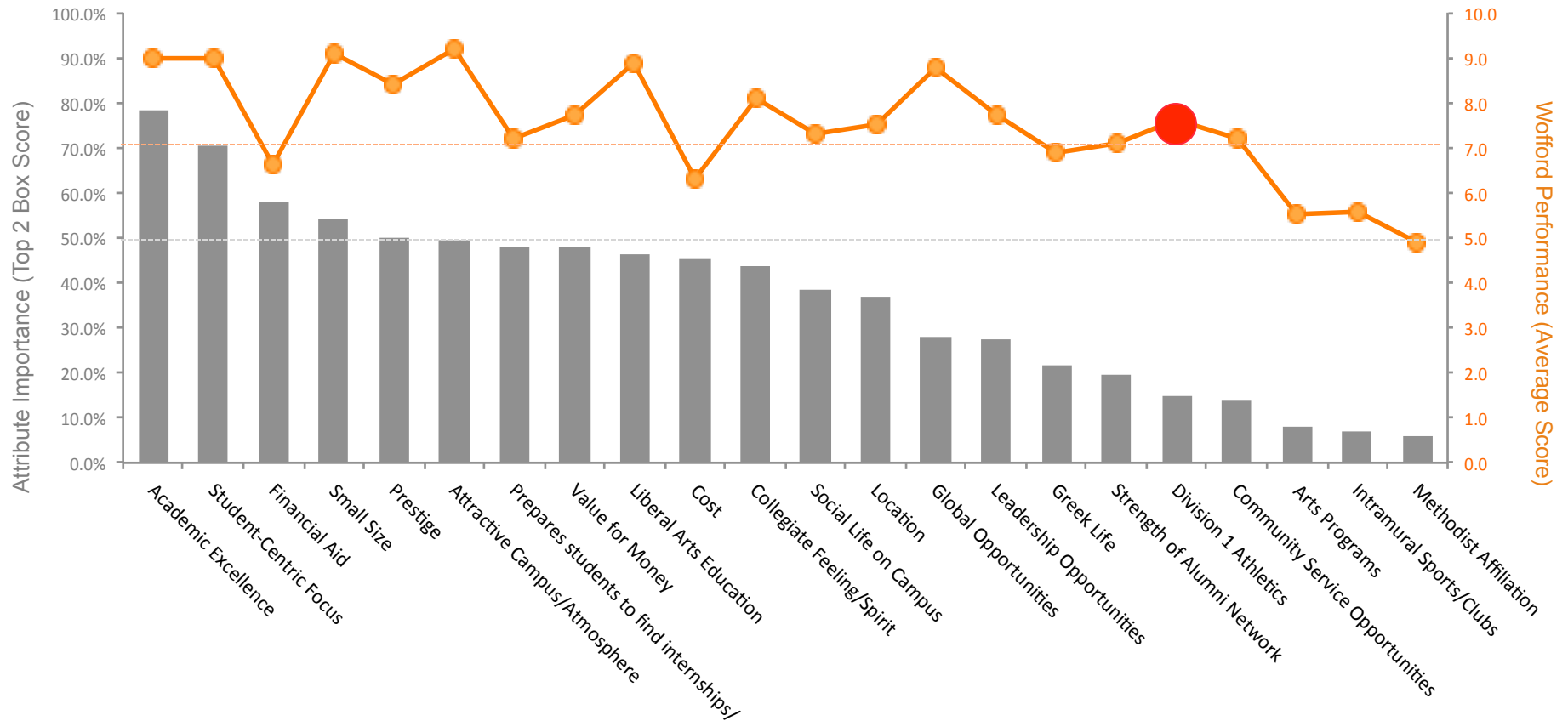
- *“Wofford clearly has a reputation as a ‘largely’ Greek college and has been recognized as such by college review magazines. **This is something Wofford does well** and should continue to strive to do well as it brings in applications and high-caliber students.” (Alumni)*
- *“It feels like there’s a **juxtaposition with a lot of the ‘cool’ kids in Greek organizations with the independents and athletes at times left to fend for themselves**...Get some of the focus off the Row and it might help Wofford improve its image as a school that only caters to Greeks a bit.” (Current Student)*
- *“Wofford had a bit of a **reputation for being ‘fratastic’** so I wasn’t sure if the Greek scene would completely rule the school or not, but my experience has been a **nice balance of academic, social, and athletic life.**” (Current Student)*
- *“**Quit ignoring the rift between the Greeks and the faculty.** Move rush to January/Spring semester, and communicate to the Greek system that academics absolutely come first, and skipping classes/labs/work for Greek events will not be tolerated.” (Faculty/Staff)*
- *“I would like to have the **college stop interfering** as much with Greek Life” (Current Student)*
- *“If I could change one thing about Wofford, I would make there be **less of an emphasis on Greek life**...” (Current Student)*
- *“I don’t mean to give the impression that the whole campus was **Greek vs. non-Greek, but sometimes it felt that way**” (Alumni)*  
*echoed by prospective students*
- *“I also think Wofford does a good job emphasizing academics, and I’ve also known it’s Greek life to be fairly extensive which interests me to a certain point.” (Prospective Student)*
- *“...when I was there I couldn’t help but notice how their were cliques, you know the greek kids with the right clothes and phones and everything and then the kids in the labs and libraries....” (Prospective Student)*



# Over Emphasis On Sports

versus

# De-Emphasis On Sports



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## Over Emphasis On Sports

versus

## De-Emphasis On Sports

- ✓ “Internal” stakeholder comments indicate there is considerable disagreement on the extent to which the college should focus on athletics. It provides both a sense of pride and source of exposure...
- **“Our athletics are one of the things I am absolutely most proud of at Wofford. I brag about our scholar-athletes to my colleagues at other institutions. I love, love, love that the message that comes down from the director and from all the coaches is—go to class. Do your work. You’re a student first, and we’ll make that work.”** (Faculty/Staff)
- **“Exposure and marketing are key** elements in helping the college to be successful, especially in athletics! ...the more you **get your name out there**, the easier it is to compete with schools like these [big].” (Faculty/Staff)
- “I feel there is still a **great deal of potential to continue building the Wofford brand through athletics** and in my opinion there is no reason Wofford athletics cannot compete for SoCon championships across the board.” (Alumni)
- “As a faculty member, I have not focused much on athletics but **I do believe our athletic programs add to the reputation of the college...[they] do help build the Wofford ‘brand’** ...I suspect our athletic programs are also heavily responsible for much of the diversity in the student body to-date.” (Faculty/Staff)

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echoed by prospective students

- **“Increase its school by marketing and advertising. Most of that is done through sports...It’s nice to know that you went to a big name college. Never good to be a secret.”** (Prospective Student)

# Over Emphasis On Sports

versus

# De-Emphasis On Sports

- ✓ ...and is viewed as a somewhat exclusive distraction.
- “I would tell them to **keep attempting to boost student involvement** with athletics...**I would remind them to emphasize the student part in STUDENT-athlete** and that when we step on the field, we represent our college the right way and not show a win-at-all costs mentality.” (Current Student)
- “**Athletics are really only strong for football** and over the **past three years basketball**. WAR is still trying to get students in support of the less attended sporting events but for that to be successful more students need to be on track with it.” (Current Student)
- “All of the big schools have a team. You wear the t-shirt for the team not for the curriculum.” (Alumni)
- “**Reduce emphasis on athletics.**” (Alumni)
- “**Weakness...over emphasis on athletics.**” (Alumni)
- “One criticism is to say that **it would be nice to be asked for funding for something other than athletics**...if I had enough money I would establish a fund for someone like me—who was not Greek, was not an athlete...[but who] was a strong student and a solid student leader.” (Alumni)

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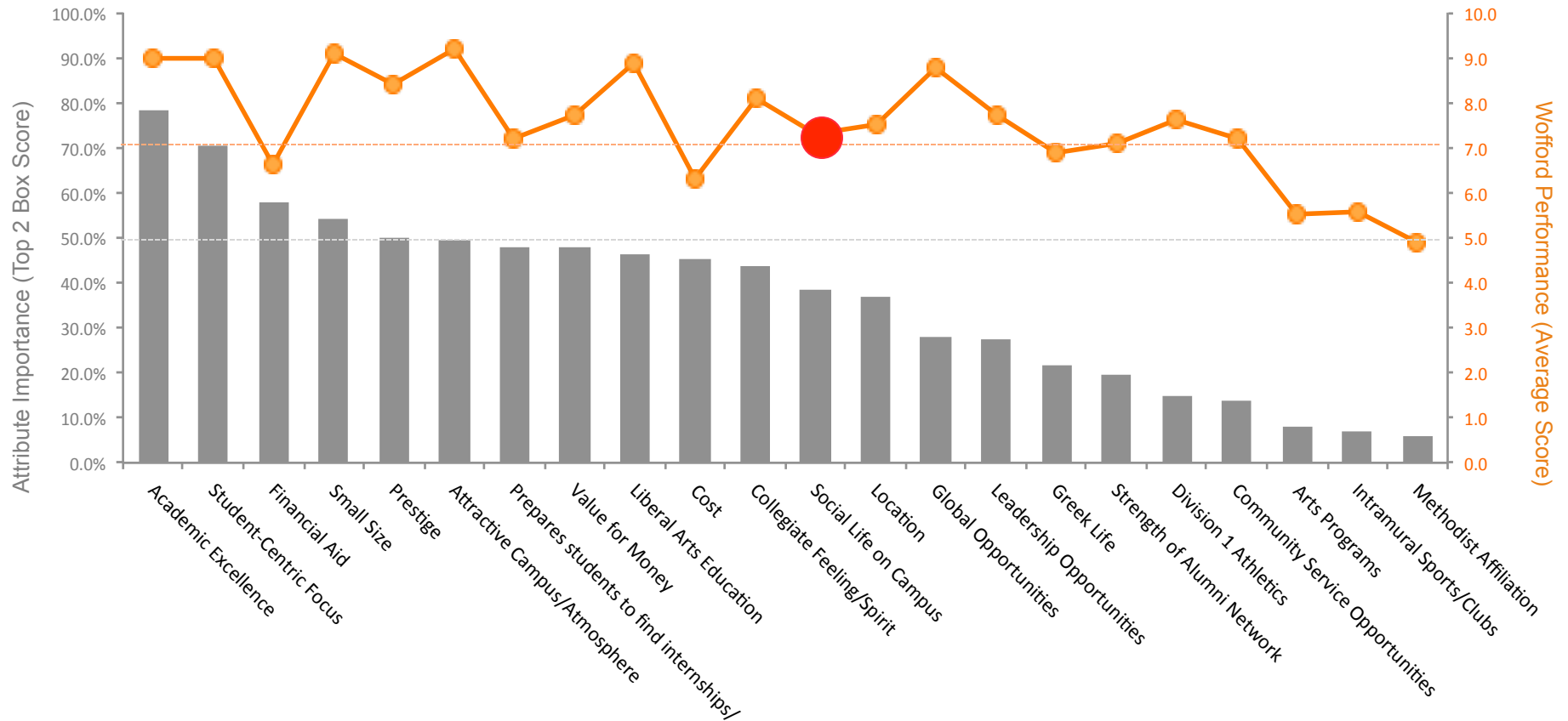
echoed by prospective students

- “Personally, I don’t like to see such focus on sports during my academic years, and this is where Wofford and Davidson look better than Clemson. As far as Davidson and Wofford go, I think they are both somewhat similar schools.”
- “While I think an emphasis on sports might steer it away from its intentions, I think Wofford could use more arts.”

