ABSTRACT

REFLECTIONS ON USING MY MTSC PROGRAM AND INTERNSHIP EXPERIENCES WITH ONLINE MARKETING/BRANDING TO BUILD ORGANIZATIONAL SUSTAINABILITY FOR OHIO’S E & A CENTER

by Emily E. Ryan

Most professionals working within a non-profit organization, whether subconsciously or purposefully, are continuously thinking of ways they can contribute to the “health” of their organizations. Often, these thoughts are focused on communicating the organization’s mission and work to others, while also thinking strategically about the future. This report describes the use of an open-systems business approach, including the practice of environmental scanning as methods for successful non-profit management and sustainment. It chronicles my experiences while interning with Ohio’s Evaluation & Assessment Center during Summer 2012, and explains how I was able to mingle my MTSC coursework with my responsibilities as an E & A Center employee over the course of my time in the MTSC Program. Throughout the report, I provide evidence of my growth as a non-profit and technical communications professional, as well as the ways in which my MTSC work has benefited the E & A Center.
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Executive Summary

This internship report describes the work I completed as part of my MTSC Program and internship experiences between 2009 and 2012. This summary, in particular, discusses findings and implications from my work on several non-profit, client-based projects with the Learning Tree Farm (LTF) and Ohio’s Evaluation & Assessment Center (E & A Center). Based on my experiences working with these clients, I provide general recommendations for improvements to similarly-based work.

My work for the LTF and Ohio’s E & A Center chiefly involved conducting research and providing information that could contribute to the “health,” stability, and sustainability of each organization. For the LTF, I applied my knowledge of grant writing and funding databases (e.g., Pivot.com and Foundation Center Directory) to provide funding opportunity information that they could use to help support their outdoor educational programs. For the E & A Center, I researched National Science Foundation funding information, as well as applied my knowledge of organizational/business communications concepts (e.g., open-systems business approach, environmental scanning) in order to provide informed recommendations for expanding and enhancing their marketing/branding practices. In general, the methods I used to complete work for the LTF and E & A Center were successful. That is, the information I provided to them was, and continues to be, beneficial to their strategies for maintaining organizational “health” and stability. The exact impact, however, of my work on each organization’s ongoing sustainability efforts was unclear. This latter outcome was the result of two issues that occurred during my work, both which affected the LTF and the E & A Center’s abilities in using the information I provided to them. The first issue included several unpredictable environmental factors (e.g., social, political, financial) which influenced each organization’s internal network/system; and, the second was a misalignment between my recommendations for gaining new funding or new clients/work, with that of each organization’s capabilities for completing such work. While my technical communications knowledge contributed to my ability to complete non-profit, client-based work for the LTF and E & A Center, this type of work is only effective if it is aligned both with the specific needs, as well as the capabilities of the organizations involved. Specifically in relation to strategies for non-profit organizational stability and sustainability, this means providing informed, yet cost- and resource-effective information which these types of organizations can use to complete, manage, communicate, and promote their work.
Introduction

As a professional working in a non-profit environment for many years, I have learned that an organization’s efforts in gaining new funding and clients are typically unsuccessful about 70% of the time. This success/failure rate can be attributed to a number of factors (e.g., a non-profit organization’s skill-set; their experience within their field; competition within the organization’s field; and, social and political environmental factors surrounding the organization). Dealing with a 30% success rate can often times cause feelings of rejection or failure; however, it is the organization and its member’s ability to forge ahead professionally and productively toward new opportunities that ultimately allows them to succeed in their work.

For a non-profit organization to survive or thrive, there are several ways it can combat funding failure rates, pressures from competitors, and impending environmental changes. One way is to invest in the organization’s resources and knowledge-base. These efforts help the organization to work efficiently, and to provide clients with accurate and quality products. A second way is to stay abreast of surrounding environmental changes that could either positively or negatively affect the organization’s overall “health.” This effort allows an organization to respond or adjust appropriately to factors that might upset the flow and function of their internal network. Yet, a third way, is to ensure the reach and richness of the organization’s mission and work through meaningful communications with current/potential clients, as well as through strategic marketing and branding efforts. When put into practice, all of the above mentioned efforts can help to contribute to the “health” and sustainability of an organization.

In the following report, I discuss my efforts over the past half-decade in combining my work as a MTSC student with my responsibilities as an employee with Ohio’s Evaluation & Assessment Center. I explain how through the work of several of my MTSC course projects, I was able to evolve my own professional skill-set, as well as contribute to several of the E & A Center’s processes for completing, promoting, and sustaining their work.
As a requirement for obtaining a Master’s in Technical and Scientific Communication at Miami University, I completed an internship with Ohio’s Evaluation and Assessment Center (E & A Center) during the summer of 2012. This report offers an overview of my internship experiences, beginning with Chapter 1, which provides information about the E & A Center, including a description of its mission, services, and the financial framework and organizational structure in place during my time as an intern.

In general, the work I completed while interning falls into four main categories: Research, Networking/Marketing, Writing, and Editing. Under each work category, the genres of formal and informal projects or products I completed included presentations, research reports, grant funding opportunity spreadsheets, executive summaries, and essays. Figure 1 shows the average percentage of time I spent on project activities by work category.

![Average Time Commitment by Work Category](image)

**Figure 1.** Average percentage of time commitment to project activities by work category.

As shown in Figure 1, the majority of my internship work falls into the Research category (50%), while all other activities related to Networking/Marketing (30%), Writing (10%), and Editing (10%),
respectively. I also pursued several professional development (PD) activities during my internship. Key projects and products from my internship, as well as knowledge and skills gained from my internship and PD experiences are discussed in greater depth throughout the remainder of this report. That is, in Chapter 2 of the report, I offer descriptions of three key projects I completed while interning with the Center, and one professional development activity: 1) a National Science Foundation (NSF) ADVANCE Program Research Report, 2) a Grant Funding Opportunity Spreadsheet for the Learning Tree Farm (LTF), 3) a Digital Branding Client Project for Ohio’s E & A Center; and 4) a Grant Professionals Foundation Scholarship Essay. Also in Chapter 2, I highlight how each project or activity contributed to the E & A Center’s ability to better serve current clients; gain new clients and new funding; extend the reach of the Center’s current brand; and enhance current employees’ skill-sets.

Chapter 3 focuses on the Digital Branding Client Project, specifically, explaining how this project was developed, describing several outcomes of the project, and providing examples of final project deliverables. In the fourth and final chapter of the report, I examine and critique my strategies for completing the Digital Branding Client Project; look ahead to the possible challenges of fulfilling and sustaining certain outcomes of the project; and conclude the report with a discussion of the implications that the project had on my own skills as well as on the Center.

**Overview of E & A Center’s Mission, Services, and Organizational Structure**

Below is a brief historical overview of Ohio’s Evaluation & Assessment Center (E & A Center), including a description of its current mission, the types of clients it serves, and the types of services it provides. Also discussed is the financial/organizational framework within the Center, the organizational environment surrounding the Center, both within and outside Miami University, and the organizational culture (e.g., management, leadership, employee expectations) at the Center during the time of my internship.

**E & A Center’s Inception and its Mission**

When the E & A Center was established in 2003, the original founder’s vision was to create a Center that could provide reliable and valid information concerning the outcomes of project or program efforts within the fields of mathematics and science education. The Center was meant to exist as a self-
sustaining entity with the capacity to primarily serve the evaluation, assessment, and research needs of individuals and groups within the state of Ohio (e.g., state agencies, mathematics and science education groups, institutions of higher education, local school districts, mathematics and science educators and leaders, etc.). Since 2003, the Center has thrived by serving not only the evaluation and assessment needs of others locally, but also those nationally, through start-up funds from the Ohio Board of Regents (OBR) and various other state- and federal-grants.

The Center’s mission has remained mostly the same over the last decade; however, a formal mission statement was not officially coined until 2012, and is likely to be revised in the near future as the E & A Center plans to merge with an affiliate Center, the Discovery Center. At the time of my internship, the Center’s mission was: To improve K-20 STEM education, and beyond, in Ohio and across the nation by collaborating with local, state, and national agencies, school districts, higher education institutions, professional development centers, and mathematics and science education groups to provide specialized evaluation, assessment, and research services which support the delivery of reliable and accurate information about the outcomes of academic program efforts, activities, and initiatives.

E & A Center’s Client-Base & Services

Since its inception, the E & A Center has primarily provided evaluation and assessment planning and execution for individuals and groups involved in science, technology, engineering, and mathematics (STEM) education related programs and projects. Over the last few years, the Center's services have expanded to include work in other fields such as communications, business, and non-academic barriers to students’ educational achievement.

The Center’s major client-base consists of faculty and staff from institutions of higher education across Ohio and the nation, as well as other stakeholders from state and federal organizations or groups. Examples of institutions and stakeholders for whom the E & A Center has provided services include: Miami University (Oxford), The Ohio State University, Michigan State University, Purdue University, University of Cincinnati, University of Buffalo, University of Pennsylvania, The Ohio Department of Education (ODE), and The Ohio Board of Regents (OBOR). Examples of projects, which the Center has played a key role in evaluating, include: The Ohio Mathematics and Science Partnership Project (OMSP) and Ohio Resident Educator (RE) Program; National Science
Foundation (NSF) ADVANCE Institutional Transformation projects; and Ohio Board of Regent Improving Teacher Quality (ITQ) Professional Development projects. For example, the Center recently provided a broad evaluation of the progress and impact of two of Ohio’s educational programs (i.e., OMSP, REP). That is, the Center monitored and assessed several projects involved in each program and reported findings to key state stakeholders for the purpose of process and program improvement.

Clients who typically contact and work with the Center request assistance related to either pre- or post-grant proposal award services. Such services include proposal development, compilation, and attainment; research or evaluation design; instrument development and modification; budget development and design; and evaluation and assessment in the form of data collection, analyses, and reporting.

Financial Framework

Financially, Ohio’s Evaluation & Assessment Center has been, and continues to be self-sustaining; this is, it functions almost exclusively on soft monies from state- and federally-funded grants. Grant monies are usually either acquired directly from grant proposals written by the Center, in which the Center leads activities for their own projects; or monies that are acquired indirectly, through sub-contracts with other individuals who are submitting proposals for a grant award and who may require some type of post-award external service for their projects.

Pre-award services for clients do not always result in immediate financial compensation for the Center, because the Center is not paid for services prior to the award of a state- or federal-grant for any given project. In this sense, the Center maintains a delicate balance between the pre- and post-award services provided to clients. It should be noted, though, that efforts from Center staff in establishing relationships with clients during pre-award processes typically result in post-award work. This occurs because, often times, the Center is then asked by such clients to serve as either a paid evaluator or consultant for their projects if/when they are awarded.
Grants or projects that the Center becomes involved with are almost always led by a principal investigator (PI), (i.e., lead researcher). PIs typically contract with the Center for whatever services they need, and as mentioned previously, the majority of these involve post-award (i.e., evaluation and assessment) work. One of the major reasons why the Center exists as primarily a provider of evaluation and assessment services is because of state (e.g., ODE) and federal (e.g., NSF) project reporting regulations for education-related grants. That is, project PI’s are required not only to track, but also to report on the progress of their projects (a.k.a., report on progress toward project goals via data collection and findings). As an evaluator, whether internal or external, the E & A Center can act as an unbiased source for collecting and reporting data and information about a project. As an internal evaluator, the Center typically contributes to a project PI’s self-monitoring activities related to formative project improvement; while, as an external evaluator, the Center collects and analyzes data for a project’s funding agency or stakeholder which is then reported through the PI.

**Geographic Location**

Geographically, the E & A Center is located within Miami University’s College of Education, Health and Society in Oxford, Ohio. Though it is self-sustaining, the E & A Center still functions as a part of a larger network of local and national organizations, institutions, and individuals both within and outside of Miami University, all of whom influence the Center’s livelihood to some degree. This network includes local and national competitors, clients, partners, stakeholders and administrators; state and federal funding agencies; and state and federal legislatures/policy-makers.

Due to the Center's geographic positioning and grant-funded status, changes, which occur at the local-, state-, and federal-levels, typically trickle down to affect the Center in some way. For example, several major changes in the last half-decade have significantly affected the E & A Center's livelihood and the way their organization functions. For example, shifts or decreases in Miami University’s Departmental structures, staffing, and funds (e.g., budgetary and hiring freezes) have occurred affecting not only the administrative policies that the Center has to follow, but also one key item such as the fiscal indirect rate\(^1\) which the Center has to provide to the University from any external monies

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\(^1\) The Center’s indirect rate is similar to a tax; that is, it is a percentage of money which the University charges from any grant monies that the Center brings into Miami. These monies basically pay for the cost of the Center to be housed at the University (i.e., utilities, maintenance, use of University Departmental services).
it collects. Additionally, reallocation or reduction in state education-related budget monies (e.g., nullification of Ohio Board of Regents’ [OBR] financial support for Ohio Centers of Excellence; programmatic changes and/or decreases in OBR Improving Teacher Quality [ITQ] Program and Ohio Department of Education [ODE] Mathematics and Science Partnership [MSP] funds), as well as reorganization, merging, or withdrawal of federal education programs (e.g., within the National Institutes of Health [NIH] and the National Science Foundation’s [NSF]) have occurred affecting requirements for and the total amount of funds provided to complete the Center’s project evaluation work.

Despite influences from local-, state-, or federal changes over the years, the Center has managed to flourish, and remains a leader in providing evaluation and assessment services not only to clients across the US but also to state organizations and national stakeholders.

Figure 2 characterizes the organizational environment surrounding the Center, and identifies the various individuals, departments, and organizations within and outside of Miami University, who influence the Center’s work. My work specifically as an employee with the Center falls under the Center Coordinator category.

Figure 2. Organizational environment surrounding Ohio’s E & A Center.
**Organizational Structure/Environment**

As illustrated in Figure 3, the current organizational structure of the E & A Center has changed somewhat since inception. That is, in 2008 the Center’s structure changed from a hierarchical to a more lateral one, as a result of changes implemented by the Center Director (Dr. Sarah Woodruff). Arrows and items in red in Figure 3 reflect position eliminations and/or merging of employee responsibilities which occurred between 2008 and 2012. These organizational and structural changes were based on the Director’s goals for ongoing strategic growth and renewal of the Center. My current position as the E & A Center Coordinator is reflected in yellow in Figure 3—I remained in this position during my internship, and therefore was not given a separate title during my internship period.

![Figure 3. Organizational structure, including my position (E & A Center Coordinator), and changes to positions/responsibilities at Ohio’s Evaluation & Assessment Center.](image)

Dr. Woodruff still serves as the primary Director of the E & A Center, however, her changes to the Center’s organizational structure in 2008 placed a higher emphasis on each employee’s explicit role in helping the Center function and flourish. That is, the new structure reflected the idea that the
quantity and quality of work completed by the Center is highly dependent on not just the Director’s efforts, but on the combined efforts of all employees at the Center.

Currently, completion of the Center’s many projects typically requires the expertise of at least 6 different types of key employees within the Center’s organizational structure. The role and responsibilities of each of these employees are described below.

1. **Evaluation Principal Investigator**—this role is typically fulfilled by the *Center Director* who is held accountable for overseeing that the evaluation work of projects is completed, within budget, and in a timely and efficient manner.

2. **Evaluation Project Director**—this role is typically fulfilled by a *Research Associate* who is responsible for actually conducting and reporting on the evaluation activities of projects.

3. **Statistician**—this role is fulfilled by a *Statistician* who is responsible for developing tools for data collection during project activities as well as synthesizing, analyzing, and reporting statistical findings.

4. **Budgetary Staff**—this role is fulfilled by a *budgetary staff member* who is responsible for estimating the costs of the Center’s work, including maintaining and adjusting all project budgets according to changes in funding agency program demands, and therefore, a project’s evaluation needs.

5. **Support Staff**—this role is typically fulfilled by the *Center Coordinator* who acts as a point of contact for each project, in order to organize and communicate project activities; edit, design, and disseminate project deliverables; and process and supervise financial aspects of project sub-awards or external consultancy contracts.

6. **Graduate Assistants**—this role is fulfilled by *undergraduate/graduate students* who are responsible for helping to conduct research for projects, as well as organize, enter, and process data collected from each project’s activities.

**Organizational Culture**

As the E & A Center Director, Dr. Woodruff works to ensure the bottom line at the Center, which is to provide quality evaluation and assessment services to clients (in the form of products such as research or evaluation designs, instruments, and technical and evaluation reports); however, she also
monitors and leverages the overall well-being of the employees and staff members who help complete and sustain the Center’s work. In order to keep the Center functioning successfully, Dr. Woodruff practices both situational and transformational leadership style(s) by supporting the advancement of employees’ knowledge and skills as an investment into the Center’s overall system.

Most often, Dr. Woodruff practices situational leadership by providing support and guidance when employees are capable, yet not confident in their skills or abilities; providing opportunities for professional growth when employees are lacking in readiness for work-related tasks; and providing empowerment, by offering higher-stakes work which typically includes an increase in decision-making responsibilities related to Center work, once employees have reached a higher-level of ability. Transformational leadership is visible at the Center as nearly all active employees are either in the process of increasing their scholarly accomplishments (e.g., conference presentations, papers, publications) or earning higher degrees in areas related to work at the Center.

As a non-profit educational evaluation organization, the Center’s long-term sustainability depends on its ability to produce quality and timely work for clients, while also finding time to strategize about expanding its services and employees’ skill-sets as a means for staying ahead of the competition. Center employees understand the level of knowledge and skills they need in order to fulfill their individual responsibilities, and everyone continuously strives, through their work, to maintain a reputation at the Center that helps it stand-apart from competitors (e.g., other local evaluation, assessment, and research Centers). Each employee also clearly understands that his/her position is supported by external, soft monies which are affected by environmental changes (e.g., social, political, etc.) surrounding the Center and that his/her “job security is fleeing and tied expressly to whether one’s skills fit the organization’s needs at that time” (Eisenberg, Goodall, and Trethewey, 2009, p. 19). In this way, this type of social contract serves as a motivation for employees to continuously expand their knowledge and skill-sets and to invest in earning higher degrees; attending workshops, training, seminars; and in examining and expanding their skill-sets to align with the Center’s mission and vision. As discussed in the sections to follow, during my internship period, I tried to make sure that my internship activities contributed not only to my personal interests and goals, but also to my professional expertise as an employee contributing to the Center’s work.
Overview & Nature of My Internship Experience at the E & A Center

In general, I worked on a variety of projects during my internship. Most projects were chosen because of their potential to provide me with opportunities to polish or extend my current skill-set; while, some projects (e.g. NSF ADV Program Research and Digital Branding Client Project) were extensions of work previously started by the Center. As mentioned prior, the three key projects/PD activities I completed while at the Center included: 1) a National Science Foundation (NSF) ADVANCE Program Research Report, 2) a Grant Funding Opportunity Spreadsheet for the Learning Tree Farm (LTF), 3) a Digital Branding Client Project for the E & A Center; and 4) a Grant Professionals Foundation Scholarship Essay. Combined, these projects/activities required me to perform the following types of activities: extensive research, writing and editing, professional networking and consulting, and developing and planning of strategic marketing/public relations activities. Activities were performed in a variety of settings and included the following types of interactions or actions for completion—for a more detailed overview of my internship responsibilities and activities please see Chapter 2:

- Researching funding agency programs for Center work (e.g., NSF ADVANCE grant), for potential Center clients and their proposed projects (e.g., Learning Tree Farm Educational Program grant), and for graduate funding opportunities to fuel my own professional interests (e.g., applications for Miami’s English Department GEEF and Grant Professionals Foundation funds);
- Presenting and sharing research findings in informal written reports, formal PowerPoint presentations, via phone conferencing, and in both informal and formal face-to-face meetings;
- Attending professional trainings and academic conferences to learn more about grant writing, to network with others, and to market the E & A Center (e.g., Miami University Office for the Advancement of Research and Scholarship workshop and Grant Professionals Association Conference);
- Writing and editing various documents (e.g., informal research report, funding agency/opportunity excel spreadsheet, GPF scholarship essay, GEEF narrative, marketing/branding recommendations); and,
• Consulting and networking with potential Center clients, either virtually or face-to-face, to learn about their pre- and post-award needs and to establish relationships that might lead to contracts for services at the Center.

The nature of my internship while completing my work at Ohio’s E &A Center was somewhat unique. As mentioned earlier in this chapter, going into my internship, I was already an employee with the E & A Center. Due to my prior affiliation as the Center’s Coordinator, I was fortunate enough to be able to complete my MTSC internship at the place where I am currently employed. Though I was not assigned a separate title during my internship, for the most part, I was granted separate time to complete my internship activities above and beyond my existing responsibilities as E & A Center Coordinator. That is, I was given the liberty to devote a portion of my usual 8:00am – 5:00pm workday to my internship activities without penalty. However, my prior affiliation with the Center provided both advantages and disadvantages during my internship.

One major advantage was that I possessed an already-established familiarity with the Center’s employees, cultural environment, and the nature of their work. Another plus was that I had the liberty to focus my internship work on activities which not only supported the Center’s mission and vision, but also my own personal and professional interests and goals.

One disadvantage, at times, despite the Center Director’s (Dr. Sarah Woodruff) confidence in me, was in making a distinction between, and juggling both my regular Center responsibilities with my internship responsibilities. That is, sometimes my internship work and my Center work blurred together, and it was difficult not to let the pressures of time constraints of my Center Coordinator responsibilities over-shadow my internship experiences. Another challenge I encountered was in how to navigate my relationship with Dr. Woodruff as my boss, versus as my Internship Supervisor. In particular, often times Dr. Woodruff’s busy schedule required her to work overtime to meet demanding deadlines for the Center. During these times throughout my internship, it was difficult for me to expect her to also focus on assisting with my internship projects as my Internship Supervisor. Due to this challenge, in particular, I feel as though I did not get as many opportunities as I would have liked, to seek Dr. Woodruff’s guidance and mentorship regarding my internship work.

Perhaps the most daunting challenge I faced during my internship was how to deal with an unpredictable and un-stable workflow. As an employee with the Center, I had prior experiences dealing with these types of work; however, during the course of my internship, the plan for my work
shifted many times, which provided me with the difficult and disheartening challenge of figuring out how to refocus or find new work to complete. It should be noted that my challenges in dealing with shifting internship projects were not caused merely by the Center Director’s busy schedule and work deadlines, but also by the unpredictability of several clients’ project goals or needs during my internship.

Despite the fact that I faced several challenges during my internship, the disadvantages of my prior affiliation with the Center did not outweigh the advantages, and ultimately, I was able to learn something valuable from each of my internship projects. A brief overview of my internship work’s contributions to the Center’s mission and vision, as well as to my own knowledge and skills is discussed below.

Overview of My Work’s Contributions to the E & A Center and My Own Knowledge/Skills

As I discuss more fully in Chapter 2, several of my internship projects did not produce the types of outcomes or deliverables I originally hoped they would. That is, I had originally planned for work on the NSF ADVANCE Program Research Report to result in some type of new funding for the Center via a possible grant proposal submission and/or award. In a similar fashion, through my work on a Grant Funding Opportunity Spreadsheet, I had hoped to build a relationship with Learning Tree Farm (LTF) staff in order to obtain new work for the Center (i.e., via a contract for either pre- or post-award services). Set-backs and shifts in these projects occurred either as a result of environmental factors (e.g., social, political) or from unpredictable changes in clients’ needs (also discussed further in Chapter 2).

Despite issues with several of my projects providing substantial financial or contractual contributions to the Center, I believe that the growth and development I experienced as a technical communications professional, while completing my internship work, has already, and will continue to (indirectly) benefit the Center. As noted by the E & A Center Director Dr. Sarah Woodruff (also my Internship Supervisor), the Center’s cumulative efforts in gaining new funding and clients are unsuccessful about 70% of the time. Dealing with a 30% success rate can often times cause feelings of rejection or failure within the Center; however, it is the Center’s ability to forge ahead professionally and productively toward new opportunities that ultimately allows them to succeed in their work. As an intern (and staff member) with the Center, I experienced feelings of rejection and failure after several
of my internship projects were unsuccessful in producing financial compensation or new work for the Center; however it was through these experiences that I was able to gain personal and professional resilience in understanding how to navigate the field of non-profit work. That is, the combination of my internship project experiences ultimately helped to broaden my perspective on the nature, challenges, and hard-earned successes of non-profit work.

Shortcomings from my work on both NSF ADVANCE and LTF projects, did not hinder me in gaining experience in researching potential funding sources as well as in collaborating with potential future clients. Additionally for the LTF project, I was still able to learn how to effectively navigate various grants databases and search for funding opportunities. Due to my persistence in producing valuable and productive work during my internship, it was through my GPF Scholarship Essay and GEEF narrative, that I gained writing and editing experience and ultimately the ability to attend and network at the 2012 Grant Professionals Association’s (GPA) Conference. From my attendance at the GPA Conference, I also was able to share information about the E & A Center’s available services and ultimately advance my own scholarly accomplishments (i.e., through a GPA eNewsletter publication), (again, see Chapter 2).

Lastly, though my third project discussed in this report was not solely completed during my internship, I gained experience in all categories of my internship work (i.e., Researching, Networking/Marketing, Writing, and Editing) from the Digital Branding Client Project. Outcomes and deliverables from this project continue to influence my work as an employee with Ohio’s E & A Center in developing their marketing/branding and strategic planning efforts. These outcomes are discussed more fully in Chapters 3 and 4 of this report.

Overall, during my internship, I believe I learned a lot about myself as a person and as a professional, above and beyond prior experiences working at the Center. For instance:

- I learned that workloads can be determined by a number of environmental factors (e.g., social, political, etc.) in the Non-profit world; and as a result, I learned how to be flexible and adapt to shifting timelines/deadlines.
- I learned that as a proposal planner and evaluator, sometimes relationships with clients are unpredictable. Moreover, I learned that collaborations with clients do not always go as planned; that clients can change their minds about what they want and when they want it at
any point in time during a project; and, that it can be difficult to maintain a balance between the wants of clients with the actual needs/requirements of their work.

- I learned how to represent myself and the Center among other non-profit professionals. That is, I learned the necessary process for building relationships and possible collaborations with potential new clients. I also learned how to network with others professionals at academic events.
- I learned how not to become disheartened or complacent if/when the direction of my work changes or fails; and ultimately, how to refocus and forge ahead to seek out new work when necessary.

In essence, the summation of my experiences while interning at the E & A Center can be considered of greater value than any individual contribution that could have come from each of my projects, respectively. While not all projects contributed directly to the Center, each project helped strengthen a particular skill set for me personally.