# Tradition

versus

# Diversity



Q48. Thinking back to when you were deciding which undergraduate college/university to attend, how important were the following attributes to you? (BASE: Current Students & Alumni; n=939)  
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# Tradition

versus

# Diversity

- ✓ Numerous comments suggested that the “Wofford experience” is perceived to be more positive for Caucasian male students than the rest of the student body. Many respondents challenged Wofford to focus on increasing diversity in the years ahead.
- “I think that **a weakness of Wofford is the lack of diversity among the student body**. Although we do have minorities in campus (and many of them are involved) this is a small number...” (Current Student)
- “**There is merit in a diverse student body and that is not Wofford’s strongest suit**...the student body as a whole is more similar than different on Wofford’s campus. Fostering diversity and interaction on campus will only improve the graduates of Wofford as they move on to the next phases in their lives.” (Alumni)
- “Indeed, **southern, white male students wearing bow ties** to football games was graphically represented on the website. The majority of the **faculty members were white, male** and many had completed their undergraduate degrees at Wofford. **My initial impression was that this school values and wants ‘their own kind’**.” (Faculty/Staff)
- “There **needs to be a major push to make the school more inclusive of diverse students, staff and faculty**. The administrations at the top must also reflect this diversity. Who, after all, are the senior female and minority administrators at the college?” (Faculty/Staff)
- “I think the student body **needs to be changed to be a more ‘diverse’ group of people**. I think Wofford Admissions has been actively trying to change this over the last 4-6 years, but during my time at Wofford, especially as a freshmen, **I felt very isolated because I was from a different socio-economic class** than most other Wofford students...” (Alumni)

# Homogeneity

versus

# Diversity

- “The student body is heavily from South Carolina and surrounding states and, as such, is rather homogenous and conservative. **The white, upper middle class fraternity or sorority member from a conservative, southern home is alive and well at Wofford.** While diversity in the student body has certainly increased over the last five years, we still have a long way to go.” (Faculty/Staff)
- “Lack of diversity in the student body and faculty. When I was at Wofford, most of the other students looked like me. Most of the world does not look like me. There needs to be a big push to bring in more students and faculty who have a wide variety of viewpoints...” (Alumni)
- “**Diversity would really enhance the Wofford experience.** When people meet others who are not like them, it really pushes them to grow. It also exposes people to new ideas and ways of thinking, which I feel is a large part of college. Being exposed to different ways of thinking can enhance our critical thinking skills.” (Current Student)
- “We should strive for more diversity at all levels of the college, and we should have conversations about how we embrace pluralism FOR achieving our enduring purposes.” (Faculty/Staff)
- “A boost in the diversity of the student body would be nice (which I feel the college has definitely worked towards since I've been here) and help rid Wofford of the stereotype that many Southern schools have of being a bit backwoods... There needs to be some progress among the students as far as acceptance of others.” (Current Student)
- “**We have to prioritize diversity—on the Board, among the faculty, among the students...**Diversity brings with it flexibility, awareness, perspective—all of which are things that will help us survive and improve over the coming years.” (Faculty/Staff)

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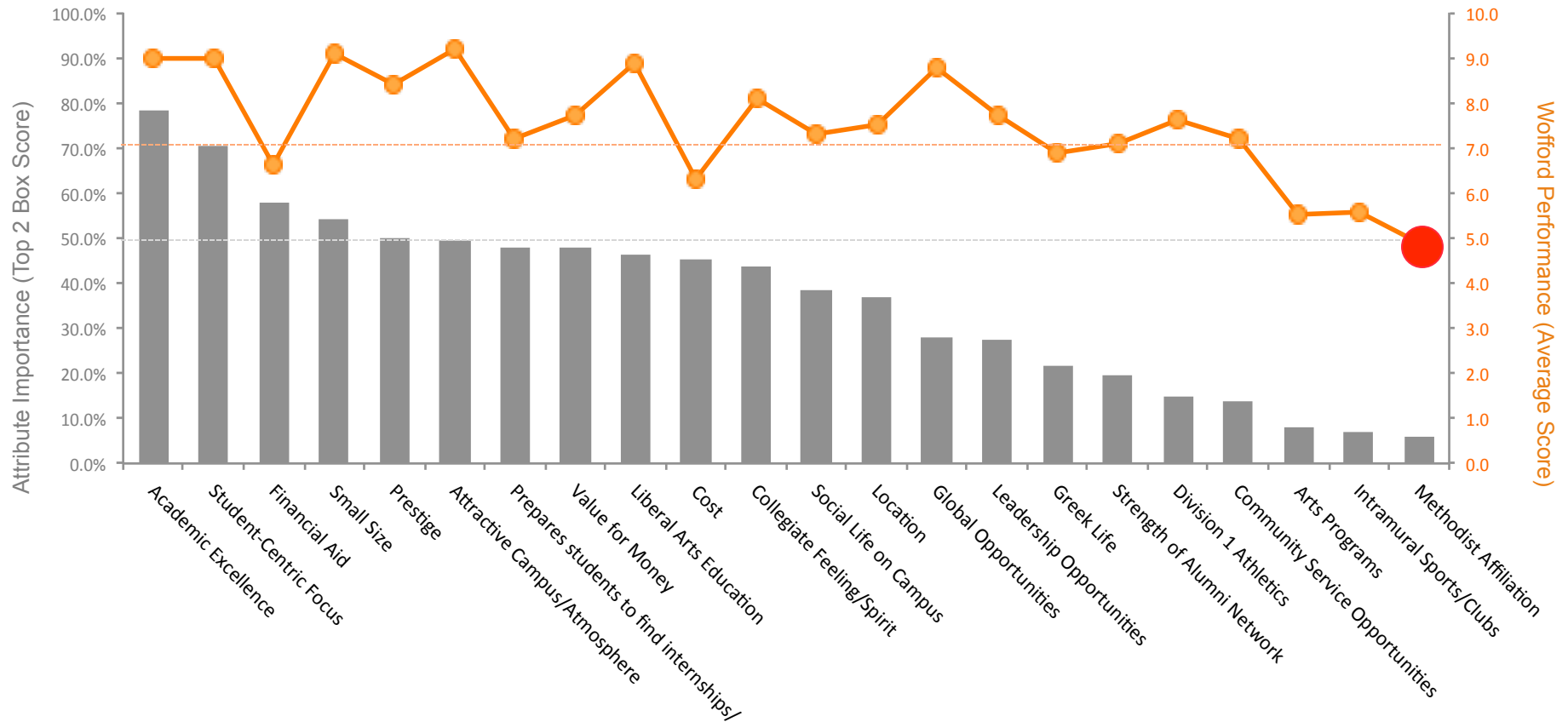
echoed by prospective students

- “When I'm searching for a school, I think it closes itself off to diversity when it maintains restrictions like religion and even some of its southern ideals.” (Prospective Student)

More  
Methodist

versus

Less  
Methodist



Q48. Thinking back to when you were deciding which undergraduate college/university to attend, how important were the following attributes to you? (BASE: Current Students & Alumni; n=939)  
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# More Methodist

versus

# Less Methodist

✓ Respondents seem confused by the Methodist affiliation. Some feel it should be emphasized more. Others feel that it is “limiting”. Perhaps most importantly, they feel there are conflicting messages on campus.

- *“I feel religion is too strong a part in certain ceremonies” (Current Student)*
- *“Some faculty, myself included, believe it inappropriate to give a Christian bible to students who are atheists, Muslims, Jews, etc. The administration, perhaps because of the ‘historical’ Wofford as a Christian institution, insists that no other book may be given to students of other faiths or no faith, stating ‘they can return the bible if they do not want it.’ This seems myopic to me, but I suspect results from the need to hold onto the past for alumni and the Board.” (Faculty/Staff)*
- *“I remember a faculty member once telling me that it was so nice to work at a place where he/she didn’t have to hide their faith (because at larger institutions they would be ridiculed for their faith).” (Alumni)*

*echoed by prospective students*

- *“Its Methodist affiliation—I would like to go to a school with no affiliation in the hopes of one particular religion not interfering with my school experience, and meeting a more diversified body of people.” (Prospective Student)*



# More Methodist

versus

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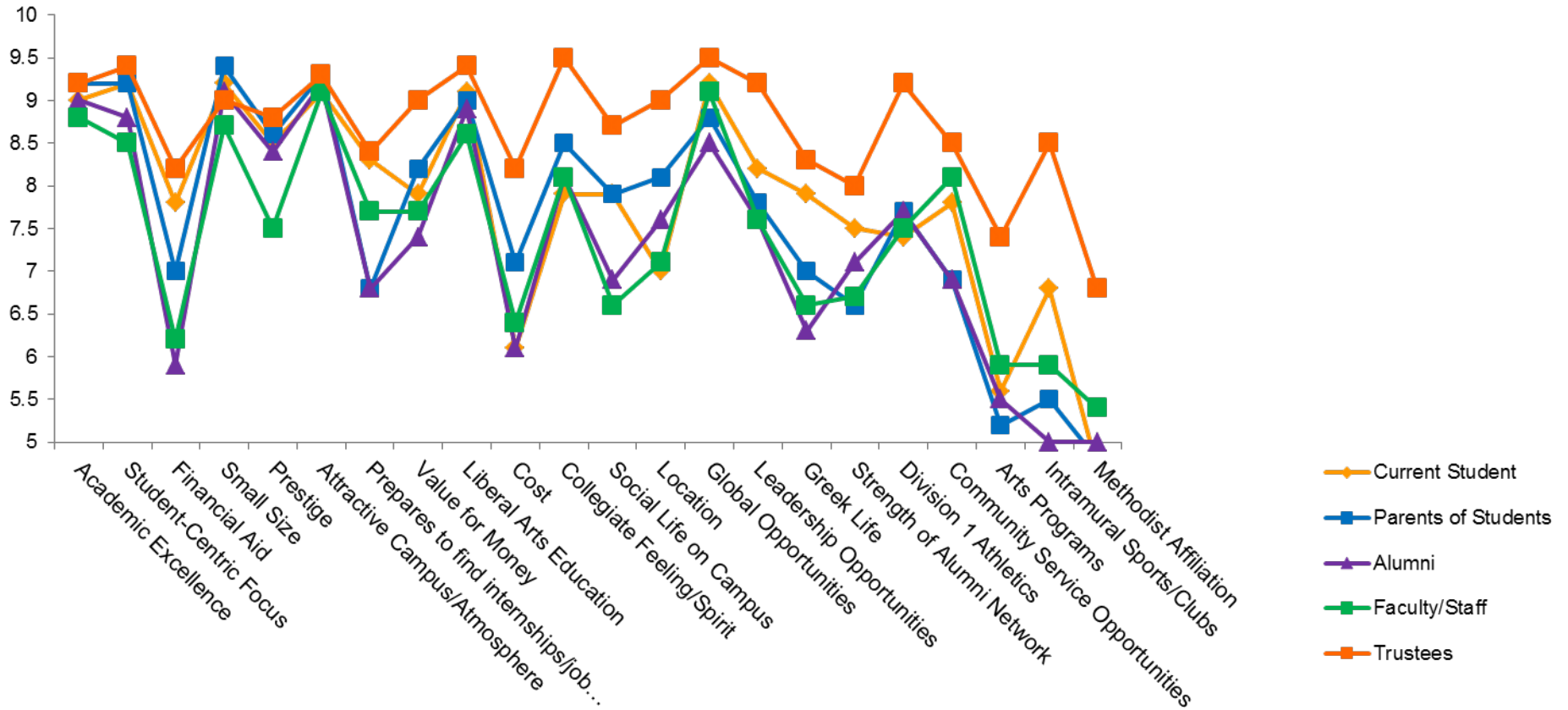
# Less Methodist

- “The one thing I would change about Wofford College is a **return to the Methodist principles** that the college was founded on.” (Current Student)
- “I would continue to **push the Methodist founding values** of the college” (Current Student)
- “For a Methodist College that receives Methodist support that has a Methodist congregation 2 blocks away **there is virtually NO Methodist opportunity for students**. Where is the Methodist student fellowship? Where is the connection to the local church????” (Parent)
- “I also wish that as a Methodist school, Wofford would **allow students Good Friday and the day after Easter off so religious students could spend this time with their families**.” (Current Student)
- “**I think we need to keep the Wesleyan ideals of doing all that we can, for as many as we can, as often as we can**, etc. I think we need to make a concerted effort to help our students, our community, and beyond recognize that these are not uniquely Southern, uniquely Christian, or even uniquely religious values...We need to build anew the idea that entwining moral and intellectual development into the same educational experience does not necessarily require a religious world of any sort and most certainly should not be limited to a single religious world view.” (Faculty/Staff)

Understanding this, which opportunities do we pursue first?

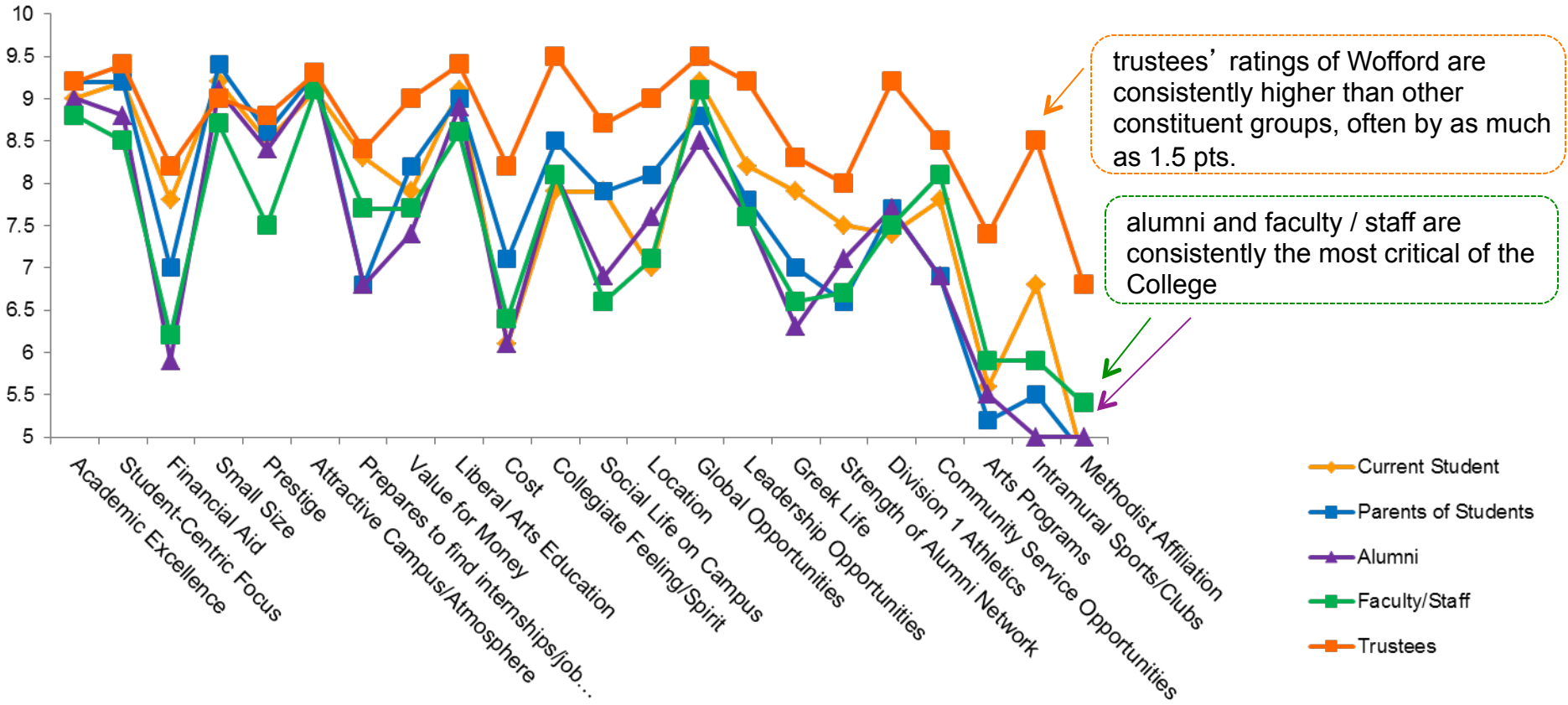


# Strategically, it depends upon where the college can deliver the greatest value...



Q51. How well do you feel Wofford College currently delivers across each of the following attributes? (BASE: All Internal Segments, n=1277)

...for those who matter most.



- Why the difference between trustees and faculty/staff?
- Why the difference between trustees and alumni?
- How significant are the differences? What are the largest points of contention?
- Where do their visions for Wofford align and where do they diverge?

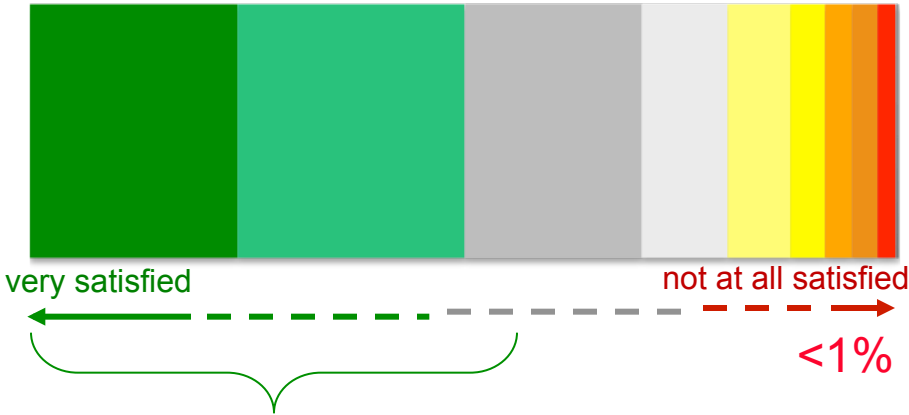
Q51. How well do you feel Wofford College currently delivers across each of the following attributes? (BASE: All Internal Segments, n=1277)

# Unpacking The “Wofford Experience”: Opportunities by “internal” stakeholder group



The overwhelming majority of current students are particularly pleased with their “Wofford experience” ...

Satisfaction with Undergraduate Experience



49%

✓ In fact, 65% state that they would be extremely likely to recommend Wofford to a friend or family member considering colleges



...and it shows

## In their own words...

- “When I first visited Wofford, I was amazed at how friendly the students were and how gorgeous the campus was. I came late fall so the weather was nice and people were tailgating and going to a football game. My dad and I ended up sitting in the alumni section at the football game because it was in the shade. Everyone started talking to us and asking me what I thought about Wofford, if I had anymore questions, where else I was applying, etc. They also told me about what great connections they made through Wofford and how they would do it all over again if they could since their experiences were so wonderful. My expectations were definitely met. I wanted a small college, where students and professors had one-on-one interaction, where you were free to propose new ideas or interim projects, where you were not just a number, but an active member of the community and where I could get involved in many different organizations, but no one organization would define who I was and who I should hang out with.”
- “Even though people may underestimate Wofford, it definitely holds its own in comparison to [other] schools. Not only does it have a great academic program, but it also is competitive in sports and fosters a wonderful campus for students to thrive in. Nothing can compare to the ‘Wofford experience’”

## Their most pressing concerns are familiar

Cost

Location

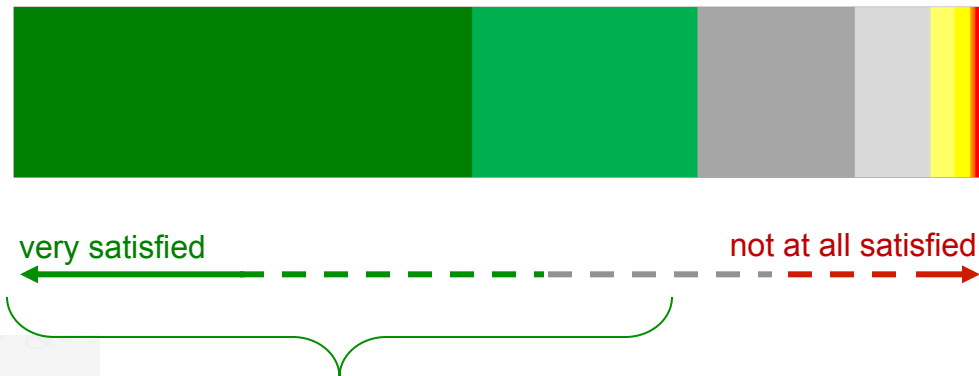
Greek Life

Diversity

Methodist  
Affiliation

# Alumni remember their time at Wofford quite fondly...

Satisfaction with Undergraduate Experience



70%

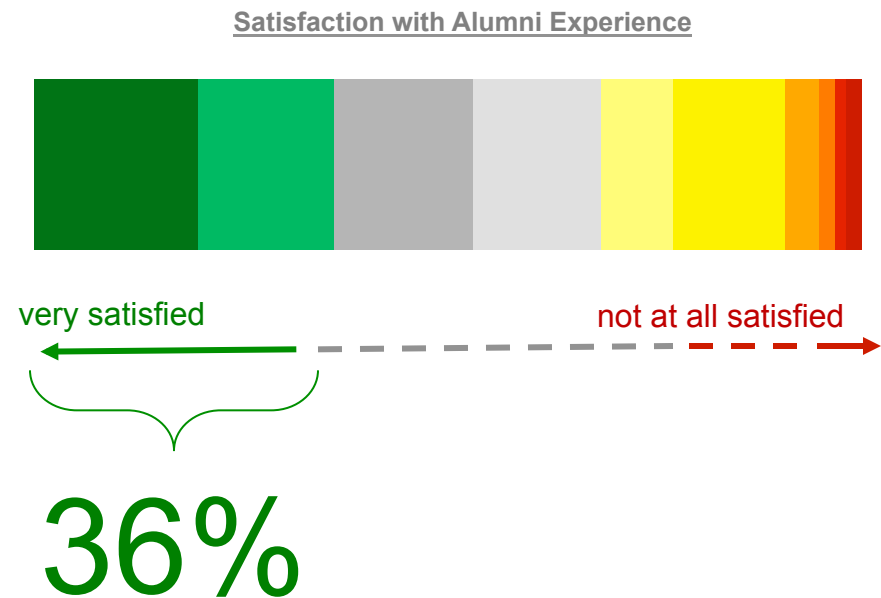
“*[Wofford is...] the greatest place on Earth. The students study hard during the week, but have tons of fun on the weekends. I met my best of friends at Wofford and had the time of my life, but it also prepared me extremely well academically for my future in graduate school.*”

Q42. How satisfied were you with your undergraduate experience while attending Wofford? (BASE: Alumni, n=612)



...but are less enthusiastic about their experiences as alumni.

- ✓ Very few are “highly involved” with the school (9%).
- ✓ Over 25% said they are “not at all involved” with the college.
- ✓ Although they are likely to “keep up with Wofford news and events” (83%), “donate” (74%) and “attend sporting events” (54%), they seem to feel a bit disconnected.
- ✓ While physical distance from Wofford is the primary “involvement barrier” for many of our alumni/ae, others are looking for ways to feel (and be) more involved.



# Key question— How do we enhance their alumni experience and increase their involvement with the college?

## In their own words...

### Just Ask

*“Ask me to serve in an active role or on a meaningful committee.”*

*“I’ve made numerous inquiries over the years to volunteer to increase alumni activity in my area... [with not much traction]”*

### Make It Convenient For Them

*“[if Wofford wants me to be more involved with the College...] 1. Have/offer activities in the community in which I live. 2. Have activities at Wofford to which I am invited are held on days of the week when I might actually be able to attend. Invitations frequently are for the middle of the week. It almost seems that they are planned to hold down attendance from alums who do not live in S'burg area.”*

Q43. Since your graduation from Wofford, how satisfied have you been with your experience as a member of the Wofford alumni community? (BASE: Alumni, n=612)

## Beyond “involvement”, what other opportunities did alumni responses bring to light?

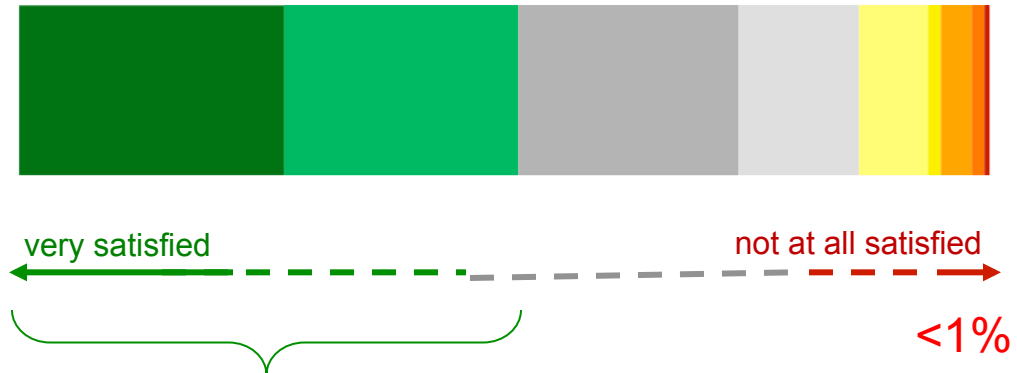


Although alumni are generally satisfied with the current state of Wofford (Top 2 Box Score of 55%), they did convey specific areas of concern.

- **Our alumni are particularly concerned with the cost of tuition / financial aid and the degree to which Wofford is a good “value for the money”. Verbatim comments focusing on the cost of tuition were abundant, concerning and worth noting.**
  - *“I’ve tried to recommend the college to some young people and families but the cost floors them before they will begin to explore what Wofford has to offer. I know that there are so many opportunities for students but it seems to present as an exclusive club that if you don’t have a huge wallet you don’t need bother approach(ing) the door.”*
  - *“Cost. I did not recommend the college to my own sons for I could not afford to send them there.”*
- **They are discouraged by recent fundraising efforts:**
  - *“The fundraising effort, particularly for major gifts, has been abysmal over the last 7-8 years. Consequently, the endowment is woefully behind Wofford’s peer group. We need top leadership who is willing to tell the Wofford story among wealthy individuals, corporations and foundations with the result being 7-8 figure gifts to the college.”*
  - *“I never hear about any news or momentum in regards to fundraising for the college (as whole or on an athletic basis). Ultimately it appears as though Wofford’s administration is pretty hands off with fundraising which I believe is a weakness.”*
- **They are also much more likely than other stakeholders to be displeased with Wofford’s:**
  - Social Life / Greek Life
  - Intramural Sports
  - Methodist Affiliation

# Wofford's faculty and staff are generally quite satisfied with their "Wofford experience" ...

Satisfaction with Faculty/Staff Experience



✓ 87% would “highly recommend” Wofford to a colleague looking for a faculty/staff position

“It's a very small, very friendly liberal arts college with excellent study abroad and pre-medical preparation opportunities. The college has a beautiful campus, faculty focused on teaching and student interactions, a vibrant Greek system, and a strong professional development center.”

## ... but their morale may be in decline.



Despite generally positive quantified scores, verbatim comments reveal pockets of dissent / dissatisfaction among faculty and staff. Numerous faculty/staff mentioned that they feel that morale has decreased significantly in recent years.

### Alienation

*“Faculty morale has dropped significantly; faculty are suspicious of administration, and the administration seems too busy or too concerned with the Board to care.”*

### Priveleged/Traditional

*“... students who are not susceptible to change but stuck to tradition.”*

### Singularly. Less Collegial

*“My expectation of the support I receive from the administration is changing... Maybe it started with things like teaching awards—when we all feel like we are working as hard as we can and doing our best, what does it do for morale to single out a few each year?...When I came here, I felt the sense that we are all equal and all in this together. That camaraderie has been slowly eroding and I wish I understood better why.”*



Most importantly, the faculty and staff seem to be yearning for a strategic focus and a consistent, compelling brand position.

*“[If I could do one thing to improve Wofford], I would **develop and implement a strategic plan**...  
...We are enjoying where we are but don’t know how we got here. “*

*“**I honestly have no idea [what Wofford stands for]**. It seems like Wofford's image has changed several times in the few years I've worked here.”*

### Southern Traditional

“One of the factors for me was the ‘southern’ culture that existed at the time that I enrolled and continued until graduation. To an extent that same culture DOES NOT exist there as strongly as it did. Also, it was predominantly male during my time there, now the ratio has shifted to majority female.”

### For the Accomplished Scholar

“Wofford represents a class of both an intelligent and diverse student population. They are not only successful academically but also in athletics, the arts, and different cultures.”