In the chapters to follow, I summarize the three key internship projects and one specific professional development activity I completed during my internship with the E & A Center. More specifically, I discuss in detail how I was able to apply the professional writing, editing, and branding/marketing skills I learned in the MTSC program toward completion of each project; how and why each of my internship projects was developed; how the outcomes and deliverables (or lack thereof) that resulted from each project served the Center and my own knowledge and skills; and how much of the work I completed on one specific project (i.e., the DBC Project) impacted, and continues to contribute to the Center’s strategic marketing/branding efforts for organizational growth and development.
In this chapter, I describe the work I completed as part of my internship with Ohio’s Evaluation & Assessment Center (E & A Center). More specifically, I describe the types of work I completed, the time frame of this work, and the major factors that influenced the development and outcomes of my work. Chapter 2 concludes with a brief discussion of how my internship experiences contributed to my knowledge and skills as well as the E & A Center’s viability and mission.

**Internship Time Frame and Purpose**

My internship period with the E & A Center occurred between May 21st and August 24th, 2012. However, as I explain herein, a great deal of my internship work was shaped by two major influences: Work I completed during several of my MTSC courses prior to my internship; and, existing work I was completing as an employee at the E & A Center at the time of my internship. The overall purpose of my work was to support the Center’s ongoing efforts to better communicate with current clients, and to gain new clients and evaluation/assessment work, whether through direct assistance to clients or via enhancements to the Center’s marketing/branding efforts. As a result, part of this chapter discusses not only the work I completed during my internship, but also how my work was informed by several assignments from prior MTSC courses and the already established work I was completing as an employee at the Center. An overview of my key projects and internship activities is provided hereafter.

**Overview of Key Internship Projects, Activities, and Influences**

In the sections that follow, I describe three key projects I completed, as well as one professional development activity I participated in during my internship. For the most part, projects are discussed in the order in which they were completed; however, it should be noted that work for several of these projects overlapped throughout my internship. For each of the three projects, I discuss the project’s background, audience, and purpose; my responsibilities for each project, including the activities I completed in order to carry-out each responsibility; and the logistical details influencing the overall completion of each project (i.e., method and time commitment for completion, and any influences
from MTSC courses and my E & A Center employment). Specific examples of my work, as well as a brief description of several products and outcomes resulting from each project also are referenced. For a more comprehensive collection of work from each key project, see Appendices A through I of this report.

National Science Foundation ADVANCE Program Research Report

Description, Audience, and Purpose for the NSF ADV Research Report

Between Weeks 3 and 7 of my internship, I intermittently conducted research to learn more about the National Science Foundation’s ADVANCE (NSF ADV) Program. The amount of time I devoted to this research project was much less than originally anticipated as explained later in this section.

There were several reasons why I was asked to conduct research on the NSF ADV Program. Mostly, the E & A Center Director, Dr. Woodruff, wanted to learn more about the ADV Program in order to pursue possible future funding and/or publication opportunities. As a reference, the NSF ADV Program is dedicated to supporting the research and work of individuals whose projects help diversify the science and engineering workforce. More specifically, the program provides federal funds to projects that help develop and increase knowledge about the representation, advancement, and retention of women in science, technology, engineering, and mathematics (STEM) careers (NSF, 2010).

The first purpose for my research came from the Center’s interest in possible future NSF ADV Program funding. More specifically, this funding would potentially support a research project that would be aimed at analyzing data across multiple Institutional Transformation (IT) projects, over multiple years, to inform NSF ADV program-level efforts. In context, the E & A Center had a specific interest in the ADV program, based on its 5 years of evaluation and assessment work with several different NSF ADV-funded projects across the US (e.g., with Purdue University, Michigan State University, etc.).

The second purpose for my research was to find out more information about other ADV projects; that is, institutions or groups who also were awarded NSF ADV grants but with whom the Center was not currently affiliated regarding the evaluation of their projects. The Center wanted to know more
about other ADV projects and their activities, specifically regarding the different theories of change (or transformation), (NSF, 2012)² being used by each project, and also how each project’s affiliated site was working to support the advancement of women in the STEM workforce. By using data from the Center’s current NSF ADV evaluation projects, as well as information about several other NSF-funded projects, Center staff planned to draft a publication (e.g., either a journal article, book chapter, or formal presentation) on the activities and theories-of-change which seemed most (or least) successful in achieving institutional transformation to support women in STEM-related positions.

For this project, Dr. Woodruff was the originally intended audience, however, had a new proposal or publication been pursued, secondary audiences could have included NSF Program stakeholders, sites with NSF ADV projects, and/or experts within STEM education and employment areas.

**Methods for Completion of the NSF ADV Research Report**

The original research components of the NSF ADVANCE Research Project were solely my responsibility. I performed my work with minimal supervision, but did interact with Dr. Woodruff (E & A Center Director) throughout the project to discuss research planning, progress, and preliminary findings. Also, I did communicate briefly, via telephone, with the then NSF ADV Program Officer (Kelly Mack) about possible upcoming ADV or STEM-related solicitations.

In approaching the NSF ADV Research Report, Dr. Woodruff and I determined several major responsibilities to conduct, in order to learn more about the NSF ADV Program, its currently funded projects, and possible future funding opportunities within the program. To follow, I discuss each of the responsibilities and the activities I completed for the NSF ADV Research Report as well as outcomes from the project.

**Responsibilities and Activities in Completing the NSF ADV Research Report**

In order to learn more about the National Science Foundation’s (NSF) current ADVANCE (ADV) Program and possible future funding, I first reviewed NSF’s website for ADV Program information

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² In this context, theory of change (or transformation) relates to those NSF Institutional Transformation (IT) projects whose proposed work was related to “innovative and systemic organizational approaches to transforming institutions of higher education in ways that will increase the participation and advancement of women in STEM academic careers” (NSF, 2012, p. 2).
and news. Specifically, I looked for updates about current or upcoming changes to the program and for any available information about ADV funding opportunities. Using the most recent ADV Program solicitation or Request for Proposal (RFP), which at the time was last released in 2010, I reviewed the following sections: General Information (which included a current synopsis of the ADV Program), Proposal Preparation and Submission Instruction (which included proposal submission requirements and due dates), and Program Description (which included in-depth information about the ADV Program’s objectives and the different types of projects the program would support). In the RFP, I also came across the, then, NSF ADV Program Officer’s (PO) contact information. Following my initial research, I contacted the NSF ADV PO, Kelly Mack in an effort to learn more about future directions for the program, and the possible, future release date of a more current ADV Program solicitation/RFP.

For the project, I also reviewed Miami University’s Office for the Advancement of Research and Scholarship (OARS) website to look for funding agency information, specifically, upcoming NSF funding opportunities. Coincidentally, during Week 4 of my internship, OARS hosted a Grant Opportunities workshop which offered information on resources and tools that Miami had available for finding funding agency information and opportunities. In order to further increase my knowledge of how to search for, and stay up-to-date on, potential funding opportunities, I was granted permission by Dr. Woodruff to attend this workshop. During the OARS workshop, I learned about Miami’s Pivot.cos database which provides a plethora of advanced search options when researching funding opportunities. One thing I learned was that the database provides the opportunity to build a personal profile in order to network and share information with other professionals with similar research interests. Following the workshop, I signed-up for “MyNSF” via NSF’s website which allowed me to receive a Weekly Digest Bulletin from the NSF. By using “MyNSF,” I would receive timely updates regarding overall NSF agency news, in addition to updates specifically related to possible NSF ADV Programmatic changes and future funding opportunities.

Another major component of the NSF ADV Research Report was to research previously funded ADV projects, specifically a variety of projects not already being evaluated by the Center, in order to learn about their goals, activities, and theories of change. To find this information, I searched again on NSF’s website and retrieved NSF-published abstracts for several different Cohort 4 (i.e., groups/institutions awarded ADV projects in 2008) Institutional Transformation (IT) projects without
prior affiliation to the Center. Dr. Woodruff helped in narrowing down which of the narratives to review—In all, she chose abstracts for four different projects for me to review. See Appendix A for a sample of these abstracts. Once specific NSF ADV Cohort 4 projects/institutions were targeted, I reviewed and compared each of their abstracts looking for similarities and differences related to project structure and implementation. Links or URLs for each affiliated NSF ADV project’s websites were provided in each abstract; and so, I also briefly skimmed each of the four project/institution websites to learn additional information about their ADV project activities, efforts, and impact, to date.

Throughout the *NSF ADV Research Report*, I briefly summarized and discussed preliminary NSF ADV Program research findings with Dr. Woodruff. Findings were reported either via email communications or informal face-to-face meetings.

It should be noted that completion of my research on the NSF ADV Program was supposed to serve as a stepping stone for future work in which I was to assist Dr. Woodruff with at least one other major project during my internship. Again, during the early stages of my internship, these future projects were projected to be either assistance in the writing or editing of a new NSF grant proposal, or a professional publication on theories of transformation for institutional work environments for women in STEM fields. Unfortunately, as I discuss in the *Findings and Outcomes* section for the *NSF ADV Research Report*, additional components to my NSF ADV Program research did not come to fruition due to schedule conflicts and/or time constraints at the Center.

**Findings and Outcomes from the NSF ADV Research Report**

Preliminary research from the *NSF ADV Research Report* revealed that NSF’s ADVANCE Program was experiencing changes in programmatic direction as well as budget reviews that could potentially result in reduction or re-allocation of funds. These changes began after NSF ADV project awards occurred in 2010, and were still under negotiation when I researched the program in Spring 2012. As a result, NSF had not published any new solicitations for funding of future ADV projects since 2010. My communications with the, then, NSF ADV Program Officer (Kelly Mack) confirmed that the release date for a new solicitation could not be projected at the current time.
The four NSF ADV-awarded projects targeted for investigation came from the following institutions: North Dakota State University (NDSU), Ohio State University (OSU), Rutgers University (RU), and Washington State University (WSU). As mentioned prior, these particular sites were chosen because they came from the same NSF Cohort (i.e., groups/institutions awarded ADV projects in 2008) as did other projects affiliated with the Center (i.e., Purdue University, Michigan State University, etc.); however, the difference with the NDSU, OSU, RU, and WSU sites was that the E & A Center was not currently conducting evaluations for these particular four NSF ADV projects.

In reviewing NSF ADV award abstracts for NDSU, OSU, RU, and WSU, I learned basic project-related information, such as geographical location, principal and co-principal investigator names, award amount, and estimated start and end dates for each project. The main text of each abstract also summarized each project’s goals and initiatives; however, this information alone did not provide me with enough details to accurately gauge each project’s theory-of-change, methods for examining institutional transformation, or their anticipated outcomes and impact.

Further research on each of the four project’s websites revealed additional resources for learning more about project initiatives, activities, and impact. Resources included calendars or lists of past and current project events, internal and external project reports, and academic publications or presentations produced as a result of each project.

Dr. Woodruff did not require me to complete a formal research report in order to review and discuss preliminary findings from my research on the NSF ADV Program and its projects. Additional resources from project/institution websites were mentioned during our discussion of final research findings; however, I was never required to download or provide any of these tangible items to Dr. Woodruff for further review. Following discussion of NSF ADV Research Report findings, Dr. Woodruff decided that further research on the NSF ADV Program would not be necessary for several reasons.

First, because NSF’s ADV Program did not release a new solicitation for funding between 2010 and my internship, and because the NSF was unsure when they would, this delayed the Center’s pursuit of a new NSF proposal to support an in-depth review of their already established ADV evaluation work. In addition, due to the unpredictability of NSF ADV programmatic changes, the Center was unsure of how NSF’s goals and objectives for the ADV Program might change. Therefore,
producing a professional publication discussing project outcomes based on the program’s current aims seemed less beneficial to the Center and other stakeholders than originally thought.

It should also be noted that a third factor hindering further work on this project included Dr. Woodruff’s and other Center staff members’ (including myself) current work responsibilities. That is, during the NSF ADV Research Report, the Center became occupied with project start-ups and evaluation reporting deadlines stemming from several new and continuing Center projects, which were either funded or extended at the time of my internship. These were all projects that prior to my internship were still pending.

Though several factors hindered the outcome(s) of the NSF ADV Research Report (i.e., the E & A Center’s ability to further pursue a grant proposal or a professional publication related to the NSF ADV program) my original research work was still accepted by Dr. Woodruff and remains on hand at the Center for future reference and work.

Since my internship, I can report that a new NSF ADV Program solicitation has been released; however, the Center has turned their focus to investigating funding for a newer, similar program entitled Promoting Research and Innovation in Methodologies (PRIME) Program. Several of the NSF PRIME Program’s aims are similar to those originated by NSF’s ADV Program (e.g., “exploring innovative approaches for determining the impacts and usefulness of STEM education projects and programs; and, building on and expanding the theoretical foundations for evaluating STEM education and workforce development initiatives, including translating and adapting approaches from other fields” [NSF, 2014]). Since my internship, no new NSF proposals have been directly submitted by E & A Staff; however, they have met several times to discuss the development of either an ADV or a PRIME proposal/project proposal. The E & A Director still plans to write a proposal based on data from existing evaluation projects; however, this task likely will not occur until she and Center staff gain more time for this type of work beyond their already existing project evaluation responsibilities.

*Learning Tree Farm (LTF) Grant Funding Opportunity Spreadsheet*

**Description, Audience, and Purpose for the LTF Grant Funding Opportunity Spreadsheet**

During weeks 4-5, 7-9, and 11-12 of my internship, I worked on a project for a local (Moraine, OH) educational farm, the Learning Tree Farm (LTF). For this project, I spent the majority of my time
researching funding opportunities for the LTF. Toward the end of the project, I also marketed the E & A Center’s services in an effort to gain follow-up work with the LTF—such work would have involved providing grant proposal writing/editing or evaluation/assessment services. Unfortunately, as mentioned later in this section, there were some unexpected limitations to my overall work with the LTF.

The focus of my work for LTF was to assist them in finding potential funding opportunities from local and regional funding sources. The resulting product of this project included a **LTF Grant Funding Opportunity Spreadsheet** which outlined funding agencies and organizations with goals and initiatives similar to those of the LTF, and which had active solicitations for possible funding related to the LTF’s 2012-2013 educational programs. It should be noted that the LTF funding opportunity spreadsheet was not an originally proposed project, but was added to my internship work load with the approval of my Internship Supervisor Dr. Sarah Woodruff, also the E & A Center Director) and my MTSC Chair Dr. Michele Simmons, to help compensate for the lack of work produced by my earlier NSF ADVANCE Program research project.

The purpose for providing the LTF with a spreadsheet of funding opportunities was two-fold. The guide was meant to serve as an overall source of information about possible future funding opportunities for the LTF’s educational programs through Summer 2013. The second, more immediate purpose, was to target one or two specific funding opportunities that the LTF Director Mr. Dudley Bray could use in order to write a grant and gain financial support for one or several of the farm’s specific educational programs (e.g., “Farm, Fun, and Fitness,” “Autumn on the Farm,” “Discover Our Natural World,” and “Inside the Garden Box”).

The primary audience for the **LTF Grant Funding Opportunity Spreadsheet** included the LTF’s original founders, Ms. Jean Ryan and Ms. Sally Keyes and the LTF Director, Mr. Bray. Additionally, if information from the spreadsheet were used to gain funding for an LTF 2012-2013 program, it also could have potentially benefited a secondary audience, including Grades K-12 teachers and students who might visit the farm to attend an educational program during the academic year.

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3 My search for funding opportunities was limited to non-Federal agencies, at the LTF founders’ request; that is, the LTF group did not have a lot of experience or adequately skilled staff who could work to gain these types of funds which, typically, involve complicated application and submission processes.
Methods for Completion of the LTF Grant Funding Opportunity Spreadsheet

I conducted the majority of activities for developing the LTF Grant Funding Opportunity Spreadsheet, however, another Discovery/E & A Center staff member, Ms. Sara Hayes (Discovery Center Coordinator) assisted with the project as well. At the time of my internship, Ms. Hayes was completing a grant writing course (EDT 699) which taught skills pertinent to the activities of the project. As such, Ms. Hayes assisted with some of the database searches as well as attended the final, formal meeting with the LTF founders in which funding agency/opportunity findings were discussed. I did, however, solely conduct periodic email communications and phone calls with the LTF’s founders throughout the project, mainly to exchange information about the farm’s current educational programs, past funding sources for programs, and to discuss the LTF’s desire to avoid federal funding sources, if possible. The majority of activities for this project did not require the E & A Center Director, Dr. Woodruff’s supervision.

For the LTF Grant Funding Opportunity Spreadsheet, I determined three, overall responsibilities in finding funding agency information and funding opportunities for the LTF. To follow, I discuss each of my responsibilities and the activities I completed in-order to fulfill each responsibility, as well as outcomes from the project.

Responsibilities and Activities in Completing the LTF Grant Funding Opportunity Spreadsheet

In order to construct a Grant Funding Opportunity Spreadsheet for the LTF, I first had to find a means for accurately researching up-to-date information on available funding agencies and opportunities. Fortunately, from my prior participation in a Miami University Office for the Advancement of Research and Scholarship (OARS) workshop during my first internship project, I learned about two tools (i.e., the Pivot.cos and The Foundation Center’s databases) which could help me in completing my work for the LTF.

With funding agency/opportunity database tools in place, my Discovery/E & A colleague Ms. Hayes and I were able to perform several searches for funding agencies with funding opportunities relatable to the LTF. In order to ensure that our Pivot.cos and Foundation Center’s database searches were efficient, Ms. Hayes and I reviewed the LTF’s website to better understand their overall mission and
structure, as well as the objectives of several of their educational programs. We used key words from the LTF’s mission and educational programs (e.g., “outdoor education,” “youth education,” “nature,” “science,” “youth physical fitness,” “youth education,” etc.) along with other appropriate search criteria (e.g., geographical location, type of funding [state private, federal], timeline/deadline of funding agency solicitations, etc.) to narrow down our database searches. Controlling search criteria within each database allowed us to produce (or find) the most pertinent funding agency and opportunity information related to the LTF’s funding needs and initiatives. Periodic communications, as well as additional resources provided by LTF staff (e.g., LTF annual reports, lists of past funders, previously submitted proposals) also allowed Ms. Hayes and me to better understand the LTF’s past contracts with funders, their specific funding needs, and their capacity for future proposal submissions.

Database results for over a dozen funding agencies (e.g., agency or sponsor name; purpose or mission of each agency; agency proposal/grant opportunities, limitations, or requirements, etc.) were copied into an Excel spreadsheet which was later shared with LTF staff. Final funding agency/opportunity information from the project was condensed and organized based on consultation with LTF founders via email communications and telephone, as well as the additional resources which were provided to Ms. Hayes and me throughout the project.

During later stages of the project, the LTF founders suggested that I might assist the farm’s Director, Mr. Bray, in writing a grant proposal to one of the relevant funding agencies discovered during our database searches. As a result, I used the initial list of potential funding agencies and opportunities that was created to highlight and further research one or two specific funding opportunities which I thought the LTF could target or pursue. The goal of this grant proposal would be to gain support for the farm’s 2012-2013 educational program efforts. I used knowledge from past MTSC grant writing courses, from my experiences working on E & A Center related proposals, and from LTF suggestions and provisions, in order to decide which funding agencies/opportunities to focus on. Based on my prior experience with grant proposals, I knew that the best funding agency/opportunity matches would be those whose mission and goals aligned most with the LTF’s initiatives. I also chose specific funding agencies/opportunities based on their grant proposal application and submission requirements. That is, I based my choices on the knowledge I had regarding the LTF staff’s capacity for writing and submitting grant proposals. Overall, the most suitable funding agencies/opportunities that I highlighted were those that provided non-Federal funds,
that were aligned with the LTF’s mission and the initiatives of their educational programs, and which had achievable submission requirements and deadlines for the LTF’s staff (i.e., less complicated application packets, and deadlines prior to the LTF’s 2012-2013 educational program season).

Findings and outcomes from the LTF Grant Funding Opportunity Spreadsheet are reported in the section that follows. As noted below, after reporting funding agency/opportunity information to the LTF founders, I was hopeful that my initial work might act as a stepping stone for additional work during my internship. Unfortunately, as I explain hereafter, and similar to circumstances with the NSF ADVANCE Program research project, additional work with the LTF did not occur due to constraints with LTF deadlines and staffing limitations.

Findings and Outcomes from the LTF Grant Funding Opportunity Spreadsheet

The final product developed for the LTF included an Excel spreadsheet with information on 18 funding agencies or opportunities (see Appendix B). Information in the spreadsheet was organized by funding agency or sponsor name; purpose or mission of the funding agency; funding agency proposal submission limitations or requirements; and, funding agency URL and contact information. Key words that had been used during database searches, pertinent to each individual agency/opportunity database result, also were included in the Excel list. Key search words were added into the final Excel spreadsheet as a guide to LTF staff, in case they wanted to perform similar searches in the future to find additional (or other) funding agencies/opportunities.

On July 19, 2012, Ms. Hayes and I met with the LTF Founders (Ms. Jean Ryan and Ms. Sally Keyes) to share and discuss our Excel list of funding agency/opportunity findings. During our discussion, I proposed the two major agencies/opportunities which I thought best matched the LTF’s immediate education program funding needs (i.e., The North Face Company’s Explore Fund and the Champions for Healthy Kids/General Mills Foundation Grants Program). Toward the end of the meeting, Ms. Ryan and Ms. Keyes asked if I would be willing to work with the farm’s Director, Mr. Bray, to write and submit a proposal to one of the targeted funding agencies. Following the meeting, I continued to

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4 During mine and Ms. Hayes’ earliest searches, federal funding sources were included; however, these were later stripped from preliminary findings and excluded from future searches based on conversations with LTF staff about their specific wants and needs.

5 The LTF Director could not attend the final meeting to discuss project findings, due to several deadlines with projects and annual reporting requirements.
communicate with the LTF Founders to proceed with plans for writing a grant proposal. In particular, and at the suggestion of LTF staff, I turned my focus toward researching The North Face Company’s Explore Fund. Additional research included perusing The North Face Company’s website to find out more information about their upcoming proposal submission opportunities, requirements, and deadlines.

Unfortunately, during Week 11 of my internship however, Ms. Ryan contacted me and requested that I delay my work in preparing to write a grant proposal. When I inquired about reasons for the delay, she responded that Mr. Bray wanted more time to review the information Ms. Hayes and I had provided during the final luncheon meeting regarding funding agencies and opportunities. Mr. Bray wanted to ensure that North Face’s Explore Fund was the most appropriate funding source to pursue. The LTF Founders and Director also wanted to wait until a more opportune time when they could fully focus on writing a new grant proposal. In sum, by the end of my internship, LTF staff had become busy with deadlines for annual reports, with several marketing projects, including revision to information on their website, and with demands in preparing for several of their upcoming (already funded) education programs.

My hope for assisting the LTF Founder and Director in writing an Explore Fund grant proposal was to gain additional grant proposal writing experience beyond my current capabilities. Exercising and expanding my grant writing skills would not only be valuable to me personally and professionally, but it also to my work as an employee at the E & A Center. Additionally, if I had assisted in writing a proposal with the LTF, and it were funded, the Center could have potentially proposed to serve as the evaluator of this project.

Despite setbacks in writing a grant proposal for the LTF, my original funding agency and opportunity research was not hindered and I do believe it served the LTF founders and Director very well. Since my internship, I have had a chance to follow-up with the LTF Founders. Of late, I learned that the list of funding agencies/ opportunities Ms. Hayes and I provided to the LTF is still being referenced by the LTF Director, and that he recently hired a part-time, experienced grant writer who could devote more adequate time to writing proposals for future LTF education program funding. Though I could not provide grant writing assistance to the LTF staff, I was pleased to hear that they hired a new employee who could take-on this work. From experience, I know that writing grant proposals is something that requires adequate skills as well as a designated (and dedicated) amount of time and focus.
E & A Center Digital Branding Client (DBC) Project

Description, Audience, and Purpose for the Digital Branding Client (DBC) Project

As mentioned in Chapters 1 and 2, while participating in the MTSC Program and fulfilling my internship requirements, I also worked full-time as an employee for Ohio’s Evaluation & Assessment Center (E & A Center). In fact, this work-school scenario existed throughout the entirety of my participation in the MTSC program. As such, while completing my MTSC courses, I tried to stay conscious of not only how my course-work could enhance my personal and professional knowledge and skills, but also how it might contribute to my work with the E & A Center. Over the past few years, I have been able to concentrate many of my MTSC assignments/projects on meeting several of the needs of the E & A Center. Many of these specific assignments/projects have built on one another, and for the most part, impacted the E & A Center’s report writing/editing and/or their marketing and branding strategies. For the purposes of this report, I would like to discuss one or two of these influential MTSC assignments because although I worked on some of them either prior to, or after my internship, there is one particular project (i.e., Digital Branding Client (DBC) Project) that continues to significantly contribute to my work at the Center, to the Center’s overall marketing/branding practices, and essentially their viability and mission.

To follow, I describe the Digital Branding Client (DBC) Project as my 3rd internship project. Information regarding this project serves as the basis for the majority of content throughout the final chapters of my internship report. That is, Chapter 3 offers an in-depth overview of the many components of the DBC Project; while, Chapter 4 examines the successes and failures of the strategies used for completing the DBC Project, reflects on the possible challenges and implications of fulfilling certain aspects of the DBC Project, and the ways in which outcomes of the Center’s revised marketing/branding efforts will need to be further researched, monitored, and/or sustained by the Center. Before delving into the responsibilities and activities completed during the Digital Branding Client (DBC) Project, I would first like to provide some initial background information about this project to explain how and why it was developed.
Additional Background Information for the Digital Branding Client (DBC) Project

As mentioned prior, the nature of the DBC Project was much different than that of my other internship projects. To begin, the DBC Project was formally developed in my Interactive Media Studies (IMS) 419/519 MTSC Program course during First Semester 2012-13. However, the project actually built-on an Organizational Case Study Analysis assignment about the Center, which I completed during an earlier (Second Semester 2011-12) MTSC course (i.e., Communications Independent Study [COM] 677). The Organizational Case Study Analysis itself was influenced by marketing/communications planning that was prompted in 2008 by one the Center’s main funding agencies, the Ohio Board of Regents (OBR). As a reference, since the Center’s inception in 2003, the OBR had been a major source of funding for the Center. Unfortunately, toward the end of 2008 (due to changes in state and federal budget re-allocations), the OBR could no-longer provide funding to the E & A Center (among other Centers of Excellence in Ohio). Rather than abandon each of the Centers it supported, the OBR held several meetings in 2008 and 2009 to assist these groups in designing future marketing and communications plans. The OBR’s goal was to equip each Center with the tools and resources necessary for finding supplemental funding sources, and essentially, new work that could help sustain each organization after the end of official OBR funding.