### Heritage / Tradition

“Wofford should retain its Christian and family values.”  
“I would also hope that Wofford does not abandon its Methodist (Christian) heritage. Values-based inquiry is important, and I hope Wofford does not end that by seeking after ‘diversity’ and religious pluralism.”

### Progressive

vs.

“Four years at Wofford would be akin to jumping in a time machine and spending one's undergraduate years in the pre-Civil Rights-era South.”

### For the Privileged Few

vs.

“...Pre-professionals..., ‘good ole boys’ club, wealth, prestige, affluent economic status.”

### New / Modern

vs.

“I would hope that Wofford would stand as an example of shaking off the shackles of Trustees who treat the college like a kitchen garden in which to cultivate their nostalgia for their own college days in pre-segregation South Carolina.”

Verbatim comments suggest there are three critical elements that would vastly improve Wofford for the faculty and staff.



Strategy

Transparency

Communications

# 1 Leadership, a strategic plan, and clear vision of what Wofford represents.

*“We need to have the **leadership** to move in the direction that is best for the Wofford community... we are still trying to figure out who we are.”*

*“Wofford College **does not have a clear mission/vision statement and as such I struggle to think of what the college stands for.**”*

*“Wofford College does not currently have a strategic plan in place. I think that **careful and strategic planning is necessary for the college to advance.**”*

*“**We are heading into a transitional time with leadership,** and I am aware of how much President Dunlap's vision has gotten us where we are today. I worry that if we don't have a leader and a board of trustees who share this vision of the liberal arts and of what a great liberal arts institution can be, Wofford may fall back and become unremarkable, just a suitable place to educate promising young people in South Carolina and the surrounding region...**we need to be mindful, innovative, brave, and smart about how to move forward into the 21<sup>st</sup> century higher-education environment.**”*

*“**We don't know who we are, and we keep trying to be like other colleges.** We have to find what makes us special, develop that identity, and stick with it. Not this changing of self and brand every two years like we've had recently.”*

*“We don't know who we are, and we're looking to others to answer it for us. But we are unique and I'm very proud of that. So let's figure out how to articulate the wonderfulness that is Wofford.”*

*“Give us leadership and a vision we can believe in.”*



## 2

### More open communication and greater transparency.

*“**Better communication between administrators (including the board) and faculty/staff**, in both directions. This would include more transparency, more faculty governance.”*

*“I would increase the communication between departments, students and administration, faculty and administration, alumni and the college, the college and the greater Spartanburg community. **All of these groups don't communicate effectively.**”*

*“We need a better flow of communication among students, faculty, and the Board of Trustees. **I'd welcome the chance not just to share but also to learn...Good organizations feed-forward information and also cultivate feedback loops.** We try to do this with one another and with our students—would it not benefit us to do this at an institutional level?”*

*“I find out about major things after the fact. You have a new dean! Surprise! We're joining with VCOM and letting them use our campus, but we talked about that, right? More importantly, **the communication seems nearly all one direction—top down.**”*

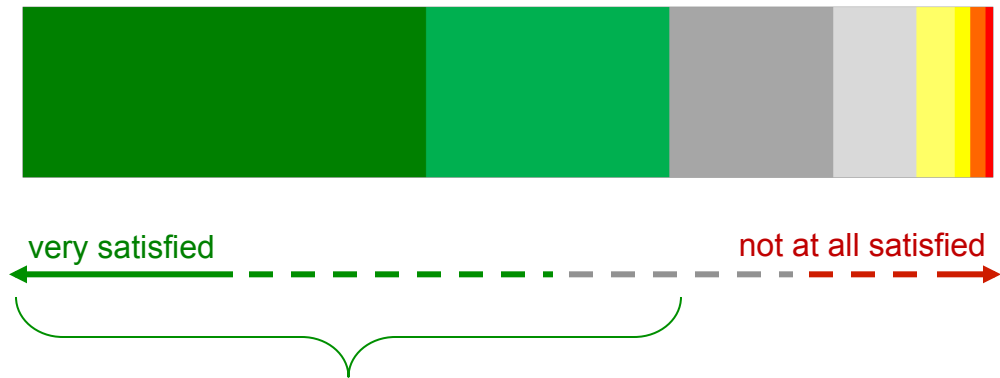
*“We need **more communication, more transparency and honesty.** We need to streamline the process so faculty don't get the same email multiple times...Right now, staff members don't have any like the information distribution that faculty do. I would love to see something for us, like a full staff meeting (even once a semester) or staff committees where we can be encouraged to get involved in the life of the College.”*

*“The tendency of the college is to do a lot of Big Important Hiring/Firing/Restructuring over the summer, and then lest us know in an email. This is not the way to communicate. **I always dread the summer months for that very reason: what will have happened behind closed doors?**”*

*“The **top-down, male-dominated hierarchy is a significant barrier now to innovation** and to the thriving of individuals' creativity and talent. This is exacerbated by a lack of transparency and communication from those at the top, so those in the middle and bottom who are ready and willing to innovate, to work, to create, cannot move forward...”*

# Wofford parents are among the most satisfied of all “internal” stakeholders.

Satisfaction with Parent Experience



68%

“The students at Wofford are like no other I have known. They are very supportive of each other and are very proud and happy to be there. It is a wonderful place to have your children go.”

But, like the faculty and staff, parents have concerns about both the Greek system and Wofford's lack of communication.

1

Parents expressed a concern about the social climate at Wofford and many associate the shortcomings with the Greek system.

*"Get rid of the Greek System. The exclusivity of the Greek System and the fact that most of the social life revolves around it is contrary to everything that Wofford as a college seems to be trying to achieve. It selects participants based on criteria that seems to be geographic and legacy driven rather than based on merit. It will be difficult to attract and retain top talented students from across the country and have their entire social life determined by this elitist and non-academic system... I will tell you that as a direct result of the Greek System, and lack of other social options, my daughter who is a [Name] Scholar seriously considered transferring after this year. "*

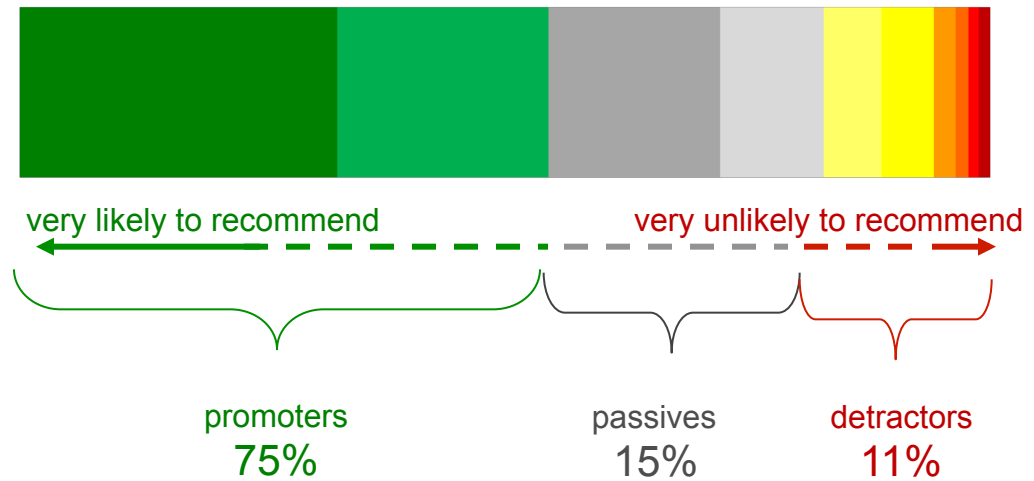
2

They want more open communication and greater transparency.

*"Improve communication about my own individual student and better communication with parents overall."*

*"I think there should be more interaction between teachers and parents. It is my perception that faculty members are not interested in meeting with parents. There are occasionally times that are offered for this, but they appear cursory in nature as they are usually held in conjunction with some other campus activity. When held under these circumstances, it doesn't take the precedence that is warranted."*

In sum, those who have experienced Wofford most deeply, have a great affinity for the college.



Wofford's Net Promoter Score

**64.0%**

And if we watch and listen closely to our stakeholders, they will almost always provide us with opportunities to improve.



Cost  
Financial Aid  
Communications  
Transparency  
Collaboration  
Vision  
Strategy  
Diversity  
Access to Leadership/Board  
Greek System  
Methodist Affiliation  
Alumni Involvement  
Fundraising  
Athletics  
Brand  
Awareness

But what the data clearly conveys, is that those “internal” stakeholders who have most deeply experienced the college, feel that Wofford is a very special, unique place



Parents

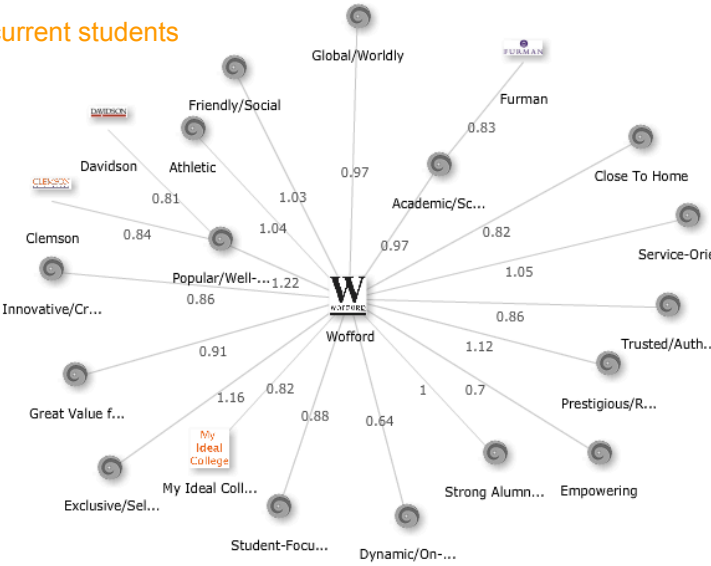
Faculty + Staff

Alumni

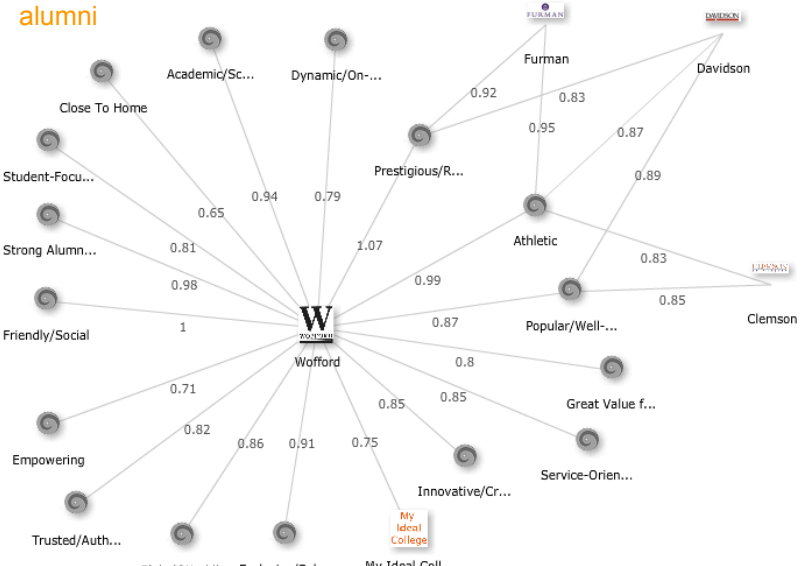
Current Students

# Almost literally without equal.

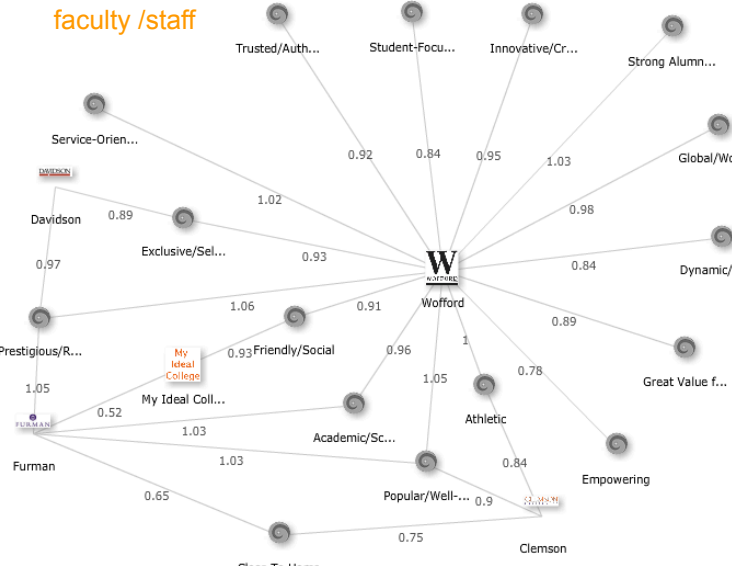
current students



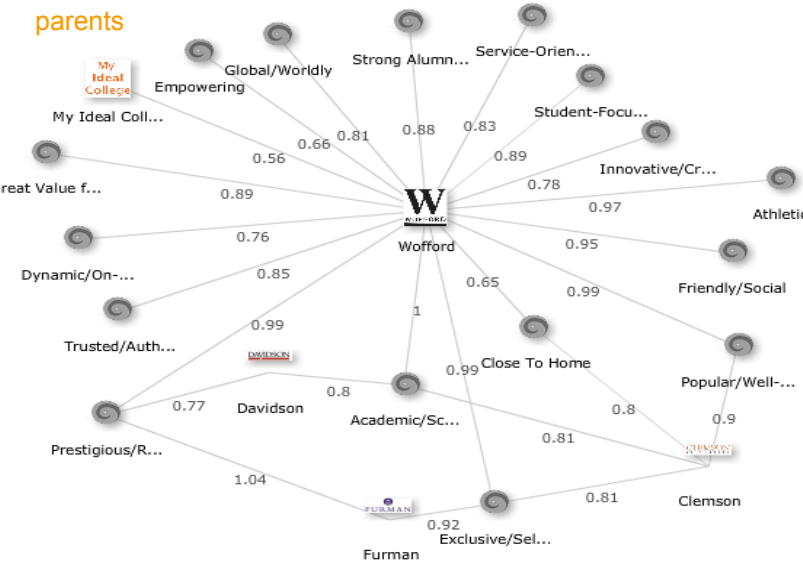
alumni



faculty /staff

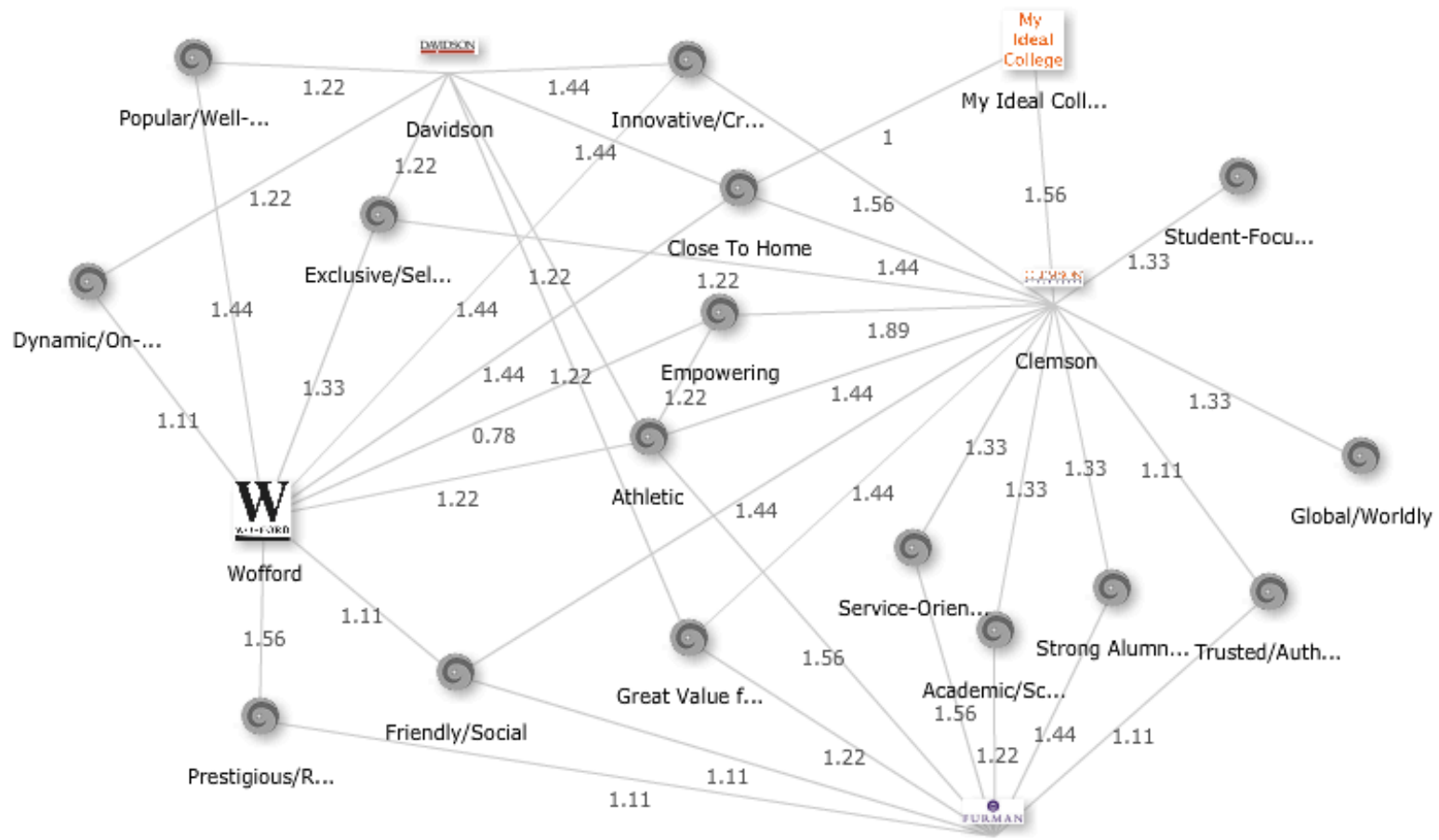


parents



However, findings suggest that the further one is from the “Wofford experience” the greater our competitive context, and the more tenuous our positioning.

## Trustees





So we must step back, see the “forest for the trees” and the least varnished truth from our most external stakeholder group.

## Prospective Students



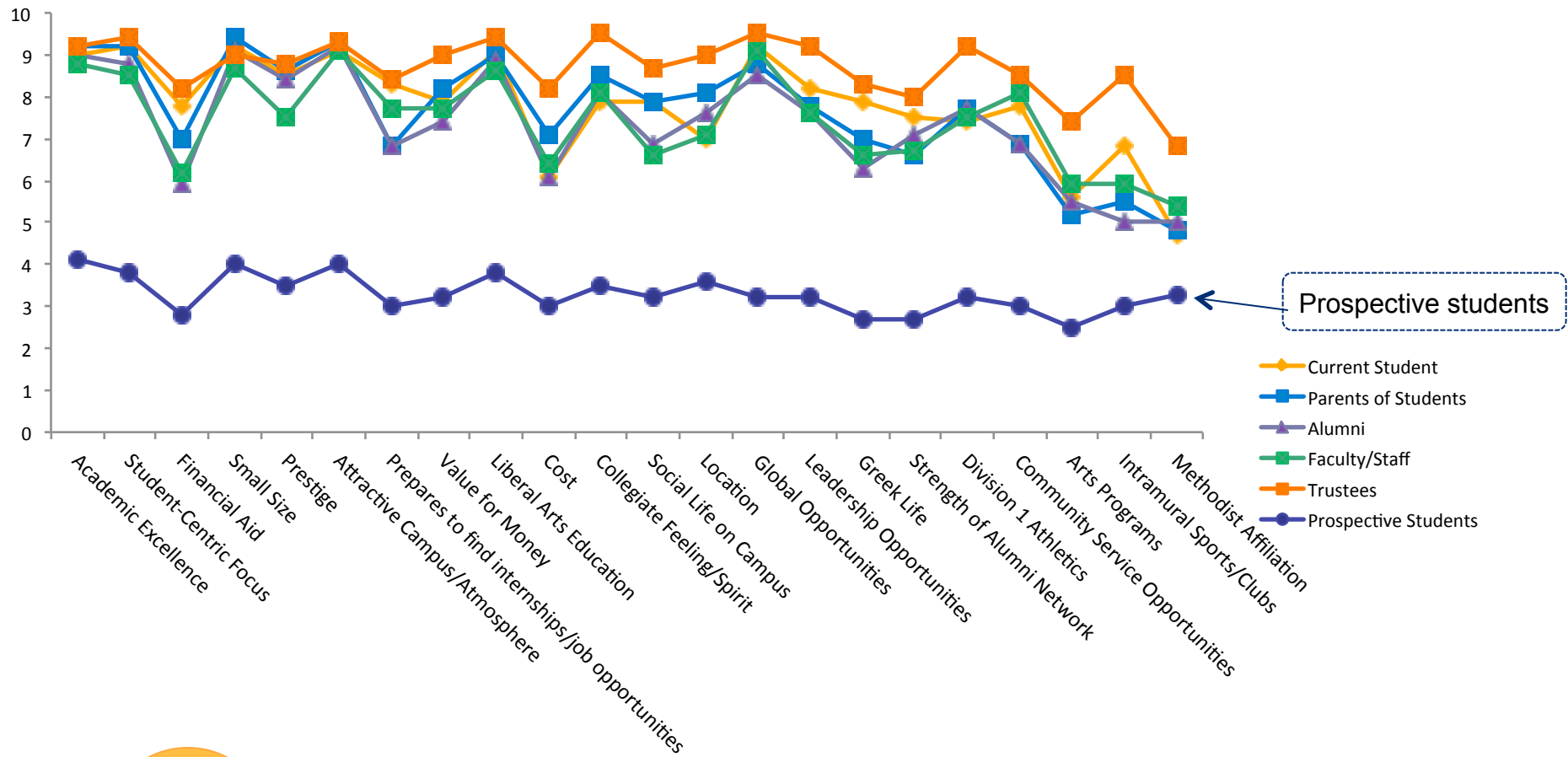
# Outside Looking In: Prospective Students On Wofford