As Center Coordinator for the E & A Center, part of my job responsibilities for the past 7+ years have been (and are) to contribute to the Center’s marketing and branding efforts. In this sense, whenever any of my MTSC courses required client-based marketing/branding type projects, I took advantage of such opportunities and tried to align my course-work with my efforts at the Center. Hence, this is why several of my MTSC course projects in COM 677 and IMS 419/519 used the E & A Center as a targeted audience. As mentioned prior, within my IMS 419/519 course, I completed the DBC Project. The two main purposes of this project, which related to my work at the Center, included: 1) to expand on the Center’s marking/communications efforts from 2008/2009, which were still somewhat vague and outdated even after guidance from OBR; and, 2) to identify and provide information on industry-leading marketing/branding strategies suitable for implementation at the Center. With these purposes in mind, the DBC Project focused on learning more about 1) how Center partners/clients as well as other similar businesses were using marketing/branding techniques in comparison to the Center; and 2) how the Center could use new marketing/branding techniques, via online outlets (e.g., website, Facebook page, LinkedIn account, etc.) to provide beneficial interactive
resources for current or potential clients, and to ensure sustainability and representation of the Center as a major competitor in providing quality evaluation and assessment services. All DBC Project activities were focused on providing the Center with the information they needed to more extensively and appropriately use either the Web, social media, or other relatable online resources as part of their overall marketing/branding strategies.

The primary audience for the DBC Project included the E & A Center Director Dr. Sarah Woodruff, the Center’s Senior Research Associate Mr. Christopher Cox, and the Center Coordinator (myself). A secondary audience included anyone (e.g., current or potential clients and partners) who might visit or interact with the Center via their marketing/branding outlets, whether to find resources for current projects, to learn about evaluation and assessment, or to find information about requesting the Center’s services. Additional supplementary background text and in-depth details regarding the development of the Digital Branding Client (DBC) Project are provided in Chapter 3.

Methods for Completion of the Digital Branding Client (DBC) Project

I was one of seven team members who completed the DBC Project for my IMS 419/519 course. Though the project was a team-effort, I had several specific responsibilities which contributed to the project’s overall completion. Work I completed, related to the DBC Project, included research and reporting on the Center’s communications, marketing, and branding practices in relation to that of Center partners/competitors; analyses of data collected from the project; as well as later revisions (i.e., writing/editing) to several of the Center’s marketing resources (e.g., content for their website and new social media outlets).

In the sections that follow, I provide information about my own and my team’s responsibilities and activities for the DBC Project, as well as several findings and outcomes from the project. In addition, I discuss the follow-up work that was created as a result of the project after my IMS course, some of which was completed during, as well as beyond my internship period, and how the project contributed to my own knowledge as well as to the E & A Center’s ability to enhance their marketing/branding strategies.

I fulfilled multiple roles for the DBC Project—I acted as a client from the E & A Center; that is, as a primary contact from the Center for my IMS 419/519 team, and as a contributing project member within my team.
Responsibilities and Activities for Completing the Digital Branding Client (DBC) Project

Due to the scale and projected complexity of the DBC Project, my IMS 419/519 team and I, first, needed to establish an overall goal and set of objectives for the project. These were developed based on information provided by the E & A Center regarding limitations with their past marketing/branding efforts, their current goals for this work, and their overall capacity in enhancing or implementing new marketing/branding efforts in the future.

In result, the overarching goal of the DBC Project was to provide the Center with the information they needed, beyond their current knowledge, to more extensively and appropriately use either the Web, social media, or other relatable online resources as part of their overall marketing/branding strategies. The project’s objectives, which are more thoroughly described in Chapter 3, were based on meeting the DBC Project’s overall goal, were guided by IMS 419/519 course requirements and literature, and were centered on completing the two major components of the project:

- **Component 1** – To conduct necessary research that would advise our IMS team regarding the Center’s online presence, how the Center’s current presence was being viewed or used by Center partners/clients, and how the Center’s marketing/branding strategies measured in comparison to those of their competitors/partners; and

- **Component 2** – To use findings from data collection activities in order to provide new, informed marketing/branding recommendations to the Center.

Once an overall goal and main objectives were created, my IMS team and I then created a design that encompassed data collection and reporting methods that would allow us to complete each major component of the project. Scholarly literature from our IMS course, and several of my previous MTSC courses which provided pertinent marketing, branding, and organizational business concepts, were referenced to guide research and data collection methods. Marketing/branding concepts referenced during the project’s development came mostly from IMS 419/519 course literature and focused on how businesses’ can engage in and benefit from competitive virtual commerce. This concept seemed appropriate in guiding activities of Component #1 of the DBC Project, as it related to the idea of how businesses or organizations could increase the reach and richness of their brand/name by competitively navigating and/or utilizing the Web (Evans & Wurster, 1999). Another concept referenced which was used to guide Component #2 of the project was the organizational business model of environmental
This model involves the process of paying attention to what is going on in a particular organization’s or businesses’ industry as an informative and competitive marketing/branding strategy (Eisenberg et al., 2009). It should be noted that several of the DBC Project research activities for both Components #1 and #2 also were guided by my professional data collection and analysis knowledge which came from prior, similar work experiences as an employee at the E & A Center. To follow, I discuss activities completed for the DBC Project for each major component. Findings from each activity are provided later in Chapter 2.

**DBC Project Component #1 Responsibility and Activities**

My IMS team and I conducted four major research activities in order to complete Component #1 of the DBC Project. For the first research activity, we collected information on the E & A Center’s current online presence. We collected this information in order to learn whether or not the Center’s current marketing strategies and resources were helping them in meeting their marketing/branding goals. For this activity, our team performed an informal assessment of the format and content of Center’s current online marketing/branding presence, which at the time of the DBC Project only included their website. The assessment was performed using Forrester Research, Inc.’s *Website Brand Action Review 3.0 Scorecard* (Rogowski, 2010). We used this scorecard because it provided several criteria with which to rate or measure different aspects (e.g., menu/sub-menu category clarity, overall site performance and layout, use of graphics, etc.) of the Center’s website.

During our assessment, my IMS team and I collectively observed and examined each of the Center’s various website pages in relation to pertinent scorecard criteria. Following the assessment, we collaboratively summarized what we observed into overall strengths and weaknesses of the website using GoogleDocs.

For the second research activity under Component #1, my team and I collected information from E & A Center clients/partners to gauge how the Center’s current marketing/branding efforts were (or were not) helping to build stronger relationships with their current clients, and second, how such

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7 As a side note, *environmental scanning* was a concept that I explored during my COM 677 Organizational Case Study Analysis of the Center, which I carried over into my IMS 419/519 coursework.

8 In general, at the time of the DBC Project, the Center’s marketing/branding goals included attracting new clients/work; providing clients with information and resources related to their field(s); and, maintaining a professional image amongst other evaluation and assessment competitors/partners.
efforts might (or might not) also be supporting new relationships with clients or attracting new work. For this activity, we conducted interviews with a variety of Center clients and/or partners. A list of appropriate Center contacts was provided by the Center Director (Dr. Woodruff) and their Senior Research Associate (Mr. Cox) for the interviews.

A total of six different Center clients or partners were interviewed using two different (i.e., client vs. partner) interview protocols which were developed by our IMS team and E & A Center staff. Protocols consisted of 10 open-ended questions asking participants about their experiences, perceptions, and preferences related to the Center’s communications/marketing strategies. Informative text, which also was guided by Center staff, was included at the beginning of each protocol and thanked participants for their time; explained the anticipated length of the interview; asked participants for their verbal consent in recording interviews, to assist in accurate record keeping; and, assured participants of the confidentiality of their responses going forth. Interviews were conducted over the phone and took roughly 30 minutes to complete. To assist with later review and analysis of feedback, interviews were audio-recorded, and my IMS team members and I took notes throughout interview discussions with clients/partners. Several Center clients/partners, who could not participate in actual phone interviews, provided feedback via email instead.

Following the interviews, audio recordings were transcribed by each interviewer (i.e., an IMS group member). These texts, along with additional notes and/or email responses which were recorded during interviews were collectively added into one GoogleDoc file and organized by interview protocol question. My IMS team members and I analyzed interview responses as a whole for each protocol question using the constant comparative method (Creswell, 2013). My IMS team and I used this method of analysis in hopes of finding common or repeated themes among interviewee feedback. Any common or repeated themes which were identified from interviews were later used to guide and confirm marketing/branding recommendations during Component #2 of the project.

The third research activity for Component #1, involved collecting information about the online presence of several Center partners, competitors, and affiliates. For this particular activity, our team practiced the method of environmental scanning as it allowed us to investigate the marketing/branding efforts of other similar evaluation and assessment groups or businesses in comparison to the Center. From these efforts, our team hoped to use information about how other similar organizations were

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9 It should be noted that International Review Board (IRB) approval was not required for this data collection activity, as none of the interview findings were to be reported or shared beyond our IMS team and Center employees.
representing themselves online, in order to also later make informed recommendations for how the Center could enhance and modernize their own marketing/branding efforts. For instance, if the Center enhanced their website and/or created content via potentially new marketing/branding tools (such as social media), in similar ways as others in their industry, such efforts might help them to also spread their brand to a wider audience, and/or gain a more competitive edge within the evaluation and assessment industry.

To begin the environmental scanning process for this activity, my team and I first came up with a list of the most pertinent competitor or partner organizations to research. We referenced a list of 25 regional and/or national evaluation and assessment research partners, competitors, and affiliates, which had been created by the Center during their prior, 2008 Ohio Board of Regents communications/marketing planning efforts. On behalf of the team, I worked with Dr. Woodruff to narrow down the list from 25 to 14 organizations to research. Businesses/organizations chosen were those whose work was most likely to rival that of the Center.

Research for this activity was divided up, as evenly as possible, among about half of my IMS group members. Each person conducting research searched the Web to learn about the online presence (i.e., marketing/branding activities and online content) of each of their assigned businesses/organizations. No formal protocol was developed for the review; however, my team members and I referred to a Social Media Client Benchmarking Template by the OTHER media group (Briggs, 2010), which offered a framework for collecting data about the creation and status of a business or organization’s social media strategies. Upon review, each team member gauged whether or not a particular business or organization’s website was noteworthy, and if it had a robust online presence (i.e., several SM accounts). If either of these two circumstances existed, special attention was then given to learning more about the types of content used to populate that particular organization’s website or SM accounts. Strengths and weaknesses of each organization’s current web presence (e.g., navigability and presentation of website content); the frequency of uploads/updates to the content of each organization’s websites and/or SM accounts; the availability of sharing or “follow us” options on each organization’s website/SM accounts; and the number of persons interacting with or exchanging content via each organization’s website/SM accounts were noted. A GoogleDoc again was used for creating, storing, organizing, and sharing results from our research.
Those IMS team members who did not participate in researching Center partner/competitor organizations, instead, reviewed the collective research findings provided by the rest of the team. Data were reviewed as a whole across all 14 organizations, and significant items regarding each business/organization’s SM outlets (e.g., website, Facebook, Twitter, Blog) were noted. Information regarding which organization had the most significance presence for each type of SM; which organization had the most number of users or most user interaction for each type of SM; and which organizations most often updated the content on their SM outlets were reported during final stages of the DBC Project.

For the fourth and final activity for Component #1, my IMS team and I decided to collect additional information on the Center’s website, in order to better gauge the status of the Center’s current online presence. For this data collection activity, my IMS team and I conducted informal usability testing of the Center’s website. From our usability testing, we hoped to learn more about how the Center’s website was being used by, and how it might be affecting or influencing users (e.g., current and potential Center clients, Center partners, and education and evaluation professionals).

As with the team’s first research activity under Component #1 (i.e., informal analysis of the Center’s website), usability testing tasks were influenced by criteria on Forrester Research, Inc.’s Website Brand Action Review 3.0 Scorecard. Usability performance tasks were developed with the assistance of the IMS 419/519 instructor and were designed to measure the availability, accessibility, and clarity of content on the Center’s website. Unfortunately, due to time management issues for this portion of the DBC Project, our team had to use students from our IMS course, who were not a part of the DBC Project, rather than actual Center partners or clients to participate in the usability testing. In all, five IMS students, who were selected by our instructor, participated in the usability testing.

During usability testing, participants were asked to perform 11 different usability performance tasks on the E & A Center’s website. Participants’ performance during the testing was timed and observed, and notes were recorded regarding the outcomes (i.e., completion vs. non-completion) of tasks. Also during observations, special attention was given to gauge the level of ease or difficulty in performing each task. Work for this activity was divided amongst my IMS group members; that is, while one team member read aloud the tasks that were to be performed, another person timed each user, and yet another person took notes on participants’ overall comfort and ability in performing usability tasks.
Since time and resources were limited for this final research activity, results from the usability testing were never analyzed by my IMS team nor were they used when making later recommendations to the Center regarding changes to their marketing/branding strategies. Instead, a final summary of raw data collected from usability testing was provided to the Center at the close of the DBC Project. A brief description of Component #2 activities is offered next.

**DBC Project Component #2 Responsibility and Activities**

Component #2 responsibilities and activities for the DBC Project involved reflection on and application of findings from Component #1 data collection activities. As such, the majority of text in the *Findings and Outcomes* section for the DBC Project (to follow) is comprised of information regarding Component #2 activities, which included the process of providing new and informed marketing/branding recommendations to the Center. Also in the *Findings and Outcomes* section for the DBC Project, I describe several tasks I completed as follow-up work during my actual internship which involved re-examining the marketing/branding recommendations reported to the Center by my IMS 419/519 team.

*Findings and Outcomes from the Digital Branding Client (DBC) Project*

To begin, I can report that the DBC Project was successful in meeting IMS 419/519 assignment requirements which included a) examining a client’s current digital branding techniques, b) conducting primary research to determine how a client’s current marketing/branding strategies are performing, and c) delivering a 20-30 minute presentation to report findings from research and provide client-specific recommendations to improve digital branding practices. As a result of my team’s work, we earned an “A” for our assignment, not to mention, we successfully provided the E & A Center with the necessary information they needed to begin addressing some of their marketing/branding needs and goals. That said, the majority of Component #2 responsibilities and activities for the DBC Project involved reviewing findings from research activities, in order to make informed decisions about the best marketing/branding recommendations to provide to the E & A Center during development of final deliverables for the project.
Overall, two types of marketing/branding recommendations were provided to the Center. These recommendations were summarized in our team’s final PowerPoint project presentation which was presented to the Center toward the end of our IMS course. In our presentation, we recommended ways the Center could revise the content and format of their website, and additional communication/marketing tools they could use (e.g., social media) in order to enhance their online presence. Recommendations for revisions to the Center’s website were guided, in large part, by findings from our team’s informal assessment of the Center’s online marketing/branding presence, as well as by information collected from Center client/partner interviews. Recommendations for the types of social media outlets the Center should implement also were somewhat influenced by client/partner interview feedback, in addition to results from the environmental scanning of Center competitors, partners, and affiliates. It should be noted that my IMS team and I also referenced modern marketing/branding technologies and practices from several scholarly articles during Component #2 of the project (e.g., Etlinger & Li, 2011; Ogden & Starita, 2009; Evans & Wurster, 1999). These references, in addition to Component #1 research activity findings, helped our team gauge the most appropriate (e.g., industry-leading, yet cost- and time-effective, non-resource intensive, etc.) types of online or social media outlets and strategies to recommend to the Center. It should be noted that, as an employee with the Center, and based on my prior knowledge of the Center’s marketing/branding history and abilities, I provided additional guidance for final recommendations and project deliverables. A discussion of the two types of recommendations provided to the Center is offered below.

**Center Website Revision Recommendations**

Informal review of the Center’s online presence (i.e., their website) revealed issues with confusing navigation tab titles, text-heavy sections of information, little opportunity for user interaction, and no links or buttons for users to share information socially. Based on these findings, my IMS team and I recommended the following revisions for the Center’s website: Retitle main navigation tabs/headings; spell-out all acronyms mentioned on the site; optimize options for how users can contact the Center (e.g., include staff calendars or a Center events calendar and/or offer new options for contacting the Center about available services more prevalent on the site); use bullet-points for text-heavy sections
(e.g., specifically to list-out the Center’s available services); and, create links to more resources related
to proposals and/or evaluation and assessment information (e.g., a link specifically to Miami’s OARS
website).

**Center Social Media Recommendations**

In addition to website revisions, my IMS team and I also recommended that the Center begin to
implement (or use) a few new social media accounts as a means for expanding their online presence
and information sharing options. The five different types of SM we recommended included Facebook,
Google+, LinkedIn, SlideShare, and one other type of online information sharing tool (i.e., a Blog).

Based on references from IMS course literature, and our team’s understanding of the complexity
of each SM type, the above five SM types were up-to-date (i.e., industry leading) and seemed to be the
most feasible (e.g., cost- and time-effective) for the Center to implement and maintain as a small non-
profit business. Social media recommendations were influenced by results from environmental
scanning of Center competitors, partners, and affiliates, and correlated with feedback from several
participants during Center client/partner interviews. For instance, Facebook, Google+, LinkedIn, Slide
Share, and Blogs were among those SM types either most used or recommended for professional use
by Center partners/clients. Additionally, several of the SM types we recommended were currently
being used by other Center competitors/partners/affiliates (e.g., specifically Facebook, LinkedIn,
Blogs).

Also included in our marketing/branding redesign recommendations, was information on one
specific SM management tool (i.e., HooteSuite) which our team thought the Center could use in
managing their potentially new SM accounts. In our final deliverable (i.e., our *DBC Project* PowerPoint
presentation) we included a brief description of what HootSuite offers, key SM platforms that the tool
supports, a snapshot of an actual HootSuite management dashboard, and best practices and time
commitments for implementing this tool.

Of all of my internship projects, the *DBC Project* was, perhaps, the most pivotal and beneficial to
the Center. Research from Component #1 of the *DBC Project*, specifically from Center client/partner
interviews, provided information on the types of information valued by current/potential clients and
partners, as well as which digital venues (i.e., SM types) clients preferred for accessing and sharing
information. Research on the Center's online presence versus that of Center partners, competitors, and affiliates also provided valuable information about how other evaluation and assessment groups were marketing their own expertise and services online. Combined, findings from all data collection activities, as well as from DBC Project redesign recommendations have significantly impacted how the Center has approached their more recent marketing/branding strategies. See Chapters 3 and 4 for additional text describing the benefits of the DBC Project.

As mentioned prior, part of the outcomes of the DBC Project included follow-up work which I was able to complete during my internship. For this work, I re-examined and applied many of the research and marketing/branding strategy recommendations provided to the Center. Tasks or activities I completed during my MTSC internship as follow-up work to the DBC Project are described below.

**Follow-up Work from the Digital Branding Client (DBC) Project Completed During my Internship**

I completed three major tasks or activities during my internship as follow-up work resulting from DBC Project. The first of these tasks included re-examining information from my IMS 419/519 team’s final PowerPoint presentation. For this process, I went back and more thoroughly reviewed results from client/partner interviews, research findings regarding the online presence of Center competitors and partners, and the final recommendations which were provided to the Center for new marketing/branding strategies. During this task, I discussed DBC Project results with the E & A Director Dr. Woodruff, in order to make decisions about which marketing/branding recommendations might be most feasible and logical to implement first at the Center (based on current available staffing and resources). During our discussion, we brainstormed about how the format and content of the Center’s website could be enhanced and updated, and we chose two new marketing/branding tools to implement for the Center (e.g., Facebook, LinkedIn).

Secondly, I strategized about the necessary time and resources needed to develop new content on the Center’s website, and to create and develop new Facebook and LinkedIn accounts for the Center. For this task, I further researched HooteSuite in order to learn the best ways to build and share content, and how to manage each new SM account. To aid with plans for website revisions, I also revised one of the Center’s independent consultant contracts with a previous external web-specialist (Mr. Paul DeNu) to get additional assistance in applying future changes to and in enhancing the Center’s website.
After revisiting final deliverables from the *DBC Project*, and strategizing with the Center Director, the final follow-up task I completed during my internship included taking the preliminary steps needed to implement several of our newly targeted marketing/branding strategies. These steps included learning more information about options for activating and setting-up new Facebook and LinkedIn accounts for “groups” versus “companies;” meeting with various E & A Center staff to discuss their possible contributions in drafting new and updated text for the Center’s website, the Center’s bulletin board within McGuffey Hall, and the Center’s new SM accounts; and communicating with Mr. DeNu about possible content and format revisions to the Center’s website.

Due to my ongoing status as an employee with the Center, I can confirm that since the *DBC Project* and my internship, several new marketing/branding strategies have been either successfully enhanced or initiated by the E & A Center. Since 2012, this work has included: 1) creation of an E & A Center Facebook page, 2) begin steps to create an E & A Center LinkedIn group, 3) continuous updates to the content and format (e.g., revisions to text heavy sections on the website, distinctions of acronyms, etc.) of the E & A Center’s website, including the creation of new communication avenues for partners/clients (e.g., addition of a request for services form link/icon and a Facebook icon); and 4) updates to the E & A Center’s bulletin board space within Miami’s Department of Teacher Education in McGuffey Hall. Combined, all of these marketing efforts are poised to enhance both the reach and richness (Evans & Wurster, 1999) of the Center’s brand.

A complete discussion of findings and outcomes from the *DBC Project*, including additional information on the development of each of the project’s main components (e.g., data collection methods, analysis and coding of research data, implementation and ongoing efforts of several follow-up marketing/branding strategies at the Center, etc.) can be found throughout the remainder of this report (Chapters 3 and 4). Next, I briefly discuss one specific professional development activity I was able to pursue during my internship.

*Other Internship Activities*

As briefly mentioned in Chapter 1, in addition to completing several major projects for my internship, I also was able to pursue additional professional development (PD) opportunities. In particular, for one activity, I wrote a scholarship essay to the Grant Professionals Foundation (GPF). The purpose of the essay was to try and gain financial assistance to attend the Grant Professionals Association’s (GPA)
2012 Conference, in the Fall following my internship. I learned about the GPA from my Internship Writing Mentor, Ms. Amy Lamborg; however, my interest in attending the GPA’s Conference came from my ongoing personal and professional commitment to learning how to successfully write grant proposals, and in learning about the entire “genre system” of grant writing.\(^{10}\) My hope in attending the conference, was that I might have the opportunity to learn more about grant writing, beyond my current professional and academic experiences (e.g., via formal college courses, workshops, professional trainings, etc.). The second factor that influenced this PD activity came from my desire to find additional work similar to my previous internship experiences, since I had missed out on the opportunity to co-participate in grant writing with the E & A Center Director, (\textit{NSF ADVANCE Program Proposal}), and later, with the LTF Director (\textit{LTF North Face Proposal}).

That said, during the mid-to-late weeks of my internship, I reviewed submission guidelines and requirements, and with Dr. Woodruff’s support, I wrote, edited, and submitted a persuasive essay to the Grant Professionals Foundation (GPF) regarding why I was an ideal candidate for a scholarship award. In my essay, I highlighted my professional credentials in relation to those of past scholarship recipients, as well as discussed my experiences with grants and grant writing, to date, as they related to the GPA’s mission and initiatives. A few weeks following the submission of my essay, I received news that I was awarded a scholarship which helped cover the cost of my registration fee ($475.00) for attending the 2012 Grant Professionals Association (GPA) Conference.\(^{11}\)

In the remainder of Chapter 2, I discuss what I learned from my attendance at the GPA conference, but more importantly, I offer a comprehensive overview of the contributions of my internship projects to not only the E & A Center, but also my own personal and professional knowledge and skills.

\(^{10}\)By “genre system” I am referring to the following: legislation/policies influencing grant agency funding initiatives, request for proposals [RFPs], grant proposal writing and development, the proposal review process, post-award procedures, etc. My interest in these topics originally came from literature I read in several of my technical and grant proposal writing MTSC program courses (Tardy, 2003; Ding, 2008).

\(^{11}\) Also of note is an award of $325.00 which I was able to gain through Miami’s English Department GEEF funds, which also assisted in covering additional travel expenses for the conference.
Despite the ups-and-downs of my internship projects, the activities I completed during my internship, both directly and indirectly impacted the viability and mission of the E & A Center, as well as my own personal/professional skills.

In review, the E & A Center’s overall mission is to provide quality evaluation and assessment, research design, and proposal preparation services to clients, whether in tangible form (i.e., material products/deliverables) or intangible form (i.e., scholarly/expert advice or assistance). In addition, the Center’s viability is very much dependent on:

- How the Center is managed/led;
- The Center’s ongoing efforts to build relationships with current clients by providing quality services and valuable information;
- The Center’s persistence in gaining new clients and/or evaluation work (i.e., external grant funding); and
- The continued development of the expertise and skills of Center employees.

The Center achieves its mission, and continues to thrive through the efforts of its employees and through the Center Director’s dedication to situational and transformational leadership and management practices. As an intern with the Center during Summer 2012, I tried to align the purpose(s) behind each of my internship projects with the Center’s mission, as a means of productively contributing to their work efforts. In this final section of Chapter 2, I summarize the anticipated and unanticipated ways in which my internship work benefited or contributed to the Center as well as my own personal and professional knowledge and skills.

Contributions to Current Center Client Relationships and Potentially New Clients and/or Work

At any given time, the E & A Center maintains evaluation and assessment work for 20 to 25 externally funded projects. As such, the Center Director does not always have time, above and beyond completing project evaluations, to research future funding opportunities, to network with current and potential clients, or even to strategize about the Center’s marketing/branding practices. Through each of my internship projects, I was able to participate in various activities that supported these types of efforts at the Center; and essentially, the outcomes of my work either contributed to the Center’s
ability to strengthen relationships with current Center clients or it helped promote the Center as a means for prompting future work with potentially new clients.

From the NSF ADVANCE Program Research Project, I was able to provide the E & A Center Director with information regarding the availability of possible future funding sources, as well as pending changes to funding agency programs related to already established Center work. While an NSF ADV grant proposal was never pursued by the Center, following my internship, I was able to use resources I gained from this project (i.e., NSF's Weekly Digest Bulletin) to find a new funding source which the Center could instead pursue (i.e., NSF’s Promoting Research and Innovation in Methodologies for Evaluation [PRIME] Program). Of late, the Center is working toward potentially submitting a grant proposal to the NSF PRIME Program and has met several times to brainstorm and develop a research design for this grant proposal project.