## What can prospective students tell us about Wofford?

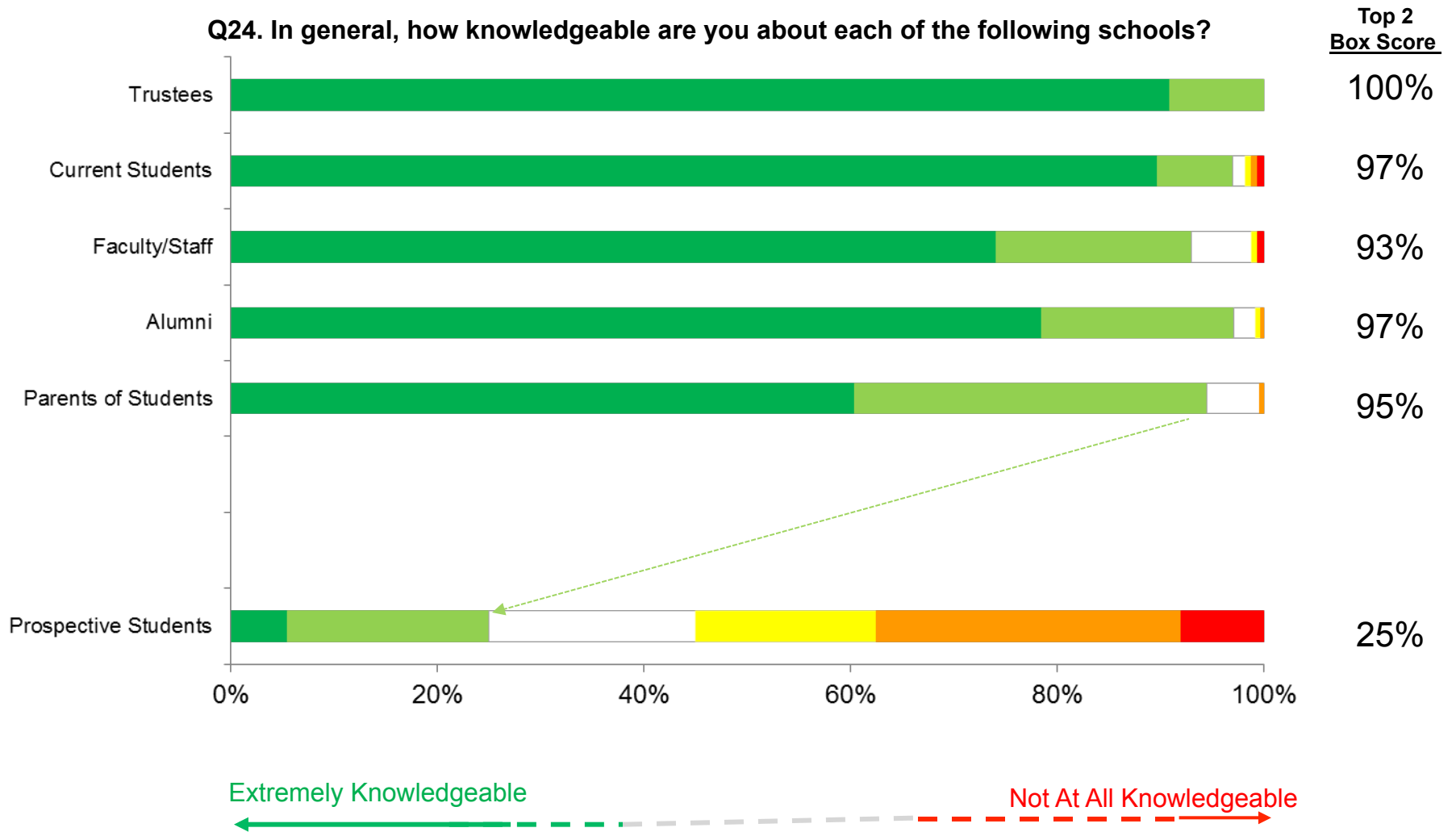


# Prospective students are dramatically less enthusiastic about every aspect of Wofford than “we” are.

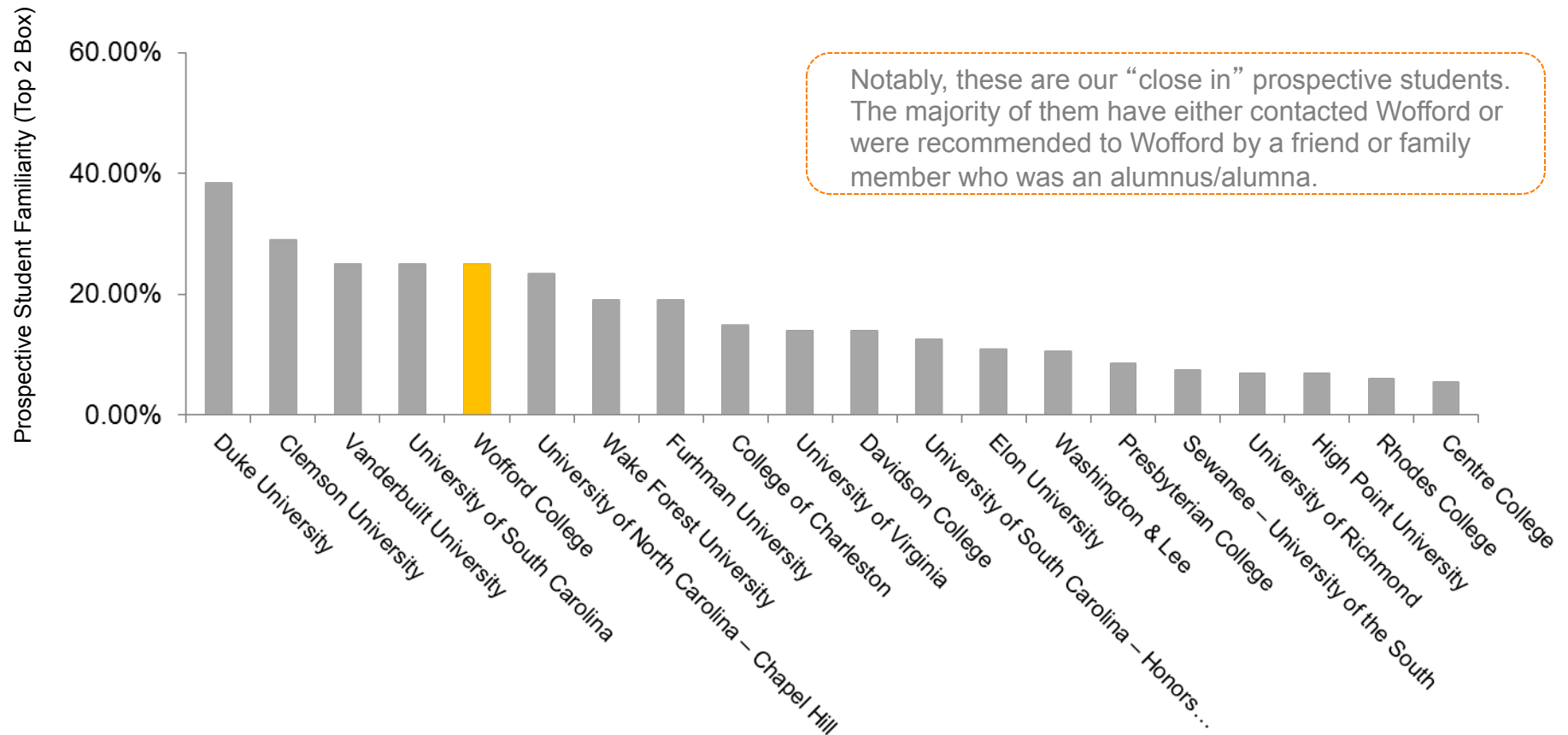


When asked how interested they were in attending each school, prospective students ranked **Wofford #9** (out of 22).

Certainly, some of these differences can be attributed to their lack of familiarity with Wofford.

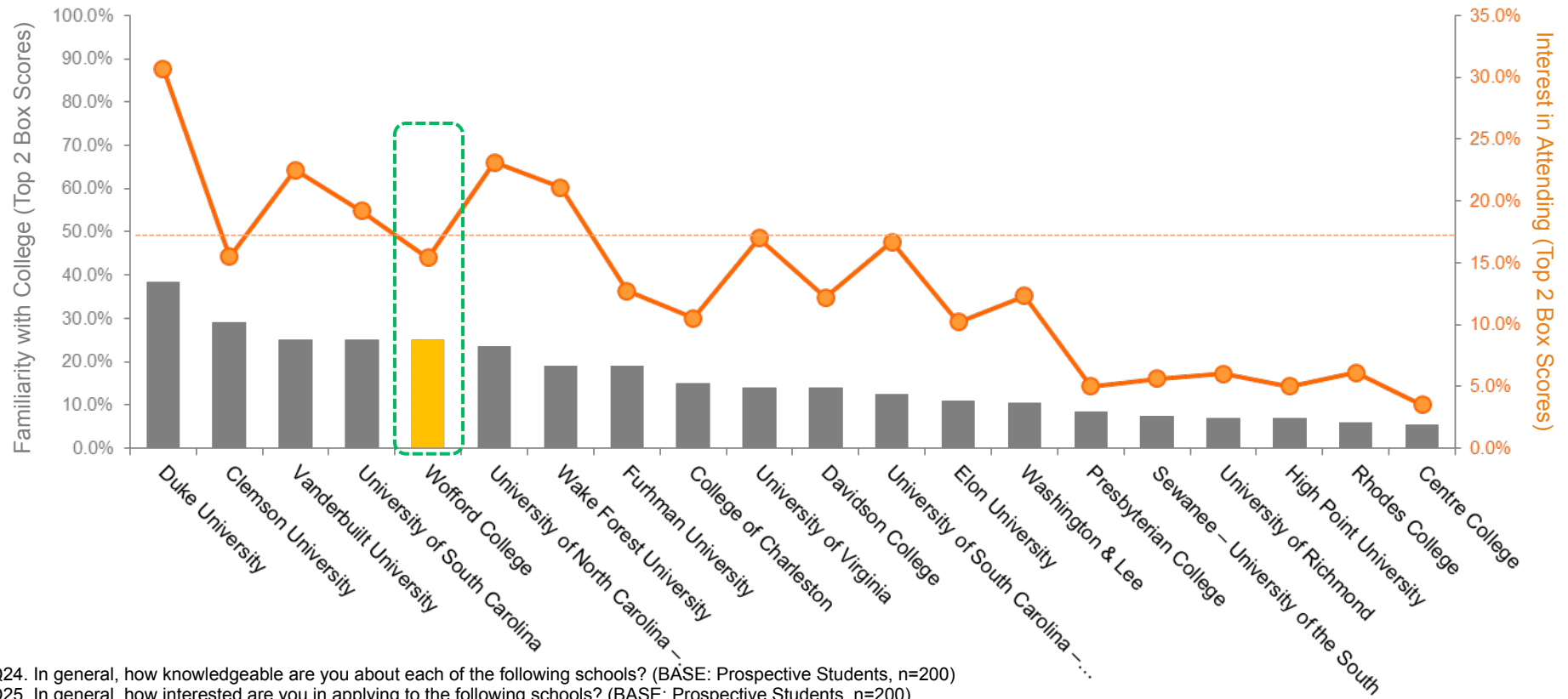


However, although this particular sample of prospective students was comparatively knowledgeable about Wofford...



...this elevated degree of knowledge did not necessarily translate into an increased interest in attending Wofford.

- Although students are less familiar with UNC, Wake Forest, UVA and USC, they are more interested in attending these schools than Wofford.
- Similarly, although they have a comparatively high awareness of Clemson, their interest in attending Clemson was on-par with Wofford



Q24. In general, how knowledgeable are you about each of the following schools? (BASE: Prospective Students, n=200)

Q25. In general, how interested are you in applying to the following schools? (BASE: Prospective Students, n=200)

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So, to understand their expectations and how they perceive Wofford we must dig deeper...







...and adjust our perspective to try to see Wofford from their point of view.

INSIGHT

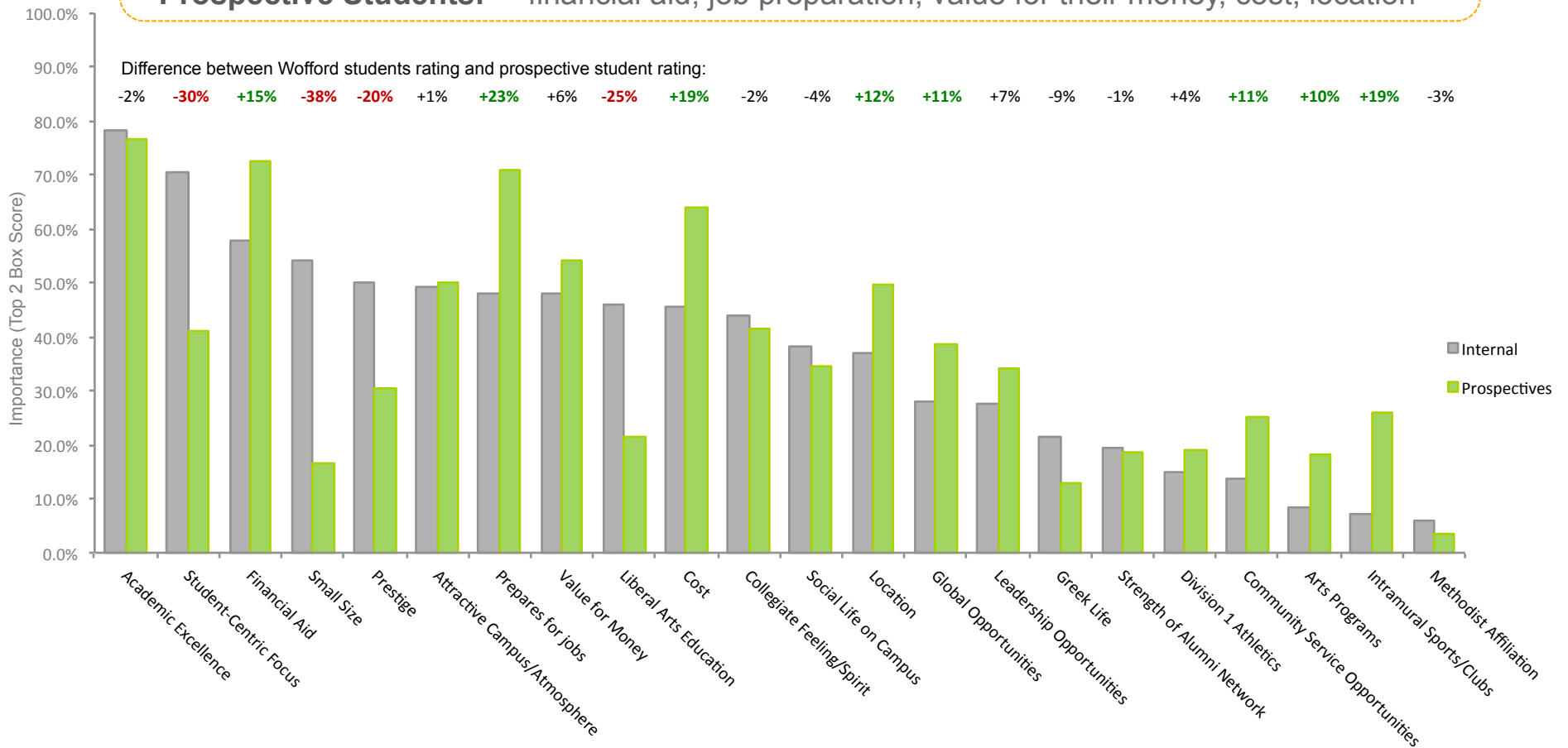
1

# Prospective students place value on different aspects of the college experience than “we” do.

As you evaluate potential colleges and universities, how important are the following attributes to you?

**Wofford Students:** student-centric focus, small size, prestige, liberal arts  
(past and present):

**Prospective Students:** financial aid, job preparation, value for their money, cost, location

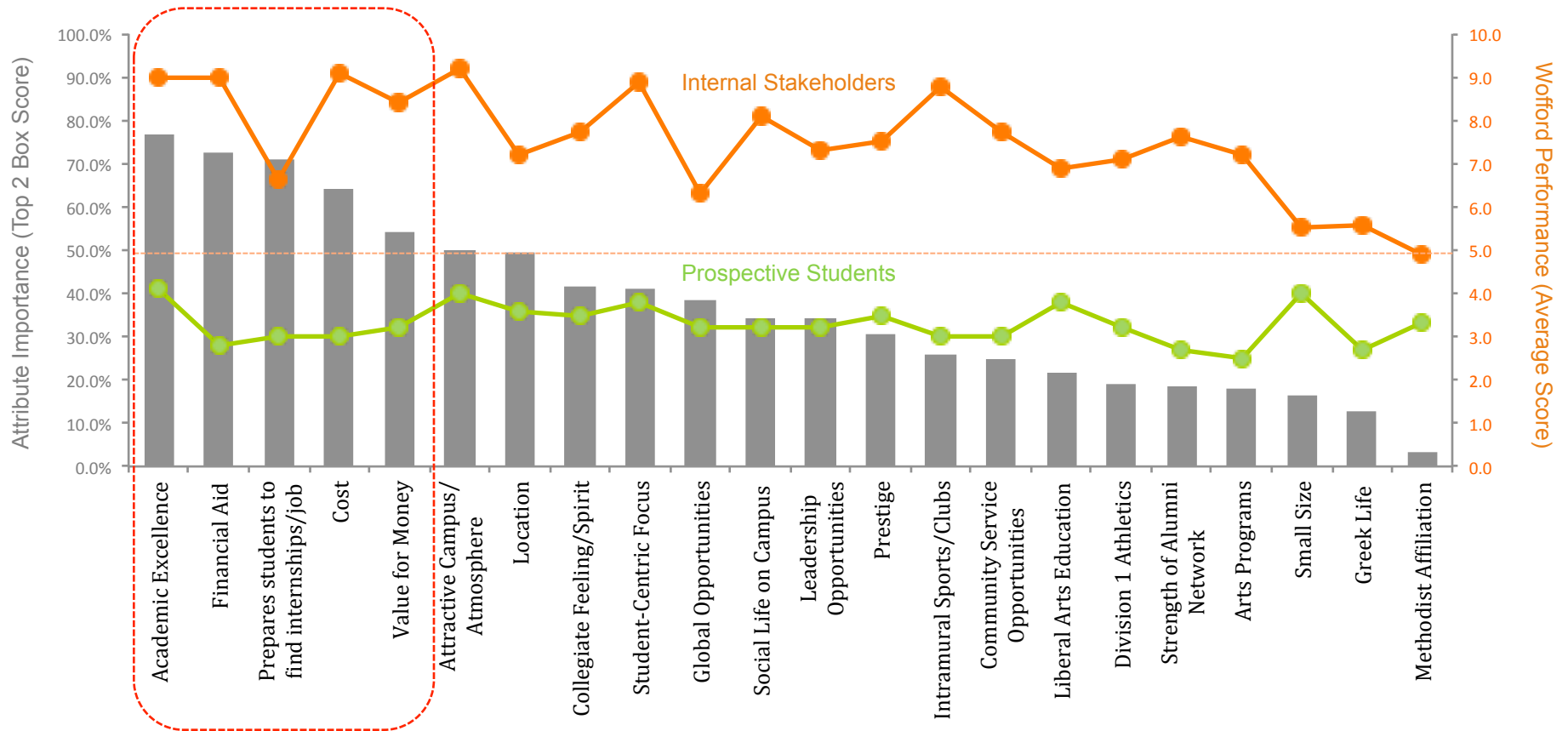


Q48. Thinking back to when you were deciding which undergraduate college/university to attend, how important were the following attributes to you? (BASE: Current Students & Alumni; n=939) Q46. As you evaluate potential colleges and universities, how important are the following attributes to you? (BASE: Prospective Students, n=200)

INSIGHT

2

From their perspective, Wofford under-performs on many of the factors that are “most important” to them.

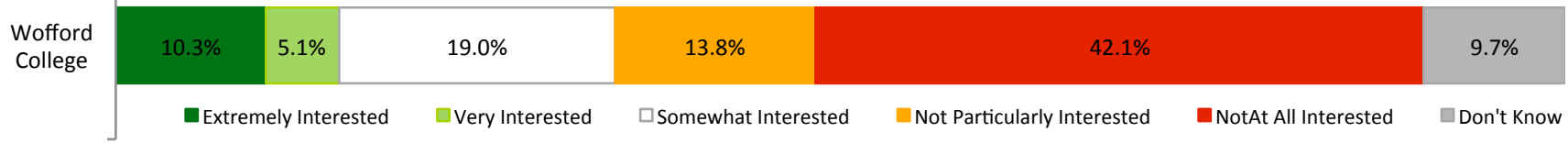


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 Q46. As you evaluate potential colleges and universities, how important are the following attributes to you? (BASE: Prospective Students, n=200)  
 Q51. How well do you feel Wofford College currently delivers across each of the following attributes? (BASE: All Internal Segments, n=1277)

INSIGHT

3

While some have already “opted in”...



15.4% →

of target prospective students believe that Wofford would be a good fit.

- *“I attended a visitation day there last spring and enjoyed it immensely. The college has a very welcoming atmosphere and programs that I am interested in.”*
- *“The environment was warm and inviting.”*
- *“The great academic reputation of the college.”*
- *“I also really like the four week semester that they use there where students are given the opportunity to try something new, such a study abroad for that time period.”*
- *“I like the small campus, the small class size..”*
- *“It is a small school that seems to have a great atmosphere of community and diversity. This school has a strong academic reputation and is close to my home.”*
- *“I have a relative that attended Wofford. He described it as an excellent college with a fun, but very rigorous education. He still attends there, and is very happy with his professors and peers. He is doing very well there. This caused me to be interested, as I am looking for a college that is both interesting and challenging.”*

## INSIGHT

3

and others aren't a great fit.....

Wofford  
College



For some percentage of students, Wofford will never be a good fit.

**X** They don't want small:

- "Too small for me, I'd like a school with around 10,000 people."
- "I am looking for a larger campus, Wofford is in a nice town, but I was wanting about 6500 to 7000 student population."

**X** They don't want to be in South Carolina:

- "I am not interested in going anywhere south of Pennsylvania (my state.)"
- "It is too close to where I currently live."
- "The location of Wofford College is not the setting for my ideal college experience."

**X** They do not want to go to a Liberal Arts college:

- "I am interested in sciences, particularly in engineering. I see Wofford as a liberal arts college."
- "Not much in hands on engineering and robotics"
- "This school does not focus/offer majors in the areas of my interest. I am interested in computer engineering, and would like to direct my studies to that, not just a general major in Computer Science."

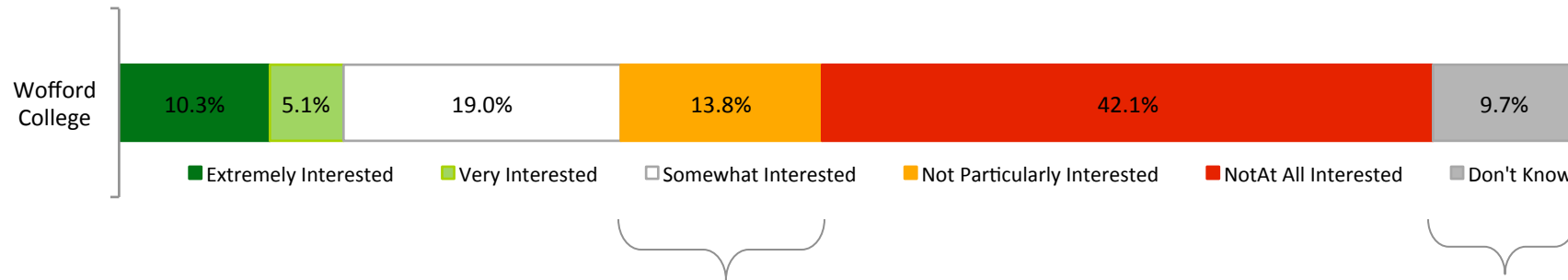
**X** They aren't interested in a Methodist education

- "I intend to go to a Catholic college."
- "I'm Jewish, so I don't want to go to a Methodist school."

INSIGHT

3

...there may be a sizable population of prospective students who have prematurely rejected Wofford.



However, there remains a percentage of students who are “unsure” or who mistakenly think that Wofford is not a good fit who might also be “swayed”.

To do so, Wofford would need to—

- Build awareness and familiarity with more strategic and impactful marketing and communications efforts.
- Leverage targeted marketing to reinforce those messages that resonate with them.
- Set a new strategic direction for Wofford that is informed by stakeholder input.

How do we sway prospective students in our favor?

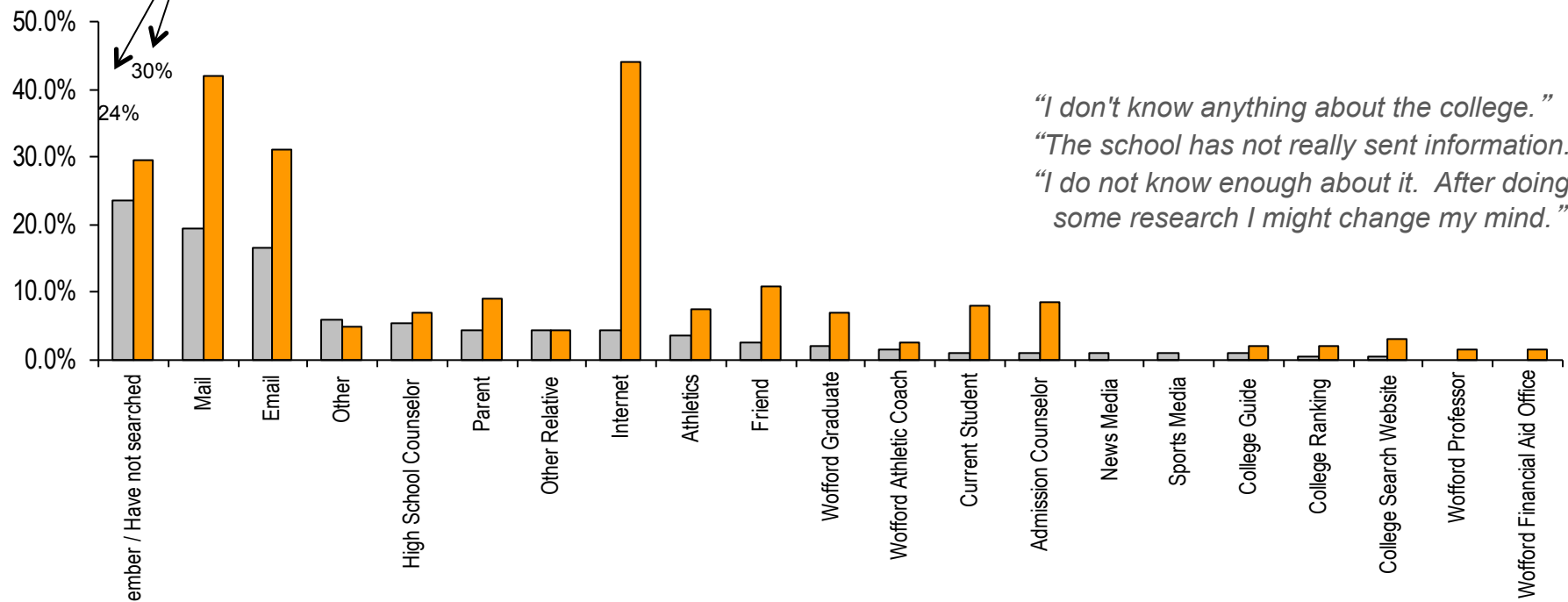


# 1. We must enhance our marketing efforts and craft strategies for capitalizing on those sources and resources that they find useful.

- 24% of prospective students said they don't remember how they first heard of Wofford
- 30% said they have done no additional research into the college



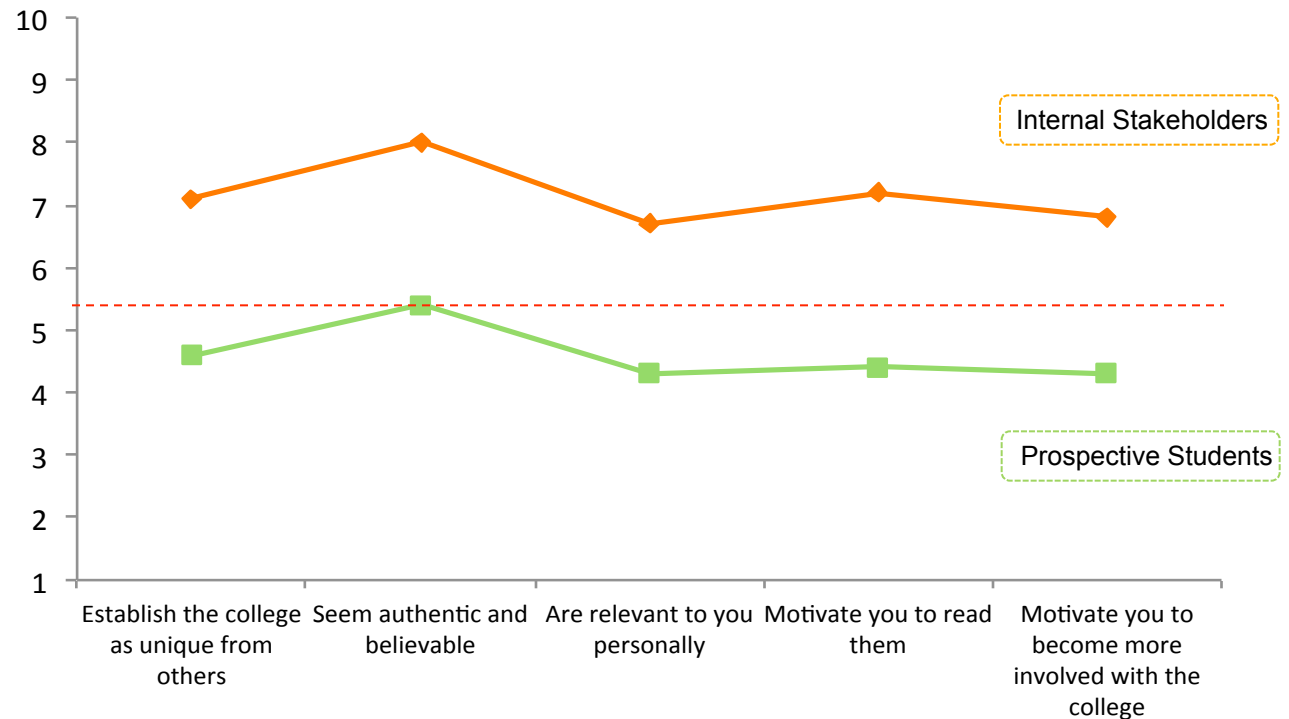
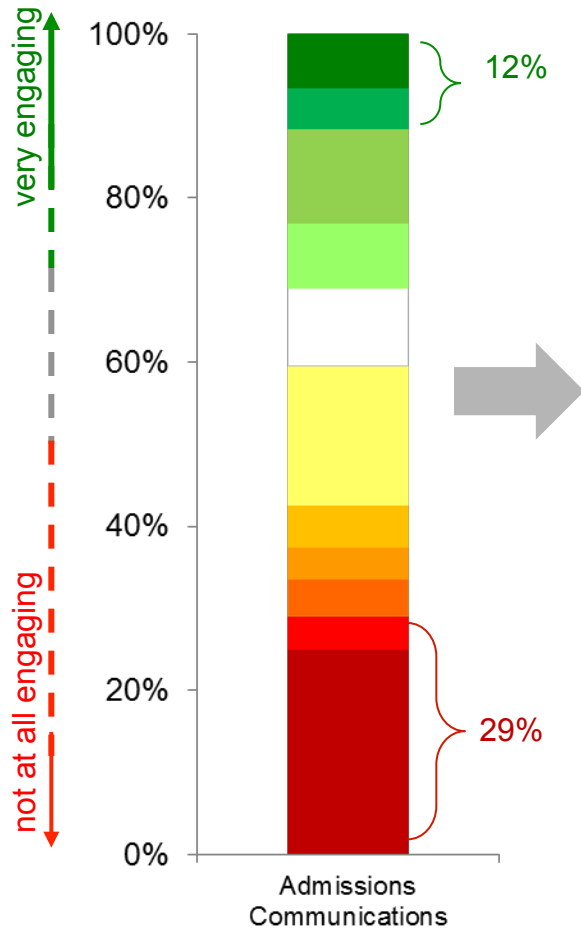
Admissions communications efforts need to inspire greater curiosity about Wofford.