Other possible funding leads for the Center were prompted through my work with the Learning Tree Farm (LTF) group. For this project, I was able to provide both tangible materials/products (i.e., a grant funding opportunity spreadsheet) to the LTF staff, and intangible assistance and advice (i.e., which funding agency the LTF should pursue a grant with). Through my pre-award services to the LTF, my hope was that the Center might potentially capitalize on post-award (e.g., evaluation services) work, should any of the LTF’s new grant proposals be funded. Even though work from the LTF project did not turn into a direct or immediate investment for the Center, several valuable resources resulted from the project, including two new electronic databases to use when searching for funding sources (i.e., Pivot.cos and Foundation Center Directory). These two resources are still referenced by the Center today and used to assist current clients.

My final project, the Digital Branding Client (DBC) Project was, perhaps, the most pivotal in providing the Center with information and recommendations on how to better build relationships with current clients (and potential clients), and on how to expand the reach and richness of their brand. Research from the DBC Project, specifically from Center client/partner interviews, provided insight regarding the types of information valued by clients and partners, as well as which digital venues they preferred for accessing such information. Research on several of the Center’s partners/competitors also provided valuable information about how other evaluation and assessment groups were marketing their own expertise and services online. As mentioned prior, these two sets of information have significantly impacted how the Center has approached their marketing/branding strategies. That is, since my
internship, the E & A Center has created a Facebook page and researched some information on creating a LinkedIn group, which has the potential to offer additional avenues for sharing and communicating information to clients, thereby helping to increase the reach of the Center’s brand. The Center also has made substantial updates to the content and format of their website, including a newly revised request for services function that enhances the richness of users’ experiences with such information, and helps facilitate the initial processes of communicating about available services. In sum, all of the marketing/branding changes influenced by the DBC Project have served to enhance the information exchange process with current clients and/or to attract new clients and new work. To date, the Center still uses information from the DBC Project to guide their marketing/branding practices.

Contributions to the Development of Center Expertise and Skills

As mentioned prior, several of my internship projects did not produce as substantive of contributions to the Center as I had hoped—that is, new funding via an NSF ADVANCE Program grant proposal award, or new work for the Center (i.e., via a contract for either pre- or post-award services) from the Grant Funding Opportunity Spreadsheet work with LTF staff. Originally, due to the limitations of each of these projects, I considered them somewhat unsuccessful merely because they did not produce the types of products or outcomes I initially anticipated. Upon further consideration and reflection though, I realized that the true successes from these projects were not what they contributed immediately to the Center, but what they contributed to my personal and professional knowledge and skills, which in a way still indirectly affects the Center through my continued employment there. To explain, I believe that I learned the following from my work on the NSF ADV Program Research Project:

> That workloads are influenced by a number of environmental factors (e.g., social, political, etc.) in the non-profit world, few of which can be directly controlled; and that non-profit work requires a person to be flexible in order to adapt to shifting timelines/deadlines.

Additionally, from my work on the Grant Funding Opportunity Spreadsheet with LTF, I learned:

> The necessary process for building relationships and possible collaborations with potential new clients; namely, that as a proposal planner and evaluator, sometimes relationships with clients are unpredictable; that collaborations with clients do not always go as planned; that clients can change their minds about what they want and when they want it at any point
during a project; and that it can be difficult to maintain a balance between the wants of clients with the actual needs/requirements of their work.

And from both of the above projects, I truly learned:

➢ How not to become disheartened or complacent if/when the direction of my work changes or fails; and ultimately, how to refocus and forge ahead to seek out new work when necessary.

One of the additional experiences I had hoped to gain from the NSF ADV and LTF projects was first-hand grant writing experience; however, because several aspects of each of these two internship projects fell through, I did not personally or professionally benefit in the ways I originally anticipated. With that said, during my internship, I was faced with the challenge of finding new work that could offer the experiences or opportunities I desired to expand my grant writing knowledge and skills.

Essentially, my GPF Essay was born out of the limitations of the NSF ADV and LTF projects, and in essence, this professional development activity turned out not only to be an investment in expanding my individual skills, but it also translated into a benefit for the Center as I have been able to apply knowledge gained from the GPA Conference during my continued employment as the Center’s Coordinator. This opportunity provided me with a venue in which I could directly network with other non-profit professionals, to learn more about various topics related to grant proposal writing, and to market and share information about the E & A Center’s history, expertise, and services. Several of the specific workshops/trainings I attended and the topics I learned about while attending the conference included: “Grant-writing: Craft or Commodity;” “Inside the Grant Review Process;” “Fundraising with Social Media;” and, “Logic Models: A grant Writer’s #1 Program Planning Tool.” Also, while at the conference, I participated in an awards ceremony for scholarship recipients; volunteered to assist with GPF’s silent auction activities, which fund future scholarship recipients; and networked with, and shared my E & A Center business card with a variety of professionals (e.g., GPF/GPA board members, other scholarship recipients, professionals from various non-profits across the US).

From my attendance at the conference, I gained knowledge about the “craft” of inventing proposal text. I also gained an inside view regarding how grants are reviewed, and I learned about specific strategies and tools for enhancing grant proposals (e.g., logic models). Attending the conference also provided me with a chance to pursue my own professional grant writing interests in ways I had not experienced before, outside of a formal classroom or work-setting, by networking with
a variety of professionals in the grant writing world. Not to mention, unlike circumstances with my NSF ADV research and the LTF funding guide project, my work on the GFP Essay actually did serve as a stepping stone for additional work. That is, following my internship and my attendance at the 2012 GPA Conference, I completed a follow-up narrative discussing my experiences while at the conference. My narrative was eventually published in GPA’s Spring 2013 eNewsletter, which not only added to my scholarly accomplishments, but also added to my list of credentials as a professional representing the Center. Appendix C includes my final GPF Essay, as well as a copy of my published GPA/GPF narrative. Also, as mentioned prior, my hope in attending the GPA Conference was so that I could gain first-hand experiences and become enculturated into the discourse community of fellow, professional grant writers (Ding, 2008). From this activity, not only did I gain new grant writing knowledge, I believe I also was successful at the following:

- Representing myself and the Center among other non-profit professionals, as well as networking with others professionals at academic events; and
- Marketing the E & A Center’s work and available services.

In sum, whether an indirect or a direct value to the Center or to my own personal and professional knowledge and skills, I believe that all my internship projects and experiences were successful and enriching in their own ways. In response to my performance during my internship, the E & A Center Director, Dr. Sarah Woodruff (also my Internship Supervisor) noted that what I considered to be “shortcomings” or limitations from several of my projects, instead, “symbolized my level of vested interest in what these projects meant to me personally, and as a developing professional.”

In Chapters 3 and 4 to follow, I summarize the development and impact of one specific internship project, the DBC Project, discussing ways in which the project was successful, ways it could have been executed differently, and the ways it continues to contribute to the Center’s marketing/branding efforts for strategic growth and development.
Chapter 3

Introduction

Of the work I completed during my internship, and during my participation in the MTSC Program, the Digital Branding Client (DBC) Project has contributed the most to the E & A Center’s viability. For this reason, in Chapter 3, I provide context and further details on how the DBC Project was developed and completed. Throughout the chapter, I describe the DBC Project’s objectives, activities, and findings. Additionally in this chapter, I discuss how the outcomes resulting from the project (i.e., client-specific research and marking/branding recommendations), have helped the E & A Center revise their communications, marketing, and branding strategies.

Context given in Chapter 3 also provides a segue into Chapter 4, which includes reflection on the successes and failures of the DBC Project with regard to ongoing advancement of the E & A Center’s communications, marketing, and branding strategies. Additionally, Chapter 4 discusses the significance of my participation in the MTSC Program over the past 5 years, how my technical communications knowledge and skills have evolved, and how my new skills have allowed me to become a better non-profit professional, in order to fulfill my responsibilities as an employee at the Center.

The first major section of Chapter 3 below provides detailed background information on the DBC Project, including context related to the Center’s marketing/branding efforts leading up to the project.

DBC Project Background

In order to gain an accurate understanding of why the DBC Project was developed, I would like to provide additional background information about how the Center’s communications and marketing strategies, and my role in completing such responsibilities, have evolved over the years.

A large majority of my responsibilities as an employee at Ohio’s Evaluation & Assessment Center (E & A Center), since I began there in 2008, have been devoted to developing and modernizing their marketing/branding strategies. The Center’s need to change their marketing/branding strategies came from several political and financial environmental changes which posed a threat to their financial stability. In addition, the Center also needed to re-align their marketing/branding efforts with 21st
century industry-lead practices. One major change the Center faced, beginning in 2008, was that the Ohio Board of Regents (OBR) announced they could no longer financially support the Center. This presented the Center with the challenge of how to supplement future funding in the absence of OBR money—that is, since the Center’s inception in 2003, the OBR had provided nearly $1.5 million dollars in funding support.

Fortunately, following their announcement of funding cuts, the OBR held a series of meetings in which their staff offered support to all Centers of Excellence affected by such changes. These meetings included brainstorming sessions in which the OBR provided resources to help each Center develop or revise their current communications and marketing strategies. The goal of this communications and marketing planning was to think about how, and through which outlets, each Center could communicate information about themselves and their services to help strengthen relationships with current clients, and possibly to attract new clients.

Prior to 2008, the E & A Center had not strategically thought about their communications and marketing practices. With that said, the OBR’s meetings and resources served the E & A Center well by jump-starting their efforts in purposefully thinking about new ways to market/brand their name, their skills, and the services they offered, as a means for gaining future funding and/or work.

As a result of the OBR’s meetings, the Center Director (Dr. Sarah Woodruff) and I produced a Communications and Marketing Plan that would serve as a major resource to the Center in later years. For the plan, Dr. Woodruff and I worked together to draft communications and marketing goals and objectives for the Center. Once goals and objectives were set, strategies and activities were crafted for how each objective could be met. Appendix D includes the Center’s full Communications and Marketing Plan from 2008, which included a set of five goals for future communications and marketing strategies. Table 1 highlights the five goals of the plan.

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12 With OBR’s seed-money in 2003, and annual funding from them thereafter, along with a sufficient amount of business and funding coming through word-of-mouth (WOM) referrals for projects, the Center was financially stable and did not need to actively market their work or services prior to 2008.
Table 1. OBR/E & A Center Communications and Marketing Plan Goals

<table>
<thead>
<tr>
<th>Goal 1</th>
<th>Goal 2</th>
<th>Goal 3</th>
<th>Goal 4</th>
<th>Goal 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase visibility of the Center and familiarize potential clients/collaborators with the Center’s purpose, significance, and services.</td>
<td>Provide current clients with resources/support to execute successful proposals/projects and understand the basics of assessment and evaluation.</td>
<td>Disseminate research/evaluation findings via scholarly and popular venues to enhance the professional knowledge base on STEM teaching/learning.</td>
<td>Serve as a resource to P-20 educators for improvement of STEM evaluation and assessment.</td>
<td>Increase collaboration/knowledge sharing among Ohio’s P-20 educators, PD providers, and informal math/science education groups.</td>
</tr>
</tbody>
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The plan also included information related to the following: target audience for each goal; a “key message” to share with the targeted audience related to each goal; intended outcomes for each goal; core strategies for reaching each goal; communications and marketing activities that could be implemented for reaching each goal; a 1-page description about the Center and its services; a collection of client testimonials about the Center’s services; and a list of 25 regional and national evaluation, assessment, and research partners, competitors, and affiliates.

**Background on E & A Center Marketing/Branding Efforts**

Between 2008 and 2010, as an employee for the Center, I used parts of the Center’s new Communications and Marketing Plan to develop and implement several new marketing resources for the Center. Specifically, I focused on following through with activities listed under Goals 1 and 2 of the communications and marketing plan, which dealt largely with increasing the visibility of the Center and providing clients with information to better understand evaluation and assessment and/or to assist in the successful completion of their projects. Activities for Goals 1 and 2 were most aligned with the skills I possessed at the time, and the responsibilities which were tied to my E & A Center job description. In review, Goals 1 and 2, specifically, included the following: Goal 1 - Increase the visibility of the E & A Center and familiarize potential clients and collaborators with the Center’s purpose, significance, and services; and Goal 2 - Provide current clients with resources and support needed to execute successful proposals and projects, as well as understand the fundamentals of assessment and evaluation.

Goals 3, 4, and 5 dealt with increasing collaboration and knowledge sharing among Ohio’s college and university faculty, P-12 educators, professional development providers, and informal mathematics...
and science education groups. As a side note, Goals 3-5 included activities which were more appropriate for the Center Director and Research Associates to carry-out, rather than myself, and included activities such as: disseminating or presenting project evaluation findings through scholarly publications and conferences; increasing collaboration and knowledge sharing among university faculty, P-12 educators, and informal math and science education groups; developing and implementing math and science education and evaluation and assessment professional development opportunities; promoting enrollment in higher education evaluation and assessment fields; and serving as catalysts for students (i.e., graduate assistants or doctoral fellows) working to earn degrees in science, math, or evaluation and assessment related fields.

Two of the activities I completed to meet Goals 1 and 2 included designing and disseminating new public relations (PR) materials, and revamping the E & A Center’s website to better serve users, to streamline communications with potential clients, and to highlight the Center’s past and current project work.

PR items included bookmarks and flash drives branded with the E & A Center’s logo. These PR items were chosen to serve as useful tools for the Center, as well as for Center clients. They also were targeted because they required little time and man-power to develop and disseminate. Flash drives were a versatile tool because the Center could disseminate final project evaluation reports to clients using them, and in turn, clients could use the flash-drives as they desired beyond the initial exchange of project report information. Also, because the E & A logo was printed on each flash-drive, they served as a means of marketing or brand-placement for the Center. My efforts researching and ordering the flash-drives included the following: Researching and conducting price-comparisons of flash-drives from 4-5 local PR companies (e.g., Apex, Glockel, Marco, Shumsky); choosing 4-5 samples of affordable, mid-grade (i.e., 2 GB of space and write-protection lock) flash-drives; sharing my research findings with the Center Director, who later helped me narrow down my results to one specific PR company and one flash-drive; and lastly, communicating with the targeted PR company to design (i.e., which color, style, font, quantity, etc.) and order flash-drives.

After flash-drives were ordered, I devoted time to developing a process for disseminating them. For current clients, I created a formal letter, signed by the Center Director, which thanked them for their business and explained the purpose and contents of the flash-drives (see Figure 4).
Figure 4. Formal letter included with E & A Center branded flash-drives.

Also, along with the flash-drives, I created an informal, business-card-sized compliments card which was attached to each flash-drive. See Figure 5 to view the compliments card and a sampling of the final E & A flash-drives. The note on the compliments card included the tag-line “With compliments…,” followed by our Center Director’s signature, and a note about the flash-drive write-protection mechanism on the side of the storage device. The flash-drive, letter, and note all included the E & A’s title or logo which further expanded the placement of the Center’s name and brand.

Figure 5. Compliments card and sample E & A Center branded flash-drives.
In addition to flash-drives, I also worked with staff from Miami’s print/design departments to create a set of bookmarks which could be disseminated as yet another tangible promotional item for the Center. Figure 6 displays a sample of one of the bookmarks. Since the Center worked with many different individuals in K-12 education, bookmarks seemed to be an appropriate and useful PR item to create and disseminate. The Center’s name/logo and web address were printed on the back of the bookmarks; while various pictures of students in the classroom, executing mathematics- or science-related activities were featured on the front of the bookmarks. A ruler pattern was added to one of the edges of the bookmarks to make them more functional and useful to teachers/students.

Figure 6. Sample E & A Center bookmark (front).

Over the years, blank flash-drives have been distributed not just to current clients, but also to potential clients. Venues for distribution include Miami University research and scholarship related events, such as Miami’s Office for the Advancement of Research and Scholarship (OARS) workshops, which host Miami faculty members writing grant proposals. Additionally, flash-drives have been shared with potential or new clients at local, regional, and national professional conferences and/or during initial project meetings and site visits. Bookmarks were only disseminated up to the beginning of 2010 because some of the information imprinted on them became out dated.

Between 2008 and 2010, I also revamped the E & A Center’s website; however this work was somewhat limited based on my knowledge of webpage development and of the program Dreamweaver. Website revisions that occurred during this timeframe were mostly completed with the assistance of graduate students from either design or engineering programs at Miami University. Early website revisions included updating the Center’s boilerplate text; updating the Center’s current and
past project descriptions; and the addition of a draft *Request for Services Form* which new clients could access and use to pursue Center services. Updating current and past project information was the Center’s way of highlighting the depth and breadth of work they were able to complete, and in recognizing the work of their current clients. The purpose of the *Request for Services Form* was to assist in the process for early communications between the Center and potential clients, and to possibly reduce last-minute requests for services. Prior to establishing the form, clients contacting the Center had very little idea of the types of information they needed to provide in order to efficiently request services. Additionally, at times, clients would contact the Center with seemingly unreasonable deadlines for their proposal or project work, which put the Center in an awkward position in which they sometimes had to turn down work due to time-constraints. That is, with over 20 active projects at any given time, it is not always easy for the Center to set aside current work in order to meet a demanding deadline for a new client.

As such, the new *Request for Services Form* was included on the E & A Center’s website (see Figure 7) and listed specific instructions for contacting the Center as well as the categories for potential clients to check-off or fill-in regarding information about their work (e.g., type of service being requested; funding agency name for their project; proposal or project work deadline; available budget for requested services, etc.). Acquiring this information during the initial stages of communications with potential clients helped the Center gauge whether or not their skills and expertise matched a particular client’s needs, and depending on the deadline of the work, whether or not the Center could provide the requested services in a timely manner.
Updates to the Center’s boilerplate text have been maintained well over time and are regularly referenced by Center staff or clients who are writing proposals; however, current and past project work descriptions are not currently updated on a regular basis due to a lack of time and personnel resources. As a result, this information on the Center’s website probably has not served the Center or its clients very well. Efforts are being made to revise and streamline the Center’s project descriptions so that this information does not have to be updated as often, or in as much detail, as it has in the past. The Request for Services Form is still active on the Center’s website today, and is quite often used by clients who are seeking the Center’s services (see Figure 8).
Based on my observations in managing completed Request for Services Forms, I believe that they have improved initial communications with potential clients, as well as curbed the number of last-minute requests the Center receives.

In the sections to follow, I discuss why and how the DBC Project was initiated, following the E & A Center’s prior communications and marketing practices between 2008 and 2010. I recap how the Center’s work with the OBR and several of my prior MTSC assignments influenced the development of the DBC Project; and in the process, I introduce several technical and organizational communications concepts which helped guide the design and development of the DBC Project. Discussions and concepts from this chapter are more thoroughly explained in Chapter 4 in relation to how the DBC Project was developed, and additional information on how the project contributed to modernization of the Center’s communications and marketing strategies, including successes and failures, and future directions of these new strategies is provided.

Figure 8. Snapshot of Request for Services Form function on E & A website.
DBC Project Purpose

Though the Center made strides between 2008 and 2010 to enhance their communications and marketing practices, they still needed to think more strategically about spreading their brand to a wider audience; that is, they needed to consider using 21st Century marketing to build a stronger presence online. Other than their website, the Center had no other type of digital marketing/branding in place. Basically, the Center lacked the knowledge and resources necessary for effectively navigating the Web, and for establishing additional online outlets through which they could share information with current or potential clients about Center services and the fields of evaluation and assessment.

Due to the Center’s lack of digital marketing/branding knowledge and resources, in 2011, as part of my COM 677 Independent Study course, I conducted an Organizational Case Study Analysis on the Center (See Appendix E). In my analysis, I examined the current structure, nature, and culture of the Center and recommended new strategies for how the Center could pursue strategic re-alignment as a means for adapting to the then environmental changes surrounding them (i.e., change or loss of funding, competition from other organizations, advances in industry-led marketing/branding tools).

Two specific recommendations that I provided in the case study were for the Center to revamp and modernize their marketing/branding strategies by further revising their website (e.g., by providing more informative evaluation and assessment resources, and/or more opportunities for interaction and sharing of such resources); and to consider creating new and additional social networking outlets (e.g., Facebook, LinkedIn, Google+) to share information. These recommendations were chosen based on my prior knowledge of the Center’s marketing/branding strategies, as an employee at the Center, as well as based on findings from early, informal research I conducted at the Center’s Coordinator related to how other similar educational evaluation and assessment groups were operating and/or strategically using the Web, for their own marketing/branding purposes.

Based on how I saw other similar organizations or groups representing themselves on the Web in comparison with the E & A Center (e.g., others had a wider presence on the Web across multiple marketing/branding outlets), I made recommendations in the final section of my case study analysis (i.e., Thinking Ahead: Possible Future Strategic Alignment) for how the Center could strategically market or brand themselves on the Web too. More specifically, I suggested that the Center utilize the Web as a professional online marketing tool to better connect with current clients and possibly reach a larger
audience of potential clients. Also, I suggested that the Center adopt an *Open-Systems (OS) Business Approach* in order to learn how to accurately adapt to the environmental changes going on around them. That is, in an open-systems business approach,

> . . . organizations do not exist as entities isolated from the rest of the world. Rather, [they] exist in increasingly turbulent environments that both provide inputs to the organization and receive outputs in the form of products and services. For a company to succeed, [it] must spend a significant amount of time engaged in environmental scanning, the careful monitoring of competitors, suppliers, government legislation, global economics, new technologies, political developments, and consumer preferences. Failure to do so leaves an organization open to unexpected environmental jolts, which can have disastrous consequences (Eisenberg, et al., 2009, p. 81).

The recommendations I made through my COM 677 course work were meant to help the Center expand the scope of their marketing/branding strategies in order to remain viable and to better compete within their industry. For a self-sustaining business like the E & A Center, being prepared to accurately react and adapt to changes going on around them could essentially help to ensure the sustainability of their business.

Unfortunately, though, my experiences in COM 677 did not provide me with specific knowledge on how to plan for, develop, and implement the new digital tools I was recommending. As a result, in an effort to expand my knowledge on digital marketing/branding, I took an *Interactive Media Studies (IMS) 419/519 Digital Branding* course as one of my final graduate electives in the MTSC Program. During the IMS course, I established the E & A Center as a client for one of the course’s major assignments—the *Digital Branding Client (DBC) Project*. The Center was a prime candidate for this project, merely based on the assignment’s requirements (i.e., to examine a client’s digital branding practices; conduct research to determine the performance of a client’s marketing/branding strategies; and report findings from research as well as provide client-specific recommendations for digital marketing/branding improvements). More specifically, as a client for the project, the E & A Center had the opportunity to receive detailed information, beyond what they already knew, regarding effective and modern-day marketing/branding strategies. In establishing the Center as a client, the purpose of the *DBC Project* became to provide the Center with information they might need to expand their current communications/marketing efforts. More specifically, the project had the potential to provide the following pieces of information:
- Summative information on what the Center’s current marketing/branding practices looked like, particularly in comparison with other similar organizations; and,
- Informed, research-based recommendations and methods (e.g., based on knowledge of up-to-date [e.g., industry-leading] digital marketing/branding practices, specifically for small businesses) for how the Center could revamp, expand, and modernize their marketing/branding strategies.

Details regarding the DBC Project’s initiation, goals, and design are offered next.

DBC Project Initiation

During the initial stages of the DBC Project a kick-off meeting was held during an IMS class meeting in order to introduce clients to the project. Two E & A Center staff members, their Center Director, Dr. Sarah Woodruff and their Senior Research Associate, Mr. Chris Cox attended the in-class meeting. Following the kick-off meeting, brief email and in-person communications between Dr. Woodruff, Mr. Cox, myself, and several of my IMS teammates occurred. During these communications, the following information was exchanged: the status of Center’s current marketing/branding strategies; the Center’s current marketing/branding goals (e.g., attracting new clients and new work; providing project information as well as evaluation, assessment, and educational resources to current clients; maintaining a professional image which highlights the Center’s reputation against its competitors); the types of additional marketing or branding practices that the Center envisioned being able to (realistically) implement within the next 1-5 years; the different types of research and data collection activities necessary during the DBC Project for my team and me to provide marketing/branding information and recommendations to the Center; and, suggestions and provisions for collecting project data.

After reviewing initial information provided by E & A Center staff, my IMS team and I were able to come up with an overall goal, design, and set of objectives for completing the DBC Project. The project’s major components, and the provisions and data collection methods and activities used to complete the project are discussed in the sections that follow.
At the time of the DBC Project, the Center was still striving to increase the visibility of their work and their brand; to familiarize prospective clients and collaborators with the Center’s purpose, significance and services; and to provide current clients with resources and support, as well as, knowledge of evaluation and assessment that could assist them in the successful completion of their work (i.e., Goals 1 and 2 of the Center’s OBR-influenced communications plan). Unfortunately, in their efforts to meet these goals over the years, the Center had not yet extensively utilized the Web or even social media outlets to communicate or share information. As mentioned prior, limitations in the Center’s digital marketing/branding efforts came from time constraints, a lack of resources and personnel, and a lack of knowledge on exactly how they should improve or expand the status of their name/brand online.

As a result of the Center’s marketing/branding limitations, the overarching goal of the DBC Project was to provide the Center with the information it needed to more extensively, and appropriately, use either the Web, social media, or other relatable online resources as part of their overall marketing/branding strategies. My IMS team’s hope was that the DBC Project might also assist the Center in meeting the original goal in their OBR-influenced communications/marketing plan, which was to implement the necessary communications-related tools and resources for gaining supplemental sources of revenue and work to help sustain the Center.

To reach the goal of the DBC Project, and meet our client-based assignment’s requirements, my IMS team and I recognized that the project would need to be multi-faceted. First, we knew we needed to collect several types of information on the Center, on Center clients and/or partners, and on other evaluation and assessment groups like the Center. As a result, the first component of the DBC Project was focused on research related to the Center’s online presence and marketing strategies, including investigating how such strategies were viewed by Center partners/clients. Additionally, as a
comparison, my team also wanted to investigate the marketing/branding strategies of several of the Center's competitors.

The second component of the project was built off the first component, in that, my IMS team used findings from project research, along with additional information gleaned from IMS course scholarly marketing/branding literature, to provide informed marketing/branding recommendations to the Center. Recommendations were to include information on how the Center could strategically and systematically improve or enhance the quality and relevance of information they were already sharing online, as well as new practices they could implement related to accessing more (and new) marketing/branding resources and tools on the Web, in order to further spreading their brand or name and attract new clients/work.

Once the main components (i.e., research and recommendations) of the DBC Project were developed, the team shared our plan with E & A staff. After some review, Dr. Woodruff and Mr. Cox approved the project's plan, but also provided suggestions and provisions for how to collect and report data for the project. Provisions provided by E & A staff are discussed in more depth in the sections that follow, which cover DBC Project objectives, and the methods and activities used for conducting research and providing marketing/branding information and recommendations to the Center.

DBC Project Objectives & Development

Before developing objectives for the DBC Project, my IMS team and I further communicated with E & A Center staff to learn more about their exact marketing/branding needs and goals, the resources they had available for eventually implementing new marketing/branding techniques over the course of the next 1-5 years, and the types of information they felt were most important to share with current and potential clients via their marketing/branding outlets. As a result, objectives were not only based on the project’s overall goal, but also were influenced by what the team learned about the E & A Center’s marketing/branding needs, resources, and information-sharing preferences.
**DBC Project Objectives**

DBC Project objectives included the following:

- Gaining an in-depth perspective on the E & A Center’s current status on the Web;
- Learning about the Center’s current marketing/branding practices and strategies, and how such strategies were (or were not) influencing or serving Center clients;
- Learning about other evaluation and assessment organizations’ positions on the Web, and how these groups were using online marketing/branding in comparison to the Center;
- Researching new and appropriate (i.e., industry-led, modern-day, cost-effective and time-effective, non-resource intensive, etc.) types of online or social media outlets and strategies to recommend to the Center;
- Researching methods and tools that could assist the Center in implementing new online or social media strategies; and
- Reporting findings from research and providing recommendations to the Center for how to revamp and modernize their current marketing/branding strategies.

The research and data collection activities completed in order to help reach the DBC Project’s six objectives are outlined in the sections that follow.

**DBC Project Development**

In order to plan activities for, and carry-out the DBC Project’s main objectives, my IMS team and I referenced several marketing, branding, and organizational business concepts. Marketing/branding concepts referenced during the project’s development came from IMS 419/519 course literature which focused on how businesses can engage in competitive virtual commerce. My IMS team and I referenced this concept because it related, specifically, to the idea of businesses or organizations increasing the reach and richness of their brand/name by competitively navigating and/or utilizing the Web (Evans & Wurster, 1999). As a reference, according to Philip Evans and Thomas Wurster, reach deals with the navigational dimension of “access and connection” online and represents “the most visible difference [and] primary competitive differentiator” between “electronic and physical businesses.” While, richness is the “depth and detail of information that [a] business can give [to] the customer” and represents the
dimension which “holds enormous potential for building close relationships with customers” (p. 87). Examining these concepts, in relation to the E & A Center’s marketing/branding practices, seemed appropriate as they aligned well with Goals 1 and 2 of the Center’s previously established communications and marketing planning (i.e., Goal 1 - increase visibility; Goal 2 - enhance information sharing with clients).

Other concepts, related to how the Center could expand and enhance their online status/brand, also were referenced in order to guide *DBC Project* recommendations. Specifically, my IMS team and I examined the organizational business concept of *environmental scanning* which involves the process of paying attention to what is going on in a particular organization’s or businesses’ industry (Eisenberg et al., 2009). Researching and providing information on how other similar organizations were marketing themselves on the Web, in comparison to the E & A Center, was the IMS team’s way of providing the Center with knowledge on how to stay competitive in their field(s), essentially through the implementation of new and/or revised marketing/branding strategies.

When considering the types of marketing/branding recommendations to provide to the Center, our team not only referenced research findings from the project, we also reviewed several scholarly articles related to industry-leading marketing/branding technologies and practices (e.g., Etlinger & Li, 2011; Ogden & Starita, 2009; Evans & Wurster, 1999). These additional references helped the team gauge the most appropriate (e.g., modern-day, cost- and time-effective, non-resource intensive, etc.) types of online or social media outlets and strategies to recommend to the Center as part of the project’s final presentation.

Methods, including the activities used to reach project objectives, as well as results from *DBC Project* research and final marketing/branding recommendations are discussed in more depth throughout the remainder of Chapter 3.

*DBC Project Research and Data Collection Methods, Activities, & Findings*

Overall, the research methods used and activities completed during the *DBC Project* were intended to help reach each of the project’s overall objectives. As mentioned prior, objectives for the project were influenced by IMS course/project requirements; marketing/branding information, guidance, and provisions provided by E & A staff during the project’s initial development; concepts from IMS (or
COM 677) literature; and the overall goal of the project, which was to provide information that could help expand and enhance the Center’s marketing/branding practices.

It should be noted that during the course of the DBC Project, I also applied some of my professional data collection and analysis knowledge to help guide several of the major research components of the project. The basis of my knowledge came from similar qualitative data collection experiences for projects which I completed as an employee at the Center. Also, during the recommendations component of the project, I helped guide final recommendations and project deliverables, based on my prior knowledge of the Center’s marketing/branding history, and ongoing marketing/branding abilities.

To follow, a more detailed explanation of the research and data collection methods and activities conducted during the DBC Project is provided. Findings from each type of research also are reported, and linked to the final marketing/branding recommendations provided to the Center. Information is organized by each of the four types of research that were conducted by our IMS team in order to complete the DBC Project. Again, this research included collecting information about the following: the status and influence of the Center’s current online presence versus that of their partners, competitors, and affiliates; and feedback from E & A Center clients/partners regarding the Center’s current marketing/branding efforts, to date.

*DBC Project Research Activity #1: Collecting Information on the Center’s Current Online Presence*

The first type of research conducted for the DBC Project was intended to collect information on the Center’s current online status. In detail, my IMS team and I wanted to learn more about the types of online marketing and branding already being used by the Center, and how Center clients were (or were not) influenced by such practices. Additionally, we wanted to gauge whether or not the Center’s current marketing strategies and resources were (or were not) helping them meet their marketing/branding goals. As mentioned prior, at the time of the DBC Project, these goals were still influenced by the Center’s OBR-originated Communications Plan and included: attracting new clients and new work; providing project information as well as evaluation, assessment, and educational resources to current clients; and, maintaining a professional image which highlights the Center’s reputation against its competitors.
Data Collection Methods for Research Activity #1

In order to collect information about the Center’s overall online marketing/branding status and influence, my team and I performed our own informal assessment of the format and content of Center’s current online marketing/branding presence (i.e., their website).

In order to conduct our assessment of the Center’s website my IMS team and I referenced Forrester Research Inc.’s Website Brand Action Review 3.0 Scorecard, (Rogowski, 2010) which was a resource that came from IMS course literature. The scorecard is a tool created by Forrester Research Inc., a research and advisory group who provides business and technology information tools to assist professionals in measuring and improving the status of their current strategic marketing/branding efforts. In all, the scorecard contains eight criteria with which to examine or assess a website. Each criterion includes an overall question related to the specific area being measured (e.g., menu/sub-menu category clarity, site performance, etc.). On the scorecard, a criterion related to each question can be assigned a score ranging from -2 to +2. A -2 represents a “strong fail” (i.e., two or more major problems, or one major problem and several minor problems related to a criteria); while, a +2 represents a “strong pass” (i.e., evidence of exemplary/best practice related to a criteria). Figure 9 shows a brief snapshot of an example criterion question from the scorecard (See Appendix F for a complete copy of the scorecard).

![Figure 9. Snapshot of criterion questions from Forrester Research Inc.’s Website Brand Action Review 3.0 Scorecard, IMS 419/519, DBC Project.](image)

For our assessment of the Center’s website, my team and I focused primarily on examining the layout of each web page, the clarity of content on each page, and any available interactive functions of
the website—all important elements of a modern, well-designed website. As a result, we mostly referenced Criterion Questions 3-8 from the scorecard. Other criteria (Criteria Questions 1-2) on the scorecard dealt with how the website supported users’ end goals. These criteria did not seem as useful for this particular research component or for measuring the usability and influence of the Center’s current marketing/branding practices (i.e., via their website). Measuring usability of the Center’s website did come into play during a later research activity—this part of the DBC Project is discussed later in Chapter 3.

During our assessment of the Center’s website, my IMS team and I collectively observed and examined each of the Center’s website pages, looking for answers to the following 6 criteria/questions:

1. Are menu category and subcategory names clear and mutually exclusive;
2. Does site content use language that’s easy to understand;
3. Does the site use graphics, icons, and symbols that are easy to understand;
4. Is text legible;
5. Are interactive elements easily recognizable; and
6. Does the site perform well?

Since our assessment was somewhat informal, as we viewed each webpage, we merely summarized what we observed into a list of overall strengths and weaknesses, rather than assign a particular score to each criteria/question. Findings from this data collection activity are provided in the next section.

**Findings from Research Activity #1**

After examining the Center’s current digital marketing/branding practices, my IMS team and I realized that other than their website, the E & A Center had no other online presence. Several strengths and weaknesses of the Center’s website were noted however. Overall, the site performed very well; for example, the main homepage downloaded within a reasonable amount of time, upon entering the site. Additionally, hyperlinks listed on each of the sites various pages were easily identifiable, as well as up-to-date and active. For the most part, the format of the website was fairly clean and included a simple layout with six separate pages (e.g., Services; Projects, Papers and Presentations; Staff; Resources; and Contact and Location). Lastly, graphics used on the site also downloaded quickly, and seemed
appropriate in relation to the content of the website (e.g., Miami’s logo, photos of Center staff members, teachers/students in classrooms).

Weaknesses of the site included: Somewhat poor or confusing names for some of the site’s navigation tabs (e.g., use of titles such as “Projects” and “Resources” was somewhat vague); and though language on the site was relatively easy to understand, some pages referenced confusing abbreviations or acronyms that non-evaluation or non-education related users might not understand (e.g., “ODE,” “NSF,” “ADVANCE,” etc.). Other content clarity issues were that several of the website’s pages (e.g., “Services” and “Projects and Presentations”) included text-heavy sections of information (i.e., long paragraphs, rather than brief, web-friendly text). Lastly, there was little-to-no opportunity for users to interact with the site’s content (e.g., there were no links/buttons to download information from the site or to share it socially; and other than links to Center staff email addresses, there was no other way for users to digitally interact with Center representatives).

In addition to our analysis of the Center’s website, my IMS team and I also focused on collecting three other types of information that could be used to guide recommendations for the Center’s marketing/branding strategies. Additional types of research are discussed throughout the next few sections and include interviews to help gauge the influence of Center marketing/branding strategies on clients/partners; an investigation of the online presence of several of the Center’s partners/competitors; and a deeper assessment of the Center’s website, particularly looking at how users interact with the website and the types of digital information that would be most helpful to them.

**DBC Project Research Activity #2: Collecting Information from E & A Center Clients/Partners**

The second type of research my team and I conducted was intended to help gauge how the Center was using their current marketing/branding resources (digital and non-digital) to interact with or serve current and potential clients. We also wanted to gauge if the Center’s marketing/branding efforts were helping to build stronger relationships with current clients, and how they might also be supporting new or fairly new relationships with clients.
Data Collection Methods for Research Activity #2

In order to collect information about the Center’s current marketing/branding efforts, in relation to its influence on clients/partners, my IMS team and I conducted interviews with a variety of Center contacts. It should be noted that work for this research activity was completed by only one-half of my IMS team; this group included me and two other IMS group members.

Before interviews were conducted, my teammates and I communicated via email with Dr. Woodruff and Mr. Cox, in order to compile a list of the most appropriate persons to contact for the interviews. A Google-Doc Excel spreadsheet was used as a way of organizing and sharing final client/partner information. The final spreadsheet included 10 total contacts, (2 potential clients, 3 loyal clients, 4 fairly new clients, and 1 Center partner) listing each person’s name and contact information. We included participants with different demographics, with the assumption that each type of participant might provide unique feedback based on the status of their relationships with the Center.

After the contact list was finalized, my IMS team and I turned our focus toward developing questions for the interviews. Because Center relationships with clients versus partners differed slightly (e.g., the Center shared work with partners, while they mostly just provided external proposal or evaluation services to clients) two different interview protocols were designed to collect information. Differences in the protocols were minor, mostly interchanging the label of “client” with “partner” when necessary. Each interview protocol consisted of 10 open-ended questions asking participants about their experiences, perceptions, and preferences related to the Center’s communications/marketing strategies. Interview protocol questions were designed to gain insights from Center partners/clients regarding the following: their initial interactions with the E & A Center; their preferred method of professional communication; their current purpose for and frequency of social media use; their likelihood to interact with E & A via social media; and their expectations and recommendations for content on the E & A’s website and potential social media space(s).

As mentioned prior, from this research activity, my team hoped to learn the following: how others viewed the Centers marketing/branding practices; how such practices might be affecting the Center’s relationships with clients/partners; and which types of information, as well as resource development and sharing recommendations, Center clients/partners might have for enhancing the Center’s online
presence. Figure 10 provides a snap-shot of an interview protocol, including examples of some of the specific questions asked during interviews.

![Interview Protocol](image)

*Figure 10. E & A Center partner/client interview questions, IMS 419/519, DBC Project.*

As a courtesy to participants, a short piece of text was included at the beginning of each protocol, which was approved by E & A Center staff, and reviewed by the interviewer prior to beginning each interview. This text thanked participants for their time; explained the anticipated length of the interview; asked participants for their verbal consent in recording interviews, to assist in accurate record keeping; and assured participants of the confidentiality of their responses going forth (see Figure 11). It should, again, be noted that International Review Board (IRB) approval was not required for this data collection activity, as none of the interview findings were to be reported or shared beyond our IMS team and Center employees. Following the introductory protocol text, an additional description of the purpose of the interview was explained by the interviewer, prior to asking interview Question #1 and so on.
“Thank you for taking the time to talk with us today. This interview should take no longer than 30 minutes. We would like to digitally record this interview so that we can focus on our conversation while having an accurate record of what we discussed. Your responses will be kept confidential and will not be used in any formal publications. Do you have any questions before we get started?

“If you agree to participate in this interview, at this point we would like to turn the digital voice recorder on in order to gain standard verbal consent of participation.”

<Turn recorder on.>

“Do we have your permission to use your confidential responses as data for our group’s project in our IMS 419/519 Digital Branding course?”

<Interviewee responds.>

“And do we have your permission to audio record this interview?”

<Interviewee responds.>

Figure 11. Introductory interview protocol text, IMS 419/519, DBC Project.

Per Center staff provisions, most interviews were conducted over the phone and limited to 30 minutes as a way of being mindful of participants’ busy schedules. Some participants could not be reached by phone, due to scheduling conflicts, so these individuals offered to provide feedback to interview questions via email. For those who granted permission, their interviews were digitally recorded. Notes were kept by the interviewee during all interviews, as a means for reviewing participants’ feedback later in the project.13

Following the interviews, audio recordings were transcribed by each interviewer (i.e., group member). These texts, along with other notes and/or email responses from interviews were collectively added into one GoogleDoc file to assist with the storing, organizing, and sharing of information from interviews. Feedback from all respondents was combined by interview protocol question, and responses were color-coded to differentiate between respondents (i.e., partners vs. clients). Differentiations were maintained so that during the beginning stages of analysis, the group could determine if there were differences in responses based on participant type. No significant differences in feedback, by participant type, were identified. As a result, my group members and I re-

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13 I conducted 3 of the 6 interviews completed; while my other group members completed the remainder of the interviews.
analyzed responses as a whole for each protocol question. The method of analysis we used when reviewing interviewee feedback was a somewhat informal version of the constant comparative method (Creswell, 2013). This was a method that I was familiar with based on my former work experience as an employee at the E & A Center. The constant comparative method is a common method of qualitative data analysis which involves iterative review of a set of data in order to look for patterns and/or notable differences and similarities. My IMS team and I used this method in hopes of finding potentially common or repeated themes among interviewee feedback. Any common or repeated themes from interviews could be used later as confirmation for the recommendations our IMS team might provide to the Center during later stages of the DBC Project. Findings from Center client/partner interviews are provided hereafter.

Findings from Research Activity #2

Of the 10 Center partners/clients contacted, a total of 6 either participated in interviews or provided responses to interview questions via email. The additional 4 contacts were unable to participate, due to heavy workloads and/or unavailability at the time of the interviews. Of those interviewed, 2 were loyal clients, 1 was a fairly new client, 1 was a fairly new partner, and the final 2 were prospective clients. A summary of responses to each of the interview protocol question is provided below. Findings are reported by topic/theme, and do not necessarily appear in the order in which interview questions were asked.

Users’ preferred Methods/Avenues of Communication. The most preferred method of communication among participants and their co-workers, as well as the most preferred method of potential communication with the Center was email. Other commonly used methods of communication included Instant Messaging (IM), face-to-face meetings, Skype, and LinkedIn. All participants who were interviewed reported actively using some type of social media (SM) for either professional or personal reasons. The following types of SM were cited as being used most often by participants: Facebook, LinkedIn, Twitter, and Google Plus/Groups. Of these four types of SM, LinkedIn, Google Plus/Groups, and Twitter were used most by participants specifically for professional reasons. Other noteworthy online communications or information-sharing tools suggested for professional use by participants included Slideshare and Blogs.
Users’ Opinions of and Preferences for E & A Center Communications. The majority of participants agreed that it would be beneficial and useful to them and their work, if the Center enhanced its information sharing and communications-based tools (e.g., by providing an online chat function to their website, or by utilizing collaborative work tools such as Skype, Google Docs, and Dropbox, etc.). However, participants’ opinions were divided regarding the usefulness of an E & A Center online SM presence (e.g., via LinkedIn, Facebook, Twitter, etc.). Half of the respondents said that being able to access E & A Center information via some type of SM might be useful to their professional activities; while, others said that it would not be useful to them if the Center had a SM presence. One participant specifically stated that he/she only uses SM for private (personal) matters. Participants mentioned that the level of benefit in the Center and themselves using enhanced communications tools would probably depend on the type and nature of work being completed (i.e., is the work confidential, does the work require a quick turn-around, could the work be completed collaboratively, etc.); and that the usefulness of Center-related SM accounts would also depend on the specific tools being used and the types of information being conveyed via these tools.

Users’ Preferences for E & A Center Online Communications Content. When asked specifically what types of information they would expect the Center to share or make available via their website and/or different communications and SM outlets, interview participants cited the following: current information about potential funders; resources that assist on data analysis methods; relevant education or evaluation related studies, including papers and articles; possible grant opportunities; best practices and definitions related to education, evaluation, or assessment; an online chat function or services request section; and “share buttons” so people could easily re-share content. When asked whether or not interview participants would actually follow the Center on SM outlets (e.g., Facebook, LinkedIn, Twitter, or via a Blog) responses again were divided. Some respondents said they would follow the Center on Facebook, LinkedIn, or via a Blog; while others said they would not. Interestingly, and in contrast with responses regarding the types of SM used by participants, one area of agreement among respondents was that they would not follow Center information if it occurred on Twitter; no specific reasons were cited.

Users’ Reported Interaction with E & A Center Communications Content. In reference to how participants first heard about the E & A Center, several cited Word-of-Mouth (WOM) through colleagues; while several others said they heard about the Center through Miami University’s Office for the
Advancement of Research and Scholarship (OARS). Only one respondent mentioned the E & A Center website as their source for learning about the Center. In relation, participants cited that they did not engage with the Center’s website on a regular basis. This finding made sense considering several participants’ suggestions for adding an “online chat function,” which was already active on the Center’s website at the time of the interviews. Most participants reported referring to the website during initial communications only, particularly when seeking out the Center for assistance, or for quick fact-checking purposes (e.g., to check for a staff member’s name/contact information or for the name of a project).

Users’ Suggestions for Improvements to the E & A Center’s Website. Most participants did not comment on whether or not the Center’s website was easy to navigate, mostly because they had not recently interacted with the site. One participant, however, did notice changes to the website and stated that he/she “like[d] the branding and colors” and that the Center currently had a “much better website than before.” All participants provided some type of suggestion related to possible enhancements or improvements specifically for the website regardless of their lack of reported engagement with the site. One participant suggested revising wordy text on the Homepage and Services tabs. Several others suggested providing the following: a secure sign-in feature to access data from projects; personal staff calendars or a Center events calendar; an instrument or survey repository; project evaluation reports; and research studies, presentations, or publications related to education, evaluation, or assessment.

Additional Feedback from Users for Enhancement of E & A Center Communications Content. At the end of each interview, participants were given time to ask questions or to provide additional miscellaneous feedback. One participant provided additional recommendations for the types of communications-based tools he/she preferred; that is, he/she suggested that rather than using Skype for video conferencing, the Center should consider trying a higher-quality tool such as Adobe Video or WebEx. During another interview, an IMS team member asked about recommendations for websites that his/her interviewee preferred, or websites that had good user experience. The interviewee suggested the American Evaluation Association’s (AEA) website because it provided a plethora of valuable information related to the field of evaluation/assessment. Lastly, yet another participant provided valuable feedback regarding how the Center should begin using, as well as manage, their potential SM outlets:
“Don’t try to learn about all social media types; [and] make sure to only try to manage a few accounts. [Just] figure out what you want to do, or the service you want to make available to the community, then go and find the tool that can provide that service. Don’t waste your time trying to learn too much about all of the SM tools/programs … Slideshare is a good place to start and then share from there.”

Center client/partner interviews were successful in gaining valuable information about the influence of Center marketing/branding strategies on clients/partners. They also helped our IMS team gain a good sense of types of digital tools and information preferred by and deemed most helpful by Center clients/partners. However, my IMS team and I still wanted to conduct one other, major type of research which was to investigate the online presence of Center partners/competitors. Data collection activities related to this third type of research are discussed directly below.

Data from Research Activities #1 and #2 revealed that the Center needed a stronger/wider online presence; however, feedback from Center clients/partners was mixed. Based on initial findings from these two research activities, it was still a bit unclear just how we should recommend changes to the Center’s marketing/branding strategies. As such, further research (Research Activity #3) was conducted to learn how other, similar education/evaluation organizations were marketing themselves in comparison to the Center.

**DBC Project Research Activity #3: Collecting Information on Center Partners’/Competitors’/Affiliates’ Online Presence**

In order to assist the Center in creating a stronger presence by enhancing and building their “brand” online, my IMS team conducted research through *environmental scanning* to learn how other similar organizations might be marketing/branding themselves in comparison to the Center. By gauging how other similar organizations were representing themselves online, our team hoped to gain insights which would allow us to make informed recommendations to the Center on how to enhance and modernize their own marketing/branding efforts. More specifically, our hope was that if we provided the Center with fresh ideas for how to use their own website, as well as, to create content via potentially new communications-based tools (such as social media), such efforts might help the Center gain a competitive edge amongst others in their industry.
Data Collection Methods for Research Activity #3

In order to learn about the online/social media presence and current marketing strategies of other evaluation and assessment organizations, my IMS team and I decided to conduct environmental scanning. That is, we observed and informally assessed the online presence and marketing/branding activities (i.e., online accounts and content) of organizations within the same industry as the Center (i.e., evaluation, assessment, and educational research).

To begin the environmental scanning process, my team and I first came up with a list of the most pertinent competitor or partner organizations to research. To do this, we revisited a list of 25 regional and/or national evaluation and assessment research partners, competitors, and affiliates, which I was already familiar with from the Center’s prior, 2008-2010 OBR communications/marketing planning efforts. It should be noted that because of my employment at the Center, and my prior knowledge of their work, I helped play a major role in deciding which organizations my IMS team should research. That said, I worked on behalf of the team, with the assistance of Dr. Woodruff, to narrow down the list from 25 to 14 organizations to research. The purpose for narrowing down the list was to focus on those organizations whose work, types of services, and demographic of clientele most mirrored that of the Center. These types of organizations were most likely to be the ones whose work efforts might rival that of the Center, and therefore might possibly influence the livelihood and sustainability of the Center’s work. The list also was condensed, due to time restrictions for completing this part of the DBC Project.

Once narrowed down, I shared the final list of competitors, partners, and affiliates with my teammates via a GoogleDoc Excel spreadsheet. The spreadsheet arranged information by each organization’s name, including pertinent acronyms; geographical location; and (when possible) each organization’s website URL. A list of the final organizations researched during the project (and their geographical locations) can be found in Table 2.
Table 2. List of E & A Center Partners/Competitors/Affiliations for Research Activity #3, IMS 419/519, DBC Project

<table>
<thead>
<tr>
<th>E &amp; A Center Partners/Competitors/Affiliates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ohio Program Evaluators Group (OPEG), (located across Ohio)</td>
</tr>
<tr>
<td>Battelle for Kids, Columbus, OH</td>
</tr>
<tr>
<td>Evaluation Services Center, Cincinnati, OH</td>
</tr>
<tr>
<td>Community Research Partners, Columbus, OH</td>
</tr>
<tr>
<td>Scripps Gerontology Center, Oxford, OH</td>
</tr>
<tr>
<td>Voinovich School of Leadership &amp; Public Affairs, Columbus, OH</td>
</tr>
<tr>
<td>Censeo Group, LLC, Hinckley, OH</td>
</tr>
<tr>
<td>American Evaluation Associate (AEA), Fairhaven, MA</td>
</tr>
<tr>
<td>SAMPI, Kalamazoo, MI</td>
</tr>
<tr>
<td>Horizon Research Inc., Chapel Hill, NC</td>
</tr>
<tr>
<td>Westat, Rockville, MD</td>
</tr>
<tr>
<td>American Educational Research Assoc. (AERA), Washington, DC</td>
</tr>
<tr>
<td>Strategic Research Group, Columbus, OH</td>
</tr>
<tr>
<td>New Teacher Center, Santa Cruz, CA (headquarters)</td>
</tr>
</tbody>
</table>

As mentioned above, a total of 14 evaluation and assessment competitor and partner organizations were targeted for informal analysis.\(^\text{14}\) Research for this part of the project was divided up, as evenly as possible, amongst the majority of my IMS group members—this meant that no one person had to research more than 3-4 organizations. I researched the online/social media presence and marketing strategies (i.e., websites, Facebook pages, LinkedIn accounts, etc.) for 2 of the 14 targeted evaluation and assessment competitor and partner organizations; while the additional 12 organizations were divided amongst, and researched by other IMS team members.

Each person conducting research searched the Web, reviewing websites and/or social media accounts that might be active for each of their specific organizations. This task was intended to help the team learn about the online presence (i.e., marketing/branding activities and online content) of Center partners/competitors. No formal protocol was developed for reviewing the online presence of each of the 14 organizations; instead, my IMS team referred to a Social Media Client Benchmarking Template by the OTHER media group (Briggs, 2010). A snapshot of this template can be found in Figure 12. The template offers a framework for collecting data about the creation and status of an organization’s social media strategies. Specifically for the DBC Project, the template offered a check-list

\(^{14}\) As a side note, the total number of Center client/partner organizations reported in the final deliverable for the DBC Project was incorrect. The number represented in our team’s final presentation for this research component was 15; however, only 14 organizations were actually researched. This reporting error was not detected until later review of the project’s final deliverables.
of online communications-based tools and SM outlets to look for, for the businesses/organizations we were researching. A complete copy of the template is offered in Appendix G.

<table>
<thead>
<tr>
<th>Which of the following exist for the business or brand?</th>
<th>Presence</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td></td>
<td>The purpose here is to establish a benchmark for the work they have done to date in establishing a web and social media presence.</td>
</tr>
<tr>
<td>Campaign microsites</td>
<td></td>
<td>An effective way for example should be supported by other channels.</td>
</tr>
<tr>
<td>Separate blog or blogs</td>
<td></td>
<td>With over 250 social networks it is worth focusing at most on only the major players.</td>
</tr>
<tr>
<td>Facebook</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Twitter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Youtube</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instagram</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other social networks (list)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 12. Snapshot of the OTHER media group’s Social Media Client Benchmarking Template.

The benchmarking template also was helpful because it listed conditions to consider when analyzing each organization’s website or SM account. In general, each teammate conducted an overall analysis of each of their organizations, at their own discretion, gauging whether or not a particular website was noteworthy, or if a robust online presence (i.e., several SM accounts) existed. If either of these two circumstances existed, special attention was then given to learning more about the types of content used to populate that particular organization’s website or SM accounts. For this second level of analysis, the benchmarking template was referenced and specific conditions for deeper analysis included: gauging strengths and weaknesses of each organization’s current web presence (e.g., navigability and presentation of website content); the frequency of uploads/updates to the content of each organization’s websites and/or SM accounts; the availability of sharing or “follow us” options on each organization’s website/SM accounts; and the number of persons interacting with or exchanging content via each organization’s website/SM accounts.
My team-members and I continued to use Google Drive as a collaborative space for creating, storing, organizing, and sharing results from our research. Any important notes/results collected from the group’s online environmental scanning were added into a shared GoogleDoc Excel spreadsheet. Within the spreadsheet, each of the 14 organizations were listed in the far-left column; while the header row consisted of any of the specific types of possible online communications tools or SM outlets that our team found during analysis. It should be mentioned that since a few of our IMS team members did not participate in researching Center partner/competitor organizations, they instead, were selected to review the collective research findings provided by the rest of the team. Data were reviewed as a whole across all 14 organizations, and mostly reported by marketing/branding type (i.e., website, Facebook, Twitter, Blog). Items which were reported across the 14 organizations included the total number and types of active SM outlets being used. For each organization’s/business’ website, overall navigability and formatting ratings were reported. Information regarding which organization had the most significant presence for each type of SM; which organization had the most number of users or most user interaction for each type of SM; and which organizations most often updated the content on their SM outlets also were reported.

As mentioned prior, the level of analysis used to review each organization’s online presence was determined by each group member. As a result, information recorded from this research activity varied. Findings for this research component of the DBC Project are briefly summarized and provided below. A snapshot of the spreadsheet used to report findings can be found in Appendix H.

**Findings from Research Activity #3**

Overall, among the 14 partner/competitor organizations researched, the most widely used online communications or SM tools included: a website, a Facebook page, a Twitter account, and/or a company Blog. In sum, all 14 partner/competitor organizations had a website; 8 of 14 had a Facebook account; 4 of 14 had a Twitter account; and 3 of 14 maintained Blogs. Several noteworthy websites and/or SM accounts were reported across the 14 organizations; however, no single organization was rated as having a significant presence via more than one marketing/branding type.

Findings from notes/comments on each of the organization’s websites revealed that the majority of the 14 organization’s websites were not easily navigable. That is, very few organizations had
simplistic websites, which allowed users to find information quickly and/or easily (i.e., clear and mutually exclusive menu categories/names; easily understandable language/content; legible text and/or graphics, etc.). Also, very few organizations’ websites contained graphics or images in relation to the content posted on their websites. Again, our reviews focused on examining the layout of each organization’s/business’ web page, the clarity of content on each page, and any available interactive functions of the website—as we felt that these were all important elements of a modern, well-designed website. One organization, the American Educational Research Association (AERA), did have a stand-out website, using graphics/images effectively, as well as offering interactive components that connected users to content on the AERA’s multiple, active SM accounts.

Of the 8 organizations that had an active Facebook page, the American Evaluation Association (AEA) had the most significant online presence. This conclusion was based on the fact that they had over 2,250 likes on their FB page, including what seemed like daily updates to content, and a large number of users who actually were interacting with the content on their page.

Four of 14 organizations had a Twitter account; however, only the Community Research Partners group had a significant presence (e.g., 900 followers; daily updates to content, including success stories, scholarly articles, and “real-time” interactions with users). All other organizations with Twitter accounts were reported as only posting content or interacting with users roughly 2-3 times per week.

Of those organizations who had an active Blog, The Voinovich School had the strongest presence. They posted roughly four new blog entries per week (all with varying content/topics); and, their blog offered options for people to react to or comment on posts. Also, it was noted that most comments were from what seemed to be “satisfied” users, customers, or employees.

Other active communications or SM tools noted among the 14 organizations included a YouTube account (e.g., Voinovich School of Leadership & Public Affairs, New Teacher Center, and Battelle for Kids) and/or a LinkedIn account (i.e., Battelle for Kids). Due to the low number of organizations who used each of these marketing/branding types, further analysis or review was not conducted, nor were these findings reported in the final deliverable of the DBC Project regarding Center partner/competitor/affiliate research.

Aside from the three initial, major research activities of the DBC Project, one final data collection activity was added toward the end of the assignment. This activity involved collecting additional
information on the Center’s current online presence, and is discussed briefly in the section that follows.

Research Activity #4: Collecting Additional Information on the Center’s Current Online Presence

In order to better gauge the status of the Center’s current online presence, my IMS team and I decided to conduct additional research on their website. This final data collection activity for the DBC Project involved informal usability testing and was intended to help determine how the Center’s website was being used by, and how it might be affecting or influencing users (e.g., current and potential Center clients, Center partners, and education and evaluation professionals). As mentioned earlier, this research activity occurred toward the very end of the DBC Project; therefore, not as much time was devoted to designing and implementing this part of the project. Additionally, results from the usability testing were never analyzed by my IMS team nor were they used when making recommendations to the Center regarding changes to their marketing/branding strategies. Nevertheless, a final deliverable including data collected from usability testing was provided to the Center at the close of the DBC Project, and as a result, a short summary of the data collection methods for this activity is provided below.

Data Collection Methods for Research Activity #4

In order to conduct usability testing of the Center’s website, my team members and I collaboratively developed a set of tasks that could be performed which would help analyze how well and how quickly users could find specific information on the website. As with the team’s first research activity (i.e., informal analysis of the Center’s website) usability testing tasks were influenced by criteria on Forrester, Inc.’s (2010) Website Brand Action Review 3.0 Scorecard. Tasks were designed to measure the availability, accessibility, and clarity of content on the Center’s website.

Once performance tasks were developed, and approved by the IMS course instructor,\(^{15}\) our team had to come up with a set of participants to conduct the usability testing on. Unfortunately, in the

\(^{15}\) There were no provisions set by the E & A Center staff for developing or conducting the usability testing process for additional analysis of their website.
interest of time, rather than working with Center partners or clients, usability testing was conducted using students from our IMS course who were not a part of the *DBC Project*. In all, five students participated in the usability testing. These students were chosen by the IMS course instructor, and so the demographics of these individuals were not necessarily reflective of actual Center-related website users.

During usability testing, participants were asked to perform 11 different usability tasks on the E & A Center’s website. Participants’ performance during usability testing was timed and observed, and our notes were recorded regarding the outcomes (i.e., completion vs. non-completion) of tasks performed. During observations, special attention was given to gauge the level of ease or difficulty in performing each task. Work for this activity was divided amongst my IMS group members, with each person playing a different role during the testing process. For example, with each participant, one team member read aloud the tasks that were to be performed, while another person timed each task, and yet another person took notes on the participants’ overall comfort and ability in performing each task.

Again, time was limited for this final research activity; therefore, only one-half of an entire class period was devoted to actually conducting the usability testing. The final deliverable of this research activity is discussed below.

**Findings from Research Activity #4**

Once usability testing was completed, our team compiled notes from each user’s experience with the Center’s website into a GoogleDrive document. Information was organized by task and notes were color-coded to differentiate between the results of each participant. As part of the final deliverables for the *DBC Project*, my team downloaded our notes and provided a 5-page Word document to the Center containing raw data from the usability testing that was performed on their website. Usability testing questions and raw data results can be found in Appendix I.

Usability testing results have yet to be fully reviewed by me and other Center staff. However, the Center has held onto these results since completion of the *DBC Project*, with the intention of eventually reviewing them as a means for guiding future improvements to the Center’s website.
For the final section of Chapter 3, a description of the DBC Project’s final deliverables is offered, along with a summary of the marketing/branding redesign recommendations which were provided to the Center.

**DBC Project Deliverables, Redesign Recommendations, and Outcomes**

**DBC Project Deliverables**

The primary deliverable from the DBC Project was a formal 30-minute Power-point presentation which was delivered to E & A Center staff on one of the final days of our IMS course. This presentation included a summary of results from the DBC Project’s cumulative research activities as well as the marketing/branding recommendations suggested to the E & A Center by my IMS team.

More specifically, the power-point presentation included an overview of general information that reiterated our team’s understanding of the Center’s services, clientele, and current online presence, and a summary of results from background research and analyses. Findings from the team’s informal analysis of the Center’s online presence, from Center client/partner interviews, and from research on Center competitors’/partners’ online presence were included as part of this information. Redesign recommendations also were included in the presentation and consisted of information on how the E & A Center could revise their website, along with various types of social media (e.g., Facebook, Google+, LinkedIn, Slide Share, a Blog) that the Center could implement. For each type of SM recommended, the team also suggested best practices and overall time commitments for implementation as well as tips and tools that would be helpful to the Center in maintaining their new marketing/branding strategies. Recommendations resulting from the project are discussed further in the section that follows.

In addition to a formal PowerPoint presentation, my team also provided a 5-page document to the Center containing raw data from usability testing performed on the Center’s website. In review, usability testing of the E & A Center’s website included 11 different tasks which users (i.e., IMS classmates) were asked to complete on the Center’s website. These tasks were designed to reveal information about the availability, accessibility, and clarity of information on the E & A Center’s website.
Unfortunately, due to a lack of time in completing this portion of the *DBC Project*, information from this research activity was never analyzed, and only raw data and observation notes were reported and provided to the Center. Again, usability testing questions and a summary of usability testing results can be found in Appendix I.

A summary of the marketing/branding redesign recommendations portion of the *DBC Project* final presentation is discussed below.

*DBC Project Redesign Recommendations*

Perhaps the most beneficial outcome of the *DBC Project* was the marketing/branding redesign recommendations our team provided to the Center. This part of our final deliverable helped to mostly fulfill the overarching goal of the project, which was to provide the Center with information needed to more extensively, and appropriately use either the Web, social media, and other relatable online resources as part of their overall marketing/branding strategies.

In order to construct redesign recommendations for the Center, my team and I used information we collected and analyzed from various research activities conducted during the project. Recommendations for revisions to the Center’s website were guided, in large part, by findings from our team’s informal assessment of the Center’s online marketing/branding presence (Research Activity #1) as well as by information collected from Center client/partner interviews (Research Activity #3). Recommendations for the types of social media outlets the Center should implement also were somewhat influenced by client/partner interview feedback, in addition to results from the environmental scanning of Center competitors, partners, and affiliates (Research Activity #2). Several pieces of marketing/branding literature from our IMS 419/519 course, as well as from one of my prior MTSC courses (*ENG 507 Interactive Business Communications*), (Etlinger & Li, 2011; Ogden & Starita, 2009; Evans & Wurster, 1999) also helped guide recommendations. Using findings from our own research helped to ensure that our recommendations were client-specific; however, references from course literature also provided our team with information about the most up-to-date and feasible (e.g., cost- and time-effective) SM types the Center could implement. Overall, the marketing/branding recommendations and strategies we considered included those practiced by other Center clients/partners/competitors, as well as non-profits in general. Our team also tried to remain mindful
of recommending SM outlets, which once implemented, could provide the Center with a decent return on investment (ROI), and those that would not require too much time, resources, or man-power to manage.

**Overall Recommendations for Jump-Starting Marketing/Branding Revisions.** A set of action items and tasks, to assist the Center in jump-starting plans for changes to their online marketing/branding strategies, was provided first among our team’s redesign recommendations. This set of items came from a general team consensus regarding similar findings across several data collection activities completed during the DBC Project. As summarized in Table 3, overall redesign recommendation items included the following: building a stronger social media presence for the Center; making the Center’s website content more robust and shareable via other online (e.g., social media) spaces; enhancing the Center’s marketing connections with Miami’s Office for the Advancement of Research and Scholarship (OARS),\(^{16}\) offering a wider variety of communications avenues to clients (e.g., a more available request for services method or methods of learning about staff schedules or Center events); and simplifying the Center’s stream of communications by using some type of SM management tool. Also, as a helpful planning tool, our team provided additional information related to the projected level of priority, timeliness, resource requirement/commitment, deadline, and cost required for each action.

**Table 3. Suggested Revisions and Planning of Future E & A Center Branding/Marketing Strategies**

<table>
<thead>
<tr>
<th>Action</th>
<th>Tasks</th>
<th>Priority(^a)</th>
<th>Commitment(^b)</th>
<th>Deadline(^c)</th>
<th>Budget(^d)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build a social media (SM) presence</td>
<td>Develop SM presence on Facebook, LinkedIn, and Google+(^{17})</td>
<td>3</td>
<td>1</td>
<td>Immediate</td>
<td>$$</td>
</tr>
<tr>
<td>Make website content more shareable to social media spaces</td>
<td>Create share buttons for content between website and Facebook, LinkedIn, and Google+</td>
<td>2</td>
<td>1</td>
<td>Immediate</td>
<td>$</td>
</tr>
<tr>
<td>Enhance marketing connections w/ OARS</td>
<td>Revise the Center’s current presentation for OARS workshops; link E &amp; A website to OARS website and vice versa.</td>
<td>3</td>
<td>2</td>
<td>Immediate/Soon</td>
<td>$</td>
</tr>
</tbody>
</table>

---
\(^{16}\)This recommendation was more specific due to the fact that several interview participants (also Center clients) were not only affiliated with the E & A Center, but also employees at Miami University, so they were familiar with the University’s available proposal/project development resources.

\(^{17}\)As a side note, Twitter was not supposed to be included in the final list of social media recommendations which were presented to the Center. As such, data reported in Table 3 appears slightly different from what was included in the final DBC Project PowerPoint.
Table 3. *Continued.*

<table>
<thead>
<tr>
<th>Action</th>
<th>Tasks</th>
<th>Priority&lt;sup&gt;a&lt;/sup&gt;</th>
<th>Commitment&lt;sup&gt;b&lt;/sup&gt;</th>
<th>Deadline&lt;sup&gt;c&lt;/sup&gt;</th>
<th>Budget&lt;sup&gt;d&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offer a wider variety of communication avenues to clients</td>
<td>Mention on website that E &amp; A is familiar with a variety of online comm. tools and is willing to use them per client preferences; Offer more ways for clients to view current Center events, project products, etc.</td>
<td>2</td>
<td>1</td>
<td>Immediate/Soon</td>
<td>$</td>
</tr>
<tr>
<td>Simplify the Center’s frequency/complexity of communications via social media sites</td>
<td>Create a HooteSuite account for simplifying SM management</td>
<td>2</td>
<td>1</td>
<td>Immediate/Soon</td>
<td>$$</td>
</tr>
</tbody>
</table>

<sup>a</sup> 1 – low priority, no deadline; 2 – slight priority with other actions dependent on start-up; 3 – high priority, strong need for action exists

<sup>b</sup> 1 – little to no commitment required; 2 – minimal commitment required mostly for start-up; 3 – high commitment required for long-term sustainability

<sup>c</sup> take action within 3 – 5 years (No Rush); take action in 1 year (Soon); take action immediately (Immediate).

<sup>d</sup> $ – Little to no cost; $$ - minimal cost mostly for start-up; $$$ - high costs with long-term investment

Additional discussion during the *DBC Project* final presentation included more specific marketing/branding redesign recommendations, such as revisions to the Center’s website and five different types of SM which our IMS team thought best for the Center to implement.

*Recommendations for E & A Center Website Revisions.* As mentioned prior, recommendations for revisions to the Center’s website were guided by findings from our team’s informal assessment of the Center’s online marketing/branding presence, as well as feedback from Center client/partner interviews. Informal review of the Center’s online presence (i.e., their website) revealed issues with confusing navigation tab titles, text-heavy sections of information, little opportunity for user interaction, and no links or buttons for users to share information socially. Based on these findings, my IMS team and I recommended the following revisions for the Center’s website (see Figure 13): Retitle main navigation tabs/headings; spell-out all acronyms mentioned on the site; optimize options for how users can contact the Center (e.g., include staff calendars or a Center events calendar and/or make options for contacting the Center about available services more prevalent on the site); use bullet-points for text-heavy sections (e.g., specifically to list-out the Center’s available services); and create links to more resources related to proposals and/or evaluation and assessment information (e.g., a link specifically to Miami’s OARS website).
Figure 13. Snapshot of website revision recommendations from final DBC Project presentation.

Recommendations for the Center’s website also were supported by feedback from Center clients/partners during interviews, one of whom suggested that the Center “revise wordy text on their website” and several others who suggested, for example, that the Center provide the following information on their website and/or via other potential online communications tools: “current information about potential funders; possible grant opportunities;” “best practices and definitions related to education, evaluation, or assessment;” “share buttons’ so people can easily re-share content;” and “personal staff calendars or a Center events calendar.”

Recommendations for Using Social Media. In addition to website revisions, my IMS team and I also recommended that the Center begin to implement (or use) a few new social media accounts as a means for expanding their online presence and information sharing options. The five different types of SM we recommended included Facebook, Google+, LinkedIn, SlideShare, and some type of Online Community space or information-sharing tool (i.e., a Blog). Based on references from IMS course literature, and our team’s own understanding of the complexity of each SM type, these five SM types were up-to-date (i.e., industry leading) and seemed to be the most feasible (e.g., cost- and time-effective) for the Center to implement and maintain as a small non-profit business.

Again, social media recommendations were influenced mostly by results from environmental scanning of Center competitors, partners, and affiliates, but also correlated with feedback from several participants during Center client/partner interviews. For instance, Facebook, Google+, LinkedIn, Slide Share, and Blogs were among those SM types either most used or recommended for professional use.
by Center partners/clients. Additionally, several of the SM types we recommended were currently being used by other Center competitors/partners/affiliates (e.g., Facebook, LinkedIn, Blogs). It should be noted that though some Center partners/clients reported using Twitter for professional reasons, many responded during interviews that they would not follow Center information on Twitter. Also, even though several Center competitors were observed using Twitter, this specific SM type requires “on-demand” rather than daily or weekly interaction and updates, which would not match the Center’s limited time and resources for maintaining their SM accounts. As a result, use of Twitter was not recommended to the Center.

For each SM recommended, we provided the following information: our reasoning for recommending implementation of each SM type, a set of best practices for implementing and using each SM type, and the time and resources we thought necessary for managing each SM type. Figure 14 provides a sample of slides for one of the specific SM types recommended by our team.

![Facebook example](image)

*Figure 14. Sample slides related to Facebook recommendation from DBC Project presentation.*

At the end of our marketing/branding redesign recommendations, we provided information on one specific SM management tool (i.e., Hootsuite) we thought might help the Center in managing their potentially new SM accounts. Information for this part of the presentation included a brief
description of what HootSuite offers, key SM platforms that the tool supports, a snapshot of an actual
HootSuite management dashboard, and best practices and time commitments for implementing this
tool.

A summary of some of the ways the DBC Project has influenced the Center’s marketing/branding
efforts, to date, is provided in the next and final sections of this chapter.

DBC Project Outcomes

At the beginning of the DBC Project, my IMS team and I were hopeful that we would be able to
provide the Center with findings from client-based research, as well as marketing/branding redesign
recommendations, which could help prepare them to revise and enhance their marketing/branding
strategies. Given the final deliverables and outcomes of the project, we felt confident that the
information we provided mostly met this goal, and that if implemented, our redesign
recommendations would push the Center ahead in meeting several of their long-standing
marketing/branding goals which included attracting new clients and new work; providing project
information as well as evaluation, assessment, and educational resources to current clients; and,
maintaining a professional image and reputation among industry competitors.

Of all of my internship projects, the DBC Project has, perhaps, been the most pivotal and beneficial
to the Center. Research from the DBC Project, specifically from Center client/partner interviews,
provided information on the types of information valued by current/potential clients and partners as
well as which digital venues (i.e., SM types) clients preferred for accessing and sharing information.
Research on the Center’s online presence versus those of Center partners, competitors, and affiliates
also provided valuable information about how other evaluation and assessment groups were soliciting
their own services online. Combined, findings from these three data collection activities, as well as
DBC Project redesign recommendations have significantly impacted how the Center has approached
their current marketing/branding strategies.

Since my internship, the E & A Center has created a Facebook page and attempted to create a
LinkedIn group; these efforts have somewhat helped to increase the reach of the Center’s brand online.
The Center’s Facebook page remains active and currently includes 24 members. Nearly all Center staff
members have contributed to or shared content to the page; however, the Center is currently
considering additional methods for increasing the number of participants (e.g., attracting a larger and wider range of users) on the page as well as the frequency of updates/posts to the page (e.g., with a goal of posting information almost daily, rather than weekly or bi-weekly). Soon after implementation, the Center’s LinkedIn group page was temporarily disabled as neither I nor other Center staff had time to create content or build a substantial following for this particular SM account. Dr. Woodruff still feels this particular SM tool is suitable for professional use by Center employees; therefore, plans have been set to further research the most effective ways to use LinkedIn, as well as on how to reactivate and manage the Center’s LinkedIn page. The Center has not used SlideShare yet, for similar reasons related to issues in using LinkedIn. Google+, however, has been used among Center staff for collaborative creation of GoogleDocs, and with Center clients, mostly to assist with proposal information sharing and development processes.

In addition to beginning to use several new SM accounts, substantial updates also have been made to the content and format of the E & A Center’s website. These revisions have helped enhance the richness of users’ experiences on the website. For example, text heavy sections on the website have been revised to include bulleted lists which highlight some of the most important Center-related information for users; to the extent possible, acronyms have been spelled-out so that a wider audience of users can understand them; request for services information has been placed on multiple pages on the site, including use of a small graphic of the Center’s Request for Services Form which users can click on and interact with, and a Facebook icon has been added to the website homepage to direct users to the Center’s active Facebook page (See Figure 15).
Figure 15. Snapshot of several pages from the E & A Center’s current website.
Though the list of links to funding agencies, math and science education organizations, and evaluation and assessment resources has been supplemented, one area still under revision for the website includes the addition of tangible (shareable) resources related to each of these fields (e.g., project reports, academic articles, an instrument repository). Completing this particular revision has not been possible at the Center as it requires input and a significant amount of time, which essentially has been unavailable from other Center staff members. Though this revision has not been implemented yet, creating and sharing these types of content continues to be discussed during Center staff meetings.

As an employee still at the E & A Center, I can report that all of the Center’s marketing/branding efforts since the DBC Project have enriched the information exchange process between the Center and its current clients, aided in attracting new clients and new work, and helped facilitate the initial process for exchanging information regarding the Center’s available services. Outcomes and deliverables from the DBC Project continue to influence my work, and the work of other Center staff in developing their marketing/branding and strategic planning efforts.

In the fourth and final chapter of this report, I will examine and critique the strategies used in completing the DBC Project, look ahead to the possible challenges for fulfilling and sustaining additional marketing/branding efforts, and conclude this report by further discussing the implications of my internship work on my own skills as well as on the Center.
Chapter 4

Reflections on Using My MTSC Program and Internship Experiences with Online Marketing/Branding to Build Organization Sustainability for Ohio’s E & A Center

As mentioned in previous chapters, much of the development of the Digital Branding Client (DBC) Project was guided by knowledge and experiences I gained throughout my time in the MTSC Program. In this chapter, I further explain how technical and organizational communications concepts such as virtual commerce, open-systems business approach, and environmental scanning influenced the DBC Project’s design and outcomes. I begin the chapter by outlining the effects of one environmental change, in particular, on the Center’s organizational system and discuss how this change influenced the development of the DBC Project. Throughout, I also discuss how the outcomes of the project benefited or influenced the E & A Center’s marketing/branding strategies, including details about how the project could have been customized differently to more accurately meet the Center’s needs. I conclude Chapter 4 by reflecting on my internship experiences as a whole.

Brief Review of the E & A Center’s Organizational Structure Prior to the DBC Project

As a review, in 2008, the E & A Center experienced a major shift in financial stability. That is, the Ohio Board of Regents (OBR) announced that they would no-longer financially support the Center. As a result of this announcement, the Center needed to figure out additional strategies for attracting new clients and new work to compensate for their loss in funding. They used their situation as an opportunity to think more strategically, as well as proactively (rather than reactively) about the “health” and sustainment of the Center. Particularly, the Director, Dr. Woodruff, and her staff began to explore ways they could combat future circumstances or changes that might threaten their financial or organizational stability.

If we think about what it means to do something strategically or proactively, we often associate these actions as methods in planning for the future. According to E. Mark Hanson (2003), “strategic planning involves defining [an] organization’s mission and developing methods and strategies to achieve that mission in the most effective way possible” (p. 236). In this sense, Dr. Woodruff’s goal
in planning for the Center’s future was to effectively manage, and strategically reposition the Center so that she and her staff could be more self-sufficient as well as competitive within the field of evaluation and assessment. Achieving this status involved thinking about the types of “inputs” or investments the Center needed to make to their internal system in order to produce the particular “outputs” or outcomes they desired.

This is why, between 2008 and 2010, Dr. Woodruff and her staff examined the Center’s ongoing marketing/branding practices, and explored new approaches to their overall organizational structure and business model. Through collaborative examination and discussion, including guidance from my MTSC Program COM 677 Organizational Case Study Analysis, Dr. Woodruff reorganized the Center’s structure creating a more linear framework and adopted an active “open-systems” business approach to managing the Center. This change was intended to help Center staff in better managing current workloads. Additionally, the Center focused on “inputs” into their system such as expanding from word-of-mouth to online marketing/branding strategies, which began during early stages of improvements to the Center’s website. Hopeful “outputs” or outcomes of investing time and energy into the Center’s business and marketing/branding approaches were to improve and spread their brand to a wider audience in an effort to gain new clients/work. A visual representation of how OBR funding cuts prompted organizational change as well as affected the inputs and outputs of the Center’s internal system is shown in Figure 16.

<table>
<thead>
<tr>
<th>Environmental Change to the Center's System</th>
<th>Center's Reaction/Decision to Envir. Change</th>
<th>Input into the Center's System in response to Envir. Change</th>
<th>Output resulting from New Input into the Center's System</th>
<th>(Hopeful) Outcome of Input/Output Exchange for the Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loss in Funding Threatens to Jeopardize Center Sustainment</td>
<td>Examination of Center’s Organizational Structure/ Business Model</td>
<td>Enhance Center Marketing/Branding Practices (i.e., Expand from Word-of-Mouth Communications to improved Online Marketing)</td>
<td>The Center’s Brand is spread Across/Reaches a Larger Audience</td>
<td>The Center gains new clients and new work (i.e., new funding), making them more financially stable and competitive.</td>
</tr>
</tbody>
</table>

*Figure 16.* Example of how changes in Center funding affected the inputs and outputs of the E & A Center’s internal system.
As discussed in Chapter 3, part of the goal of the *DBC Project* was to provide the Center with knowledge, particularly beyond what they already knew, about how to enhance or revise their marketing/branding practices. In this sense, the *DBC Project* itself became a major contributor to the “input” and “output” process that was prompted by the Center following OBR funding cuts.

To follow, I discuss what it means for an organization to function within an “open-system” and explain the strategies the E & A Center employed before and after the *DBC Project* (i.e., virtual commerce, environmental scanning) as part of their ongoing efforts to better protect and sustain the Center’s viability.

*Overview of Open-Systems Business Approach & Environmental Scanning as Methods for Organizational Alignment and Strategic Planning*

The organizational structure or framework of any business is typically made up of several moving parts and pieces. Put another way, “an organization is structured by what might be thought of as an entire network of cycles that are interdependent, reinforcing, and together make up the whole system.” (Hanson, 2003, p. 115) When enough of the right parts or pieces are present, and all of these elements work well together within a stable environment, then the organization can for the most part function successfully. However, when a change (whether good or bad) is introduced, which influences a part of the system, the system’s functionality is consequently altered.

Prior to 2008, the Center had no major cause for concern regarding the sustainability of their business; likewise, they had no immediate reason to actively communicate or market their brand, or to seek ongoing funding. However, following OBR’s funding cuts, the Center’s internal system became compromised, and it now had a more pressing reason to examine the placement of their organization, and the context (e.g., external environment or network) in which they operated.

As also mentioned in Chapter 3, unfortunately (or fortunately, depending on the situation), organizations do not exist in isolation (Eisenberg et al., 2009); rather, they function as a part of a larger network where there are many external, environmental factors (e.g., social, political, financial, technological) that can either contribute to, or threaten the organization’s internals system and overall “health.” As explained by Hanson (2003):
An open system interacts with its environment by exchanging inputs and outputs in a patterned, cyclical fashion. The cycles of events that occur within the organization gravitate toward relatively constant input-output ratios, establishing a steady state, or equilibrium. The open systems tends to be self-regulating in the sense that when a disruption occurs in an event cycle, energy and resources are introduced at that point to reestablish the equilibrium. (p. 124-5).

Thus, when an organization functions as (or within) an open system, this means that they choose to pay particular attention to the environmental conditions and changes surrounding their organization in order to maintain an accurate balance of “inputs” and “outputs.” For the E & A Center, it made good sense for them to adopt an open-systems business approach as a strategic method for sustaining their organization. By choosing to pay more attention to potential changes surrounding their organization, they could essentially be better prepared to respond to, or adjust to, future changes that might upset the flow and function of their internal network.

One strategy for learning about what is going on outside of an organization is the use of environmental scanning. As defined by Eisenberg et al. (2009), this process involves “the careful monitoring of competitors, suppliers, government legislation, global economics, new technologies, political developments, and consumer preferences” (p. 81). A major benefit of practicing environmental scanning is that, often times, you can not only better react to impending changes, but also find out how other similar organizations (i.e., competitors) are functioning.

When the E & A Center first began examining the environment outside their organization, they paid attention mostly to legislative and political changes within the state- and federal-funding agencies programs that were providing funding to the Center’s projects. However, they also used this opportunity to examine how other organizations offering similar services were functioning. Early research by the Center (2008-2010) was somewhat informal, and it revealed that the overall number of organizations offering similar evaluation and assessment services as the Center was not alarming; however, Center staff did learn that for a number of the organizations they examined, several of them had fairly well-established online marketing presences. With this finding, the Center realized that in order to maintain an ample work-load, barring possible future funding cuts, it would be wise to invest in new and improved ways to market their brand, so that they could more
effectively maintain their mission and workload, spread their brand, and compete for new clients and work within their field.

Despite the Center’s early efforts to change their business and communications models, because of their small size, they often times are barely able to manage their workload, let alone consistently and strategically plan for what might lie ahead. Since the E & A Center’s time and resources are somewhat limited as a smaller non-profit organization, situating them as a client for several of my MTSC Program projects, including the DBC Project, was incredibly beneficial. In the sections to follow, I briefly recap how the DBC Project was developed in relation to the E & A Center’s organizational structure at the time of my IMS 419/519 course. I also explain how the project was designed to build upon the Center’s beginning environmental scanning efforts, how research conducted by my IMS team helped inform the Center’s future communications and marketing/branding practices, and pros and cons of the project’s design, in relation to its outcomes.

**Using Environmental Scanning to Inform the Digital Branding Client (DBC) Project Design**

Since Center staff had already started proactively paying attention to changes surrounding their organization, it made sense for my IMS team to develop the major components of DBC Project using the method of environmental scanning. However, as our team approached the design of the DBC Project, we wanted to be mindful of ways that our work could provide new and updated information to the Center, and on a larger scale, than previously examined. We wanted project outcomes to help accelerate the Center’s future marketing/branding efforts. Moreover, we were hopeful that our research and the marketing/branding recommendations we provided might act as additional inputs or investments into the Center’s “system” by contributing to their staff’s knowledge about marketing/branding strategies.

Based on our intentions for the DBC Project, and to help ensure that our data collection efforts would be beneficial to the Center, my IMS team and I asked ourselves two questions prior to conducting research: *What do we want to learn from our environmental scanning that the Center does not already know from prior communications/marketing planning; and, what types of information would be most beneficial to provide to the Center going forth?* We established that it would be most beneficial to the Center if we gained insight into how their current marketing/branding practices were functioning, particularly in
relation to their clients, as well as against their competitors. Once we established what we wanted to learn through our research, we then asked ourselves two additional questions regarding the process for collecting research and reporting our findings—these questions included: How best can we learn about the online presence of the Center in relationship to their clients and competitors; and, what can we do with the information we collect, in order to assist the Center in enhancing their future marketing/branding practices?

In order to answer the first three questions, and as part of the research component of the DBC Project, my IMS team and I conducted four different data collection activities. Our goal was to collect information that would help gauge the progress and effectiveness of the Center’s marketing/branding on current clients, to-date, and in comparison with other similar organizations. To address the fourth and final question, we used findings from our research to guide the recommendations component of the project.

In the next section, I reflect on the design of the DBC Project. Mostly, I focus on positive outcomes of data collection activities, while also discussing the misalignment of how several of our recommendations from the project which could have been better aligned in order to provide more appropriate and resourceful information, based on the Center’s organizational structure and needs as a non-profit. I also discuss challenges faced by the Center after implementation of several of their new marketing/branding strategies, and their projected next steps following this initial implementation stage. Moreover, I relate the Center’s current marketing/branding challenges to several new environmental changes, such as the issuing of new (2013 and beyond) branding requirements by Miami, and the merger of the E & A Center with its affiliate Center.

Reflection on the DBC Project’s Design and Outcomes

Before reflecting on the outcomes of the DBC Project, I would like to briefly recap findings from the project, in order to re-establish why our team recommended certain marketing/branding changes.

As discussed at length in Chapter 3, information gathered from DBC Project research activities revealed that the Center had a very minimal presence online. Feedback from interviews as well as findings from our team’s environmental scanning, also revealed that the Center’s current communication’s/marketing efforts were not necessarily facilitating stronger relationships with current clients/partners, nor were they adding to the Center’s competitiveness and its ability to
attract new clients/work. As a result of these findings, my IMS team and I provided the following recommendations for how we thought the Center could increase the reach and richness of their brand by expanding and enhancing their ongoing marketing/branding strategies. Recommendations included the following: revise and make website content more robust and shareable via other online (e.g., social media such as Facebook, LinkedIn, Blogs, etc.) spaces; enhance marketing connections with Miami’s Office for the Advancement of Research and Scholarship (OARS); offer a wider variety of communications avenues to clients (e.g., a more available request for services method or methods of learning about staff schedules or Center events); build a stronger social media presence for the Center; and simplify all online communications by using a SM management tool.

Overall, as an ongoing employee with the Center, I can say that the DBC Project’s outcomes were successful in contributing to the Center’s ability to enhance and expand their ongoing marketing/branding efforts. Thanks to the DBC Project’s research and recommendations, the E & A Center’s marketing and branding strategies have greatly evolved over the last few years. In general, slowly but surely, the Center has shifted from almost purely word-of-mouth marketing to strategies that involve communicating with and attracting new clients and work via their revised website as well as through other online resources.

In Table 4 to follow, I summarize the marketing/branding changes that the E & A Center has been able to make based on feedback from the DBC Project. Additionally, I highlight the benefits and challenges the Center has faced in enhancing, implementing, and maintaining these new marketing/branding practices.
<table>
<thead>
<tr>
<th>Enhanced or New Marketing/Branding Practice</th>
<th>Status of Practice</th>
<th>Benefits from Implementing Practice</th>
<th>Challenges from/following Implementing Practice</th>
</tr>
</thead>
</table>
| Revised/Reformatted Website              | Active w/Ongoing Revisions, but not yet Monitored | ✤ Enhances the *richness* of users’ experiences with content on the Center’s website.  
✱ Aids in attracting new clients and new work. | ✤ The ability to build and frequently update content remains challenging based on limited man-power/resources.  
✱ It is hard for the Center to effectively measure how much ROI is produced by the website at this point.  
✱ Additional research on using web analytics/metric methods, and on building and streamlining content creation is needed. |
| Revised Interactive Request for Services Form | Active and Ongoing, but not yet Monitored | ✤ Facilitates initial exchange of info with potential clients regarding the Center’s available services.  
✱ Aids in attracting new clients and new work. | ✤ It is hard for the Center to effectively measure how much ROI is produced by the form at this point.  
✱ Additional research on using web analytics/metric methods is needed. |
| Dept. of Teacher Education Bulletin Board | Created w/Ongoing, yet limited, Updates | ✤ Enriches Info exchange between the Center and Miami’s & College of EHS faculty/staff.  
✱ Allows the Center to market their work to Miami’s & College of EHS faculty/staff and campus visitors. | ✤ Creating and updating tangible marketing content (drafting, designing, reviewing, printing, etc.) can often be tedious.  
✱ It is hard for the Center to monitor whether there is any kind of ROI from this marketing outlet. |
| Facebook Page                            | Created w/Ongoing, yet limited, Updates | ✤ Enhances the *reach* of the Center’s work and services.  
✱ Provides an additional platform for info exchange between the Center and users of their FB page. | ✤ Ability to build and frequently update content remains challenging based on limited man-power/resources.  
✱ Additional research on attracting a larger audience and building and streamlining content creation is needed. |
Table 4. *Continued.*

<table>
<thead>
<tr>
<th>Enhanced or New Marketing/Branding Practice</th>
<th>Status of Practice</th>
<th>Benefits from Implementing Practice</th>
<th>Challenges from/following Implementing Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google+/Docs</td>
<td>❖ Active w/Ongoing Use</td>
<td>❖ Assists with collaborative content creation and management among Center staff.</td>
<td>❖ The only challenge encountered thus far is getting buy-in for use by Center clients who are unfamiliar with this application.</td>
</tr>
<tr>
<td>LinkedIn Group Account</td>
<td>❖ Created, but Revoked</td>
<td></td>
<td>❖ Ability to build and frequently update content remains challenging based on limited man-power/resources.</td>
</tr>
<tr>
<td>Slideshare Account</td>
<td>❖ Not yet created</td>
<td>❖ Additional Literature on possible benefits of use as a Non-profit is still being researched and reviewed.</td>
<td>❖ Additional research on attracting a larger audience and building and streamlining content creation is needed.</td>
</tr>
<tr>
<td>HooteSuite Account</td>
<td>❖ Further Researched, but not yet Created</td>
<td></td>
<td>❖ Additional research on how to use this application is needed.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>❖ Some versions of this application may not be cost-effective for the Center.</td>
</tr>
</tbody>
</table>


As mentioned in Table 4, since the *DBC Project*, the Center has made substantial updates to the content and format of their website. In more detail, text heavy sections have been revised to include bulleted lists which highlight some of the most important Center-related information for users; acronyms have been spelled-out so that a wider audience of users can understand them; request for services information has been placed on multiple pages on the site, including use of a small graphic of the Center’s *Request for Services Form* which users can click on and interact with; and a Facebook icon has been added to the website homepage to direct users to the Center’s active Facebook page. However, one area still under revision for the website includes the addition of tangible (shareable) educational and/or evaluation and assessment resources (e.g., project reports, academic articles, an instrument repository) mostly because this step requires input and a significant amount of (unavailable) time from Center staff members.

The Center also has created a Facebook page which remains active and currently includes 24 members. Center staff members have contributed to and shared content to the page; however, the Center still faces the challenge of frequently updating content and posting items to the page. The
Center has not been able to create or actively utilize LinkedIn or SlideShare, particularly because they do not want to activate these accounts without being able to devote sufficient time to building the content of each media outlet. Center staff have, however, been able to collaborate on documents using GoogleDocs, mostly to assist with proposal and project information sharing and development processes.

I believe that the success of the DBC Project was due in part to its overall design; that is, the use of environmental scanning was helpful in effectively designing the project’s research component and in informing most of the marketing/branding recommendations provided to the Center. Research from Center client/partner interviews provided insight into how the Center’s current online status was performing, as well as the types of information valued by current/potential clients and partners, including which online venues (i.e., SM types) they preferred; while, research on the Center’s online presence versus those of Center partners, competitors, and affiliates provided information about how other evaluation and assessment groups were soliciting their own services online. Though the project was influential in helping the Center develop their marketing/branding practices, there were both pros and cons of the DBC Project’s outcomes.

Despite positive influences from DBC Project research, in looking back, I believe that the process my team and I used in reporting final marketing/branding recommendations to the Center was not as effective as it could have been. We provided a sufficient amount of information on how the Center could advance their online presence; however, I believe we could have done a better job of researching tools/resources to help the Center manage and maintain their ongoing marketing/branding efforts. In this sense, we did not fully conduct the necessary research needed to help us reach the project’s fifth objective: Researching methods and tools that could assist the Center in implementing new online or social media strategies.

My conclusions about the effectiveness of DBC Project recommendations comes from my insider’s view of the Center’s ongoing marketing/branding efforts; and, unfortunately, what consistently remains challenging for the Center is finding the time to enhance and revise their marketing/branding strategies, while also trying to complete day-to-day responsibilities such as communicating with and completing project work for existing clients.

My IMS team’s use of the concept of virtual commerce was appropriate in helping us provide appropriate and modern marketing/branding recommendations; nevertheless, what would have
been even more beneficial, is if we also should have referenced concepts related to effective marketing/branding strategies specifically related to non-profit organizations. Namely, I believe we emphasized too many recommendations on the different types of online marketing outlets the Center could use, and not enough information on how the Center should implement and/or manage these types of tools, considering the Center’s limited man-power and resources.

Also, based on my work with the Center’s marketing/branding materials and online accounts, I can tell that the Center has attracted additional clients/work since implementing new marketing/branding practices; however, I am not sure to what extent. This is why, I also believe that our team should have provided at least some type information on how to track or measure the success or failures of newly proposed marketing/branding outlets. No one at the Center, myself included, is knowledgeable about Web and/or social media analytics. Understanding more about these topics would be helpful to the Center in effectively measuring return on investment from their marketing/branding changes. This type of knowledge also could be beneficial because it would allow the Center to tweak and adapt their marketing/branding efforts based on what they know to be successful or unsuccessful contributors to their ongoing sustainability.

Other marketing/branding challenges that the Center has faced, since the DBC Project, relate to several additional environmental and organizational changes that have occurred at Miami since 2012. For example, Miami continues to enforce new marketing/branding guidelines for creation and dissemination of content to users outside of the University. That is, they have put a strict limit to the creation of marketing materials and content for smaller organizations such as Centers within the University. These guidelines put yet another strain on the Center's future marketing/branding plans, considering they will have to revise their current logo to Miami’s standards, which means also revising all of their tangible and online communications and marketing content.

Additionally, the E & A Center plans to merge resources with its affiliate Center, The Discovery Center in late 2015 as an ongoing effort to sustain each organization’s work. This merger comes with additional changes to their business model as well as to the way they envision managing current/future workloads. Part of this process will involve changes to current staff positions, including the addition of several new employees to help better manage the Center’s fiscal and communications/marketing work.
Given the pros and cons of the DBC Project’s outcomes, and recent environmental changes surrounding the Center, in the section to follow, I look ahead to possible next steps for the E & A Center’s marketing/branding strategies. In the concluding section of Chapter 4, I recap my experiences as a MTSC student and intern.

Next Steps for Ohio’s E & A Center Marketing/Branding Strategies

Despite limitations to the design of the DBC Project’s recommendations component, the E & A Center still continues to reference information provided by my IMS team, and remains committed to continuing efforts in enhancing and expanding their marketing/branding strategies.

In looking ahead, the Center plans to continue monitoring environmental changes surrounding their organizational system. Their hope is by continuing to do this, they will be able to determine which types of “inputs” are necessary in order to produce the desired “outputs” or outcomes of their future work. The Center also plans to research more information on how to effectively manage and build their online presence as well as how to assess the outcomes of each of their new marketing strategies. In particular, this research will focus on effective marketing/branding strategies already being implemented by non-profits.

At present, staff members meet bi-annually to discuss strategic planning activities, including their merger with The Discovery Center, and the restructuring of staff positions and responsibilities. Their plan to hire additional staff members, including a communications/marketing specialist will no-doubt help them to transition their marketing/branding efforts to the next level. Having a full-time employee dedicated to the Center’s marketing branding efforts will assist with processes necessary for revising information per Miami’s branding standards, as well as with building and sharing more information about the Center’s brand, their mission, and their services across multiple online outlets.

Final Reflections on my MTSC Program and Internship Experiences

My unique journey through the MTSC Program over the past half-decade has helped me grow professionally as well as personally. During this time, I had the unique opportunity to combine my work as a MTSC student with my responsibilities as an employee with the E & A Center. Through many of my MTSC course projects, I was able to evolve a number of the Center’s processes for
completing and promoting their work. Specifically, the editing and writing I completed in ENG 512, 692, and 694 (Technical & Scientific Communication courses) helped me significantly contribute to the Center’s process for designing, drafting, and producing technical and annual project reports and grant proposals. Courses such as ENG 507 (Interactive Business Communications) and COM 677 (Organizational Communication Independent Study) allowed me to examine and propose strategic changes to the Center’s organizational alignment as well as to lay the foundation for revised marketing/branding processes. Lastly, and most influential of all, my work in IMS 419/519 (Digital Branding) provided me with the knowledge and skills I needed to successfully develop and modernize the Center’s marketing/branding practices.

Aside from contributions to the Center, my time in the MTSC program also helped me gain a plethora of editing and technical writing skills; develop my grant proposal writing skills, including a personal and professional resilience in understanding how to navigate the field of non-profit work; and, learn how to represent myself and the Center among other non-profit professionals through networking and strategic marketing/branding practices.

The technical, organizational, and marketing/branding communications skills I learned as a MTSC student, not only contributed immensely to my ability to complete my internship with the E & A Center—they also added to my skill-set as a professional, and made me a more valuable employee to the Center. The strides I was able to make in blending my coursework and my professional work at the Center, will continue to assist the Center for years to come, and will greatly contribute to their efforts in producing quality products to clients, in strategically realigning their organizational and business models, and in marketing and sustaining their work. I look forward to continuing to apply my MTSC knowledge and skills to advance my own career path, as well as the Center’s mission and work.
REFERENCES


105
Award Abstract #0810978

ADVANCE Institutional Transformation Award: RU-FAIR- Rutgers University for Faculty Advancement and Institutional Re-imagination

NSF Org: HRD
Division Of Human Resource Development

Initial Amendment Date: July 18, 2008
Latest Amendment Date: August 7, 2013
Award Number: 0810978
Award Instrument: Cooperative Agreement
Program Manager: Jessie A. Dearo
HRD Division Of Human Resource Development
EHR Direct For Education and Human Resources

Start Date: September 1, 2008
End Date: August 31, 2014 (Estimated)
Awarded Amount to Date: $3,870,028.00

Investigator(s): Joan Bennett bennett@aesop.rutgers.edu (Principal Investigator)
Patricia Roos (Co-Principal Investigator)
Catherine Duckett (Former Co-Principal Investigator)
Lynn Schneemeyer (Former Co-Principal Investigator)
Nancy Rosoff (Former Co-Principal Investigator)

Sponsor: Rutgers University New Brunswick
3 RUTGERS PLAZA
NEW BRUNSWICK, NJ 08901-8559 (848)932-0150

NSF Program(s): ADVANCE - INSTITUTIONAL TRANSF,
CLB-Advance-IT
Program Reference Code(s): 0000, 1738, OTHR, CL10
Program Element Code(s): 1738, 9104

ABSTRACT

The Rutgers University for Faculty Advancement and Institutional Re-imagination (RU FAIR) project at Rutgers University, the State University of New Jersey, will promote the participation and advancement of women in science, engineering, and mathematics (SEM) on all three campuses of Rutgers University (Camden, Newark and New Brunswick) through five interrelated initiatives:

- Recruitment and retention initiatives: Implement a targeted strategy for increasing the number of women in general, and minority women in particular, on the SEM faculty of Rutgers University, including skills training for search committees (RU-InSTRIDE), leadership training for established faculty, and a coordinated mentorship program.
- Communication Initiatives: Enhance communication among faculty within a geographically and structurally complex multi-campus university. We will build on existing initiatives to enhance our web presence and establish RU FAIR professorships within different schools and campuses. We will give SEM faculty from different campuses more opportunities to network. RU-FAIR professors will be selected by competitive application. The RU-FAIR professors will work on the Recruitment and Retention, Networking and Liaisons, and Visibility Initiatives.

- Networking and Liaisons with Women's Programs Initiatives: Encourage interdisciplinary research across schools and campuses and to work closely with the nationally acclaimed Rutgers Institute for Women's Leadership (IWL) to deliver leadership training, to encourage research, and to develop interdisciplinary courses.

- Visibility Initiatives: Achieve greater visibility for our women faculty by creating a bigger web presence, instituting a lecture series, nominating our faculty members and postdoctoral associates for prestigious awards, and working with the Rutgers Media Relations to generate increased press coverage for their research accomplishments.

- Family Initiatives: Bolster the resources available for dual career families, families with children, and families caring for elderly members. We will institute a dialogue among administrators, faculty, and staff concerning what changes in current campus structure, tenure regulations, and other policies would best accommodate the needs of families.

Broader Impacts. The project outcomes include: increased recruitment of female and minority faculty; reduced attrition of women and minority faculty; increased numbers of women promoted to full professor and professor II; increased numbers of women rising to leadership positions in either academic administration or areas of scholarly leadership; increases faculty satisfaction by encouraging collaborative projects and creating opportunities for science faculty to become involved in such projects, especially in collaboration with faculty in the Institute for Women's Leadership or Women's and Gender Studies; and increases visibility of female Rutgers SEM faculty as measured by press coverage and awards received.

Intellectual Merit. The project activities are based on activities which have been implemented in other sites and adapted to the Rutgers University campuses. In addition, by collecting data on the proposed programs, evaluating their impact and disseminating project information to the scientific and women's and gender studies communities, this project will make a significant contribution to understanding techniques and tactics that promote advancement and retention of women scientists at a multi-campus university which has geographically disperse campuses.

PUBLICATIONS PRODUCED AS A RESULT OF THIS RESEARCH


BOOKS/ONE TIME PROCEEDING

(Showing: 1 - 10 of 20) Show All


Arbuckle-Keil, Georgia A. and Valentine, Doreen. ""Initial Impacts of an NSF ADVANCE-IT Award to Rutgers University from the Viewpoint of the Camden Campus", 06/30/2010-10/05/2010, Karukstis, K, Gourley, B., Rossi, M., and Wright, L.L."Mentoring Strategies to Facilitate the Advancement of Women Faculty", 2011, "ACS Symposium Series, ACS Books".

Arbuckle-Keil, Georgia A. and Valentine, Doreen. ""Initial Impacts of an NSF ADVANCE-IT Award to Rutgers University from the Viewpoint of the Camden Campus", 10/05/2010-12/30/2010, Karukstis, K, Gourley, B., Rossi, M., and Wright, L.L."Mentoring Strategies to Facilitate the Advancement of Women Faculty", 2011, "ACS Symposium Series, ACS Books".


(Showing: 1 - 10 of 20) Show All

Please report errors in award information by writing to: awardsearch@nsf.gov.
<table>
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<th>Name</th>
<th>Purpose</th>
<th>Limitations</th>
<th>URL</th>
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<tr>
<td><strong>American Electric Power Foundation</strong></td>
<td>The foundation supports programs designed to improve lives through education from early childhood through higher education; provide basic human services in the areas of hunger, housing, health, and safety; and enrich the quality of life of communities through art, music, and cultural heritage.</td>
<td>Giving primarily in areas of company operations in AR, IN, KY, LA, MI, OK, TN, TX, VA, and WV, with an emphasis on OH. No support for religious, fraternal, athletic or veteran organizations. No grants to individuals.</td>
<td><a href="http://www.aep.com/citizenship/aepfound">www.aep.com/citizenship/aepfound</a></td>
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<tr>
<td><strong>The William Bingham Foundation</strong></td>
<td>The foundation furthered the philanthropic intent of its founder, Elizabeth Bingham Blossom. It supports organizations in the fields of education, science, health and human services, and the arts. It works for a world that is environmentally sustainable, seeks to strengthen civil society and its institutions, educates family members and others in the values and practice of philanthropy, community service, and stewardship, and it seeks to build a sense of community.</td>
<td>Giving on a national basis, with focus on areas in which the foundation trustees reside: Washington, DC, FL, OH, RI, and SC. No support for foreign organizations. No grants for individuals; no loans.</td>
<td><a href="http://foundationcenter.org/grantmaker-search">foundationcenter.org/grantmaker-search</a></td>
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<tr>
<td>The Greater Cincinnati Foundation</td>
<td>Giving limited to southeastern IN, northern KY, and the greater Cincinnati, OH area. No support for private or parochial religious purposes, units of government or government agencies, schools, hospitals, nursing homes, or retirement centers. No grants to individuals (except for scholarships), or for operating budgets, fundraising drives, event sponsorship, or underwriting, equipment, stand-alone publications or videos, annual campaigns, deficit financing, endowments, travel, fellowships, internships, exchange programs, or scholarly or medical research; no loans. Increase health and wellness of Greater Cincinnati residents Improve access to comprehensive primary medical and dental care and specialty services across the lifespan with emphasis on underserved populations Encourage healthy living, prevention/health promotion and management of chronic diseases Ensure access to services that Improve individual and family social and emotional functioning and well-being</td>
<td>Grants for a broad range of existing activities in general categories of arts and culture, community progress, environmental needs, education, health, and social and human services, including youth agencies. The foundation actively seeks to promote access, equity and diversity, and to end discrimination based on race, ethnicity, gender, disability and age.</td>
<td><a href="http://www.gcfdn.org">www.gcfdn.org</a></td>
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<td>Charles H. Dater Foundation, Inc.</td>
<td>Giving primarily in the greater Cincinnati, OH, area. No grants to individuals, or for scholarships, debt reduction, or for capital projects.</td>
<td>The foundation makes grants to private, nonprofit organizations and public agencies in Greater Cincinnati, Ohio, for programs that benefit children in the region in the areas of arts/culture, education, health care,</td>
<td><a href="http://www.daterfoundation.org">www.daterfoundation.org</a></td>
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private, non-profit organizations and public agencies in Greater Cincinnati for programs that benefit children in the region in the areas of arts/culture, education, healthcare, social services and other community needs. Greater Cincinnati is defined as the eight-county metropolitan area made up of the counties of Hamilton, Butler, Warren and Clermont in Ohio; Boone, Kenton and Campbell in Northern Kentucky; and Dearborn in Indiana. The Foundation does not make grants to individuals, for scholarships for individuals, for debt reduction, and, with rare exception, for capital fund projects. Grants are usually made for one year and subsequent grants for an extended or ongoing program are based on an evaluation of annual results. Multiple grants to an organization in the Foundation's same fiscal year (September through August) are possible, but rare. The Foundation looks favorably on applications that leverage a grant to seek additional funding and resources as well as an organization's effective use of volunteer resources. The Foundation's directors/officers regularly evaluate the grantmaking focus and priorities based on an assessment of current community needs and available resources. **Timing** The Grant Request/Application process requires a minimum of 30-
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<th>Foundation</th>
<th>Giving Area</th>
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<tr>
<td>The Dayton Foundation</td>
<td>Giving limited to the greater Dayton and Miami Valley, OH, area.</td>
<td>No support for religious organizations for religious purposes, or public or private schools. No grants to individuals (except for specific scholarships and award programs), or for operating budgets, exchange programs, professorships, continuing support, travel, fundraising drives, special events, annual campaigns, deficit financing, endowments, or scientific, medical, or academic research; no loans or program-related investments.</td>
<td><a href="http://www.daytonfoundation.org">www.daytonfoundation.org</a></td>
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<td>The Thomas J. Emery Memorial</td>
<td>Giving primarily in the greater Cincinnati area, including Hamilton, Butler, Clermont and Warren counties in OH, and Boone, Campbell and Kenton counties in KY.</td>
<td>No support for non 501(c)(3) organizations. No grants to individuals, or for continuing support or conferences; no loans. The purpose of the foundation is to secure a citizenry which shall be more sane, sound and effective because of more satisfactory initial conditions of environment and education. The foundation is used for the physical, social, civic and educational betterment of individuals.</td>
<td><a href="http://www.gcfdn.org">www.gcfdn.org</a></td>
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<td>The Fifth Third Foundation</td>
<td>Giving primarily in areas of company</td>
<td>The foundation supports development of areas of company, education, economic development, and community growth.</td>
<td><a href="http://www.53.com/wps/portal/av/?New">www.53.com/wps/portal/av/?New</a>...</td>
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<td>Foundation Name</td>
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<td>The Kettering Fund</td>
<td>Giving limited to OH.</td>
<td>For scientific, medical, social, and educational studies and research.</td>
<td>fund.cfketteringfamilies.com</td>
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<td>Mathile Family Foundation</td>
<td>Giving primarily in the Dayton and Montgomery County, OH, areas.</td>
<td>To create opportunities for children in need by focusing support on children and their families who have already demonstrated the motivation to succeed. The focus is on three areas: family, education and health.</td>
<td><a href="http://www.mathilefamilyfoundation.org">www.mathilefamilyfoundation.org</a></td>
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<td>NiSource Charitable Foundation</td>
<td>Giving on a national basis in areas of company operations, with some emphasis on IN and OH. No support for religious organizations, political candidates or organizations, or discriminatory organizations. No grants to individuals, or for sports sponsorships, goodwill advertising, fundraising benefits, or program books.</td>
<td>The foundation supports programs designed to promote community vitality and development; environmental and energy sustainability; learning and science education; and public safety and human services.</td>
<td><a href="http://www.nisource.com/en/sustainability/">www.nisource.com/en/sustainability/</a></td>
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<td>Organization</td>
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<td>Ohio Casualty Foundation, Inc.</td>
<td>Giving limited to areas of company operations in Washington, DC, DE, KY, MD, OH, PA, VA, and WV. No support for religious organizations not of direct benefit to the entire community, fraternal, social, labor, or political organizations. No grants to individuals, or for trips, tours, or transportation, debt reduction or liquidation, or conferences, forums, or special events. The foundation supports organizations involved with arts and culture, education, health, human services, community development, civic affairs, and economically disadvantaged people.</td>
<td><a href="http://www.ohiocasualty-ins.com/omapp...">www.ohiocasualty-ins.com/omapp...</a></td>
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<td>Albert G. and Olive H. Schlink Foundation</td>
<td>Giving primarily in OH. No grants to individuals or for operating expenses.</td>
<td>Grants to organizations providing aid to the indigent, aged, including religious, educational, and health agencies and hospitals; support also for the blind and for hospice and other national agencies and charities.</td>
<td>Albert G. and Olive H. Schlink Foundation 49 Benedict Ave., Ste. C Norwalk, OH 44857-2161 Contact: Robert A. Wiedemann, Pres. Fax: (419) 668-2813</td>
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<tr>
<td>Wodecroft Foundation</td>
<td>Giving primarily in southwestern FL, and southwestern OH. No grants to individuals.</td>
<td>Giving primarily for the arts, particularly a performing arts center; funding also for higher education, health and hospitals, including a children’s hospital, and youth and social services.</td>
<td>Wodecroft Foundation 255 E. 5th St., Rm. 1900 Cincinnati, OH 45202-4720 Telephone: (513) 977-8236 Contact: J. Michael Cooney Esq., Chair.</td>
</tr>
<tr>
<td>Name/Sponsor(s)</td>
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<td><strong>Hands on the Land Network Support: Youth Education and Engagement</strong>&lt;br&gt;United States Department of the Interior (DOI) Bureau of Land Management (BLM)**&lt;br&gt;<strong>Key words:</strong> Environmental Education; Youth Development or Leadership</td>
<td>Nonprofits that do not have a 501(c)(3) status with the IRS, other than institutions of higher education may apply.</td>
<td>The purpose of the proposed program is to provide support to the BLM for the existing Hands on the Land (HOL) Network of outdoor classrooms. HOL is a network that includes approximately 115 sites from coast to coast. All sites offer programs in conservation education that supporting local standards of learning and are associated with one of six Federal agencies: the Bureau of Land Management, U.S. Fish and Wildlife Service, National Park Service, U.S. Forest Service, Natural Resources Conservation Service, and National Oceanographic and Atmospheric Administration (NOAA). This project will protect resources on public lands by supporting the development and delivery of quality, long-term educational programming that supports local schools and communities while fostering environmental literacy, stewardship, and awareness of public lands in America, including the benefits of being outdoors in nature. BLM's Hands on the Land sites are outdoor laboratories for learning, which promote leveraging of resources from community partners.</td>
<td><a href="http://www.grants.gov/search/search.do?jsessionid=FyKhPnDTWSjyh8MTGi2v6n32J5qYGQJzVnC1py3GB3Xw74vYhh3I-522510686?oppId=180875&amp;mode=VIEW">http://www.grants.gov/search/search.do?jsessionid=FyKhPnDTWSjyh8MTGi2v6n32J5qYGQJzVnC1py3GB3Xw74vYhh3I-522510686?oppId=180875&amp;mode=VIEW</a></td>
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<td><strong>Dow Chemical Company</strong>&lt;br&gt;<strong>Key words:</strong> Science Education, Natural, Physical, and</td>
<td>Dow does not contribute to religious organizations, individual requests,</td>
<td>To facilitate the process, requests for Dow contributions must meet at least one of the following criteria: 1. Addresses a demonstrated need in a city or community in which the company has a presence 2. Provides an opportunity for a hands-on science</td>
<td><strong>Contact Information:</strong>&lt;br&gt;The Dow Chemical Company Public Affairs 2030 Bldg Midland, Michigan 48674</td>
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**Dow Chemical Company**

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1. Addresses a demonstrated need in a city or community in which the company has a presence
2. Provides an opportunity for a hands-on science

**Contact Information:**
The Dow Chemical Company Public Affairs 2030 Bldg Midland, Michigan 48674
| Environmental Sciences | - trip expenses, - non-501(c)(3) organizations, - organizations that charge fees or dues, or - lobbying organizations. | experience for students below the college level to engender a more enjoyable learning atmosphere for them to discover the values of science.  
3. Supports a post-secondary project or program involving science, engineering, business or other related area to also expand and improve the pool of talented students from which we can choose future employees.  
4. Enhances the environment. |
|---|---|---|
| **Explore Fund: North Face** | Organizations must have 501(c)(3) status.  
Applications that come with matching dollars will be viewed favorably & this will be taken into consideration during the granting process.  
All funding requests should be quantifiable with specific goals, objectives, and action plans, with a clear measure for evaluating | The goal of the fund is to inspire and enable the next generation of explorers by funding non-profit organizations that are working to re-connect children with nature. The North Face believes in the physical, emotional and social benefits of a healthy, active outdoor lifestyle, and that a strong connection with the outdoors will lead to greater support and protection of the natural landscapes.  
The Explore Fund will support organizations that encourage youth outdoor participation, focusing primarily on creating more connections of children to nature, increasing access to both front & backcountry recreation, as well as providing education for both personal & environmental health.  
Applications must focus on:  
- Projects that include community demographics, estimated number of participants, and anticipated outcomes.  
- Proposals that encourage community involvement.  
- Programs that focus on breaking down barriers to getting youth outdoors. |
| **Keywords:** Physical Fitness; Community or Outreach Program; Recreation and Leisure Studies | | [http://explorefund.org/](http://explorefund.org/) |
The project or program should seek a specific audience and reach out to a specific community or place of interest. The program should have a good chance of significant measurable results & momentum over a fairly short term (one to three years).

**Healthy Sprouts Awards**

**National Gardening Association**

**Keywords:** Nutrition Education; Horticulture

To be eligible for the 2011 Healthy Sprouts Awards, a school or organization must plan to garden in 2012 with at least 15 children between the ages of 3 and 18.

Garden programs engage children by providing a dynamic environment where they can observe, discover, experiment, nurture, and learn. Through gardening activities, children develop respect for their environment and establish an important connection with nature.

Edible gardens in particular provide opportunities for youth to learn how to nurture and care for other living things while also learning how to care for themselves. They experience first-hand, the process of growing food and the skills needed to increase their access to fruits and vegetables. Edible gardens also provide opportunities to teach kids how to care for others in their community. What better way to create awareness about hunger than to have them actively involved in growing a garden, or part of a garden, to donate to a local food pantry.

The Subaru Healthy Sprouts Award recognizes and supports youth gardening programs focused on teaching about our environment, nutrition and hunger issues in the United States. Through winning programs, youth will learn the skills necessary to maintain a healthy lifestyle compatible with


**Contact Information:**
National Gardening Association 1100 Dorset Street South Burlington, Vermont 05403 Phone: +1 (800) 538-7476 Fax: +1 (802) 864-6889
Champions for Healthy Kids

General Mills Foundation/Grants Program

**Keywords:** Community Health; Community Services

| Organizations with 501(c)(3) and 509(a) status are eligible. While grant applications in communities with General Mills employees, retirees, and facilities take high priority, the foundation makes a limited number of grants to national organizations for programs that compliment the foundation's funding priorities. | In partnership with the American Dietetic Association Foundation and the President's Challenge, the General Mills Foundation developed the Champions for Healthy Kids grant program in 2002. Each year, the foundation awards grants to community-based groups that develop creative ways to help youth adopt a balanced diet and physically active lifestyle. The President's Challenge has a model program for fitness - the Presidential Active Lifestyle Awards. These awards recognize youth ages 6 to 17 for establishing and maintaining a physically active lifestyle. In addition to the community grants, the General Mills foundation sponsors up to 50,000 young people to participate in the President's Challenge and earn the Presidential Active Lifestyle Award for their commitment to a physically active and fit lifestyle. | [http://www.generalmills.com/Responsibility/Community_Engagement/Grants/Champions_for_healthy_kids.aspx](http://www.generalmills.com/Responsibility/Community_Engagement/Grants/Champions_for_healthy_kids.aspx)  

**Contact Information:** General Mills Foundation P.O. Box 200 Minneapolis, Maine 55440 Phone: +1 (612) 764-7890 Fax: +1 (612) 764-4114 |
I am Center Coordinator for Ohio’s Evaluation & Assessment Center for Mathematics and Science Education at Miami University of Ohio. As Center Coordinator, for the past 3 years, I have helped prepare over 30 state and federal grant proposals totaling over $3 million in funding. Some of my responsibilities in preparing grant proposals includes the following: a) thorough analysis of requests for funding (RFP), b) research of required information to inform project planning and implementation, c) retrieval, completion, and submission of all required forms for the proposal, d) editing and revising of the main proposal narrative, and e) final organization and compilation of final proposal pieces. Recently, I assisted with 2 large Ohio Department of Education Race to the Top (RtT) grant proposals which were funded and will provide work for Ohio’s E & A Center through 2014 (evaluation budgets totaling $1,091,774). My work at Ohio’s E & A Center has provided experiences in many areas of grant writing, including research and human-subject rights, proposal preparation and writing, as well evaluation and assessment.

I also have experience as an independent research consultant. For instance, in 2010 I conducted research for The Learning Tree Farm (LTF), an Ohio educational farm offering students hands-on learning experiences beyond the classroom. I researched and summarized critical information on several of the best possible Ohio funding opportunities available to LTF in order to help them further their educational initiatives.

In addition to my employment experience at Miami University, I am pursuing a Master’s in Technical and Scientific Communication (MTSC). As a MTSC student, I have gained experience writing grants (e.g., for Ohio State Parks, Hamilton County Parks District). Also, I have developed several white papers related to grant writing and content/knowledge management. This summer, I am completing my internship requirement for the MTSC program and will conduct research to study the genre(s) of grant writing (Tardy, 2003). My MTSC internship research will include a textual analysis of several funded and unfunded proposals and interviews of many of the key players (e.g., PI, PO, reviewer) of each genre system in grant writing. The main goals of my research are to: 1) gain a genre system(s) perspective of grant writing; 2) extract common themes from my research for successful navigation through each genre system; and 3) compare my findings to current recommendations for becoming a successful grant writer.

I also recently completed 16 hours at a Nonprofit Organization Proposal Development Workshop in April 2012 (Grant Training Center, University of Cincinnati, Cincinnati, OH).
*How do you anticipate your attendance at the GPA Annual Conference will enhance your growth or performance as a grant professional? (Please limit your response to 500 words or less)*

In relation to Tardy’s (2003) research, I believe that an additional genre system of the grant writing world involves the network of professionals attending local and national professional grant-writing conferences and events. As a novice grant writer, I believe I will be able to expand my own knowledge of the grant writing process by attending the GPA’s 2012 Conference by networking with other professionals. If I am able to attend the conference, I will participate in several GPA 2012 Conference sessions to build upon my current knowledge as well help me gain new insights regarding grant writing. Sessions I will attend include: *Grant Writing: Craft or Commodity?; Sustaining Your Grant Consulting Business; Inside the Grant Review Process; Consulting: 4 Winners & Best Practices; Magic!: Transforming Grant Skills into Career Options; Winning Grants: A Tour of Successful Case Studies; Grants from the Reviewer’s Point of View and How to Become One; One Size Doesn’t Fit All When it Comes to Evaluation.*

My short-term career goals are to a) receive my Master’s MTSC degree by December 2012; and b) receive accreditation from the American Grant Writers Association within 2 years. My long-term career goals include a) individual authorship (fiction and non-fiction); b) continuing to develop expertise in research and writing of grant proposals; as well as c) establish myself as an independent consultant in technical research and grant preparation.

I believe that my attendance at the GPA’s 2012 Conference will significantly strengthen the skills and knowledge required to move me toward my personal and professional goals.

*How do you anticipate your attendance at the GPA Annual Conference will benefit your organization? Please include a brief description of your organization and limit your response to 500 words or less.*

Ohio’s Evaluation & Assessment Center for Mathematics and Science Education was founded in 2003; it is a specialized, non-profit center that provides comprehensive, high-quality research, evaluation, and assessment services to deliver reliable and accurate information about the outcomes of STEM programs and projects. Ohio’s E & A Center has been a self-sustaining organization for more than a decade; however, all of the Center’s work is dependent on state and federal grant monies. The Center is continuously faced with the task of adapting its organizational and businesses strategies to its changing environment. As Center Coordinator, I share responsibility for strategic planning and visioning for my organization.

The Center’s current strategic plan for sustainability includes objectives such as: a) reexamining internal communications strategies while expanding external communications strategies; b) fine-tuning employee’s skills and continuing to develop new competencies; c) considering the qualities that will give the Center a competitive edge; and d) ensuring that all employees and stakeholders are aware of the mission and vision of the Center.
As an employee at Ohio’s E & A Center, the skills and competencies I will gain from attending the GPA’s 2012 Conference sessions will be used to help the Center reach its goals for competitiveness and sustainability. I will gain valuable knowledge in effective grant preparation and writing, but more importantly, attending the conference will provide the opportunity to network and share information with potential stakeholders about our Center’s expertise, experience, and available services.

*Please describe any other factors you would like us to consider as part of this application, including any special circumstances. (Limit your response to 500 words or less)*

As a first-time conference attendee, I will gain an abundance of valuable skills and knowledge that will benefit not only me as a student and working professional but also the non-profit organization where I work. By attending the 2012 conference, I will be able to improve my professional knowledge and skills in grant writing; promote positive relationships between grant professionals and their stakeholders; and work toward becoming a leader and role model in the field of grantsmanship practices identified by the GPA’s code of ethics.

In conclusion, as a non-traditional student, working full-time while also studying to advance my education, the Grant Professional Foundation’s monetary support for my attendance at the GPA’s 2012 Conference would enable me to have an important professional and personal experience that I otherwise will not be able to have.
As a first-time participant, I can enthusiastically claim several takeaways from my attendance at the 2012 Grant Professional Association’s Conference, two of which I’d like to share here. The first takeaway was a true reassurance that I am, in fact, following the right career path. Second was the affirmation that I am building a network of the right people who will help me become a well-rounded non-profit professional. That is, a passionate and self-directed professional driven to constantly improve and forge ahead despite difficult circumstances, and most importantly, someone proficient not only in grant writing but also in successfully navigating and staying current in the non-profit world.

Before I detail my experiences at the 2012 GPA conference, I would like to again thank the Grant Professionals Foundation for the scholarship I received to attend the 2012 conference. I also would like to share a little bit about my experiences with grants and grant writing prior to attending the conference.

While earning my undergraduate degree in 2007, my end goal was to become an English teacher. That plan changed while participating in my field-experiences, which convinced me that teaching was not the correct career path for me. After graduation, I focused on obtaining a job where I could at least apply my language arts skills. I eventually took a position with a non-profit evaluation and assessment center for mathematics and science education. It was at the Center that I was first introduced to grant writing. I have been with the Center for nearly 6 years. During that time, I have assisted with evaluation and assessment activities for grants contracted with the Center, and planned and developed proposals for state- and federally-funded grants written by the Center, while simultaneously working to earn a graduate degree in technical and scientific communication.

In summer 2012, I completed an internship for my graduate program. Much of my time since has been spent reflecting on what “clicked” for me during my graduate program and areas where I need to learn more in order to become a well-rounded non-profit professional. In thinking about my professional and educational experiences, I realized that in order to become successful in a non-profit career, I need to acquire more than just grant “writing” knowledge. I also realized that I learned the most when I was either working alongside other professionals or being mentored by a more experienced professional. During these times, I not only had frequent opportunities to apply my own knowledge but also to extract knowledge from those with whom I was working.

My internship expanded my perspective on how to learn about grants and grant writing. Previously, I believed that becoming an expert grant writer meant merely perfecting my persuasive writing skills. I also believed that obtaining knowledge about grant writing was as simple as finding the perfect template to follow when writing a grant, or that one book containing any and all grant writing secrets, or even that one really intense workshop that would turn me into an expert grant writing professional. Over the past 6 years, I have acquired grant writing knowledge in all three of these ways. Each experience taught me something beneficial; however, each allowed little time to work actively and collaboratively with others as a means for learning and growing. Each experience provided valuable information on how to “write” successful grant proposals, but no experience provided genre knowledge related to the “before” and “after” processes of writing a grant proposal.

(continued on page 17)
To be more specific, I desired but lacked a multidisciplinary view of grant writing, that is, an understanding of how local, state, and federal policy and politics influence RFP/RFA/solicitations and grants; how to budget and manage a grant; how to conduct appropriate research for a proposal; how to practice responsible ethics and follow human subjects’ protocols; and how the proposal review process works. Though my past work and school experiences touched on these areas and provided scholarly information relevant to these topics, it wasn’t until the reflective phase of my internship and informal educational opportunities which followed that my grant writing knowledge began to mature and expand. What I realized after my internship was not just that I had a lot more grant writing “skills” to obtain, but also that that I needed to engage in an environment that allowed for more collaboration and a higher-level of mentorship. In a classroom full of students, and even in my work environment, it has not always been easy to achieve the level of attention and time that intense mentoring can involve.

I should note that as a result of my internship, I developed a mentor-like relationship with a member of my internship committee. Fortunately, she introduced me to GPA and has helped fuel my desire to seek out others in the non-profit sector with whom I can connect in the ways I desire. Following graduation, I plan to continue my learning by reaching out to find opportunities that allow me to gain first-hand experience, by collaborating with other non-profit professionals, and by engaging experts in the non-profit sector as mentors. I remain eager to take what I have learned in my graduate program and branch out on my own, to network and collaborate, and to find a few non-profit experts from whom I could learn and include in my mentoring network. I look forward to increasing the time I spend working with other professionals, especially those more experienced than myself. When I learned about

the 2012 GPA Conference from my internship mentor, my hope was that it would provide another vehicle for learning about the many genre systems of grant writing, as well as more opportunities to collaborate and interact with non-profit veterans. So, in October of 2012, I attended the GPA Conference, which brings me back to discussing a few of my experiences from the conference as well as what I have been encouraged to do as a result.

The first experience which reassured me I am pursuing the right career was during David Bower’s exceptional keynote speech on Friday morning of the conference. There was a moment during one of his many stories about overcoming great hardship when I sheepishly looked up through my own teary eyes and found more than a handful of people around me also moved to the point of tears. In that moment, I was reassured that I was exactly where I was meant to be not only on my career path, but also in life. More importantly, the experience reaffirmed my passion for non-profit work amongst a group of equally passionate non-profit professionals, seeking to work in a field where our skills can make a difference and influence great change for others in need.

The second notable experience I had at the conference reassured me that I am surrounding myself with the right people who will help me excel in my career. This reassurance came during Trish Tchume’s, Director of the Young Non Profit Professionals Network, keynote speech. During her speech she discussed speculation that younger generation Millennials are just waiting for all of the Baby Boomers in the non-profit sector to either retire or die so they can take their jobs. I had never heard this before but had two strong reactions after Trish’s speech. My immediate reaction was one blanketed in humor; as a young up-and-comer in the non-profit world, I chuckled to myself and thought,
“NO! Don’t die yet! I need one of you to be my mentor first!” My next reaction was more serious. I agreed with Trish that there are true generational gaps among professionals in the non-profit sector. Mostly, I agreed with her discussion on the benefit of examining the gaps between Millennials and Baby Boomers in order to foster a connection that could become a new type of multi-generational leadership. Prior to Trish’s speech, I also had not heard of multigenerational leadership. I was, of course, elated to find out that the philosophy behind multigenerational leadership is “an organizational, network, and movement stance in which leaders of all ages prioritize their shared values and leverage the perspectives and capacities of all generations to achieve progressive social change together” (Tchume, 2012). I was encouraged to learn about this type of information-sharing across generations through interaction and collaboration because it seemed like the same type of teaching and learning environment I have been searching for since my graduate internship.

After the conference, I researched opportunities for interaction and collaboration offered by the Young Non Profit Professionals Network. I was excited to find other non-profit professionals from whom I could learn or at least other young non-profit professionals whom I could learn along-side. I have since signed up to follow YNPN and their Cincinnati Chapter on several of their social media networks. After the conference, I also began researching multigenerational leadership to learn more about the concept. I read several blog entries by Trish Tchume, including an article by the Building Movement Project (BMP). According to BMP, “with up to four generations at work, nonprofit leaders are now struggling to make room for the ideas and skills of new generations, while figuring out how to support the continued presence of older more seasoned workers” (McAndrews, 2010, intro).

In thinking about the mixture of professionals who participated at the 2012 GPA Conference, I imagine it must be a bit of a challenge to create a conference that can, as a whole, serve such a diverse population. Such as conference has to accommodate the needs of professionals at many different skill-levels, in many different specialist areas (e.g., environmental, humanities, health, education) and cover different genre areas related to grant writing (e.g., RFPs, IRB, budgeting, evaluation).

Though I have only attended one of GPA’s conferences so far, it seems as though GPA is successfully meeting the needs of many different non-profit professionals at many levels who attend the conference. I can attest, as a novice non-profit professional, that the conference I attended met many of my needs and offered experiences which left me thirsting for more and filled me with a new enthusiasm and excitement about taking the next steps I need to excel in a non-profit career. I am excited