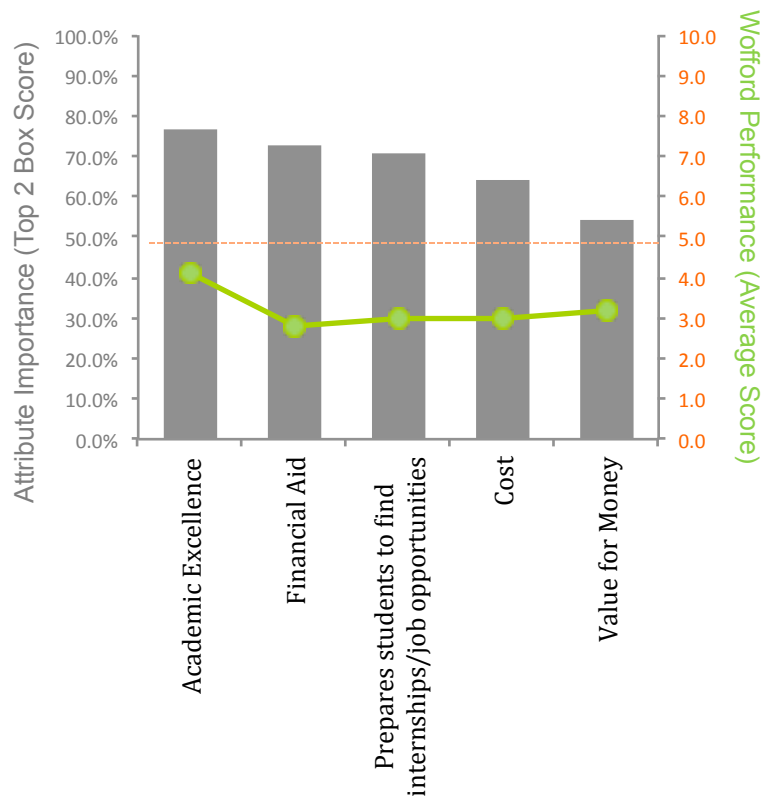


# 1. We must enhance our marketing efforts and craft strategies for capitalizing on those sources and resources that they find useful. *(continued)*

- Fewer than 12% of prospective students found Wofford’s admissions communications efforts “engaging”
- Although they find Wofford’s communications efforts to be relatively “authentic” and “believable”, they rate them below average on all other metrics.



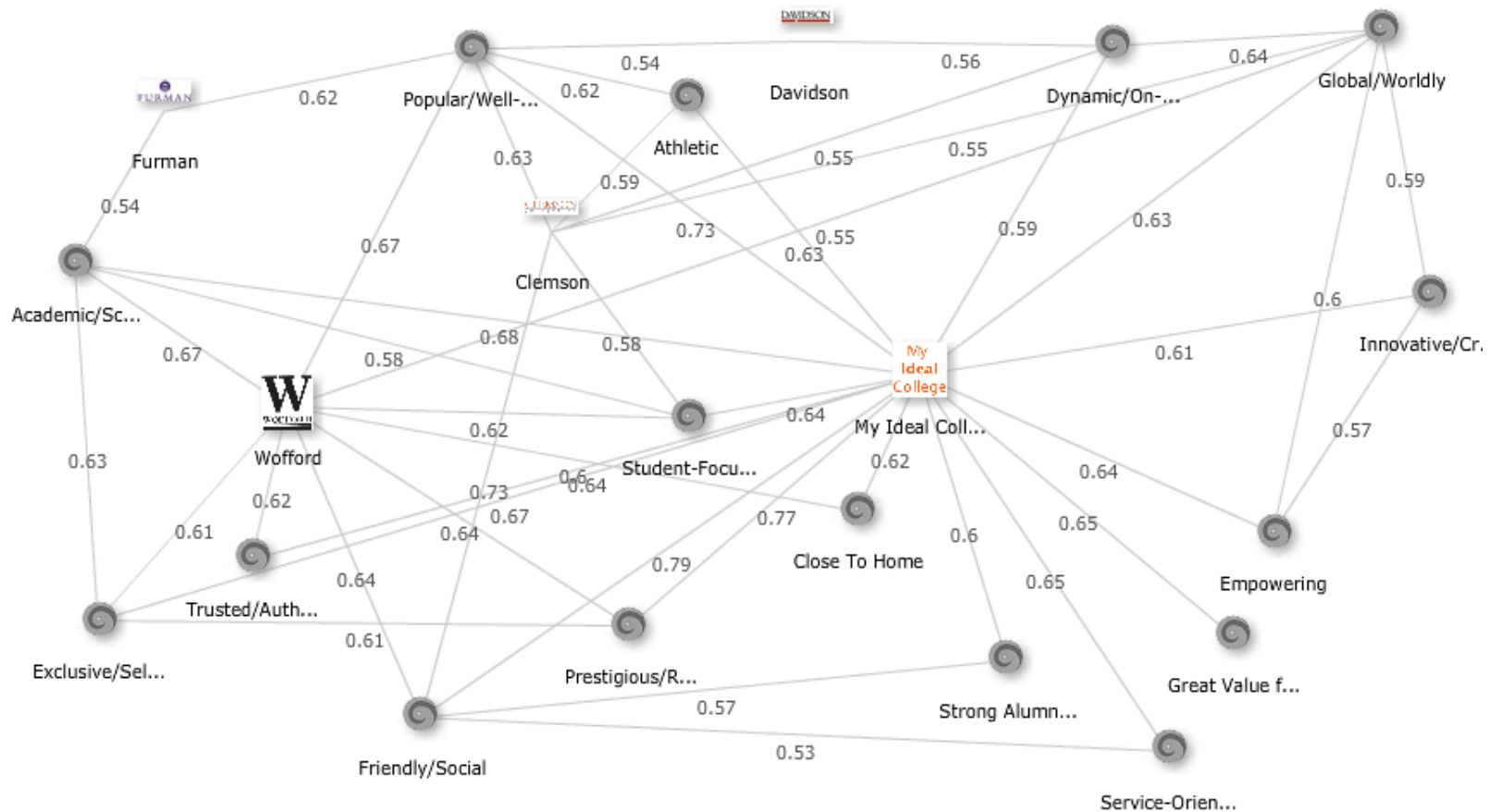
## 2. We need to reposition Wofford and leverage targeted messaging to reinforce both Wofford’s meaning and its commitment to things that are most important to prospective students.



- Academic Excellence is the most important attribute to both Wofford students (past and present) and prospective students. However, prospective students are less convinced that Wofford is academically rigorous.
  - What can we do to reinforce / demonstrate our high academic standards?
- Prospective students are very concerned about “Financial Aid” and “Cost”. While adjusting either of these metrics may be difficult in the short- to medium-term, we could leverage our communications to better reinforce “Value for Money”
  - What makes a Wofford education superior? Why is it worth the investment? Why is Wofford a better investment than those in our competitive set?
- Prospective students want to know how Wofford will prepare them to find a job.
  - How do we show that this is not only a priority for Wofford but a competency that sets it apart from our peer institutions?

2. We must reposition Wofford and leverage targeted messaging to reinforce both Wofford's meaning and its commitment to things that are most important to prospective students. *(continued)*

### Prospective Students





### 3. We must craft a strategic plan and vision for Wofford that authentically builds upon our past successes, sets us apart, and focuses the next phase of our evolution.



Faculty and staff expressed a desire for strategic plan and vision for the college that informs what the college “stands for”—today and tomorrow.

Competitive and financial realities suggest that Wofford must be razor focused in its future endeavors.

The “Wofford experience” is meaningful to those who have lived it. How do we leverage it as a competitive advantage and platform for change?



Our stakeholders suggest that there are short-term and long-term considerations that should fuel the creation of Wofford’s strategic plan and the articulation of its vision.

## 9 Short-Term Considerations

1. How do we aggressively and authentically increase Wofford's public profile?
2. How do we more fully leverage athletics to the benefit of all of our stakeholders?
3. How must Wofford evolve to better address the challenges and opportunities surrounding diversity?
4. How can Wofford adopt an approach to its fees and/or financial aid in a way that entices promising applicants and sets it apart from the competition?
5. How can Wofford better prepare its students for job and internship opportunities—and leverage its reputation and competency for doing so both inside and beyond Wofford?
6. How can Wofford proactively engage and involve its alumni (near and far) and transform it into a unique source of competitive advantage?
7. What is the ideal role for Greek life at Wofford and how can it fuel success?
8. How can we lead Wofford via greater transparency and collaboration?
9. How can Wofford adopt a more centralized, strategic, holistic, and rigorous approach to marketing?

## 9 Long-Term Considerations

1. What role will Wofford play in the evolving landscape of higher education?
2. How will Wofford establish value amidst a growing popular sentiment that questions the value of a college education—particularly when provided by a private institution with a Liberal Arts curriculum?
3. How must Wofford strategically reposition itself and its “brand” to both differentiate Wofford from the competition and fuel success?
4. What can Wofford do to expand its reach and influence beyond the Southeast?
5. What is the role of the Methodist Church within Wofford (philosophically and in the day-to-day)?
6. What role should the arts play in helping Wofford progress toward achieving its strategic vision?
7. How should Wofford balance its conservative, Southern heritage with the progressive inclinations of some of its current and future stakeholders?
8. What key metrics must we put in place to measure Wofford’s future performance and progress toward realizing its strategic vision?
9. How can Wofford institutionalize stakeholder understanding (internal and external) to guide its future decisions and actions?

## 9 “Silver Bullet” Recommendations

1. Draft a plan Craft a revolutionary vision and strategic plan for Wofford by enlisting the help of your stakeholders and make the process as transparent and collaborative as possible.
2. Open Up Provide faculty/staff with greater access to decision-makers and the Board of Trustees.
3. Strengthen marketing Align all stakeholder-facing communications and outreach efforts. Institute formal marketing planning processes. Centralize all marketing decisions at the highest level of the organization.
4. Benchmark Leverage the data accumulated via this initiative as a “benchmark” by which future progress is measured. Update future waves of research questions pertaining to goals outlined in the vision, strategic plan, and marketing plan.
5. Make Jobs, Job 1 Educate faculty/alumni about the career development process and make it a unique competency.
6. Make the “Wofford experience” portable Arm alumni with discussion questions for book groups. Sponsor faculty to provide lectures to groups of alumni and their contacts. Ensure social media efforts are aligned with the “Wofford experience”.
7. Reposition Wofford Leverage findings to determine the most promising means of repositioning Wofford. Align with the college’s vision and strategic plan. Craft promising positioning concepts for Wofford. Determine which best resonates with key stakeholders. Ensure Wofford stakeholder-facing actions support the college’s new positioning.
8. Open up and listen up The greatest compliment we can pay our stakeholders is to listen to their unmet needs and advice. Share some of these research findings widely among your stakeholders. Consider building a community of “stakeholder advisors” (e.g. students, alumni, faculty, etc.).
9. Deal with Price Address the cost barrier in a uniquely Wofford way that reinforces your vision, strategic plan and positioning—and both activate and announce the solution as the first manifestation of these new strategic perspectives.



Thank You.



# Appendix H



# WOFFORD

Could you spend your next four years on a beautiful, historic campus at a prestigious liberal arts college with a national reputation for combining challenging academics, hands-on experiences, world-class faculty, Div. 1 athletics, and top-ranked study abroad participation within a uniquely relaxed, passionately energetic and community-centered culture?

Not unless you apply.

That's why we're sending you this "little" note to remind you that Wofford's application deadline is approaching quickly. We don't want to miss our chance to help you become part of our community.

**Nov. 1** is the deadline for our binding early decision, **Nov. 15** for non-binding early action, and **Feb. 1** for regular decision (more info at [wofford.edu/apply](http://wofford.edu/apply)).

You can apply to Wofford online through the Common Application at [commonapp.org](http://commonapp.org). If you have any questions about your application, call us at 864-597-4130. We look forward to hearing from you.

[www.wofford.edu](http://www.wofford.edu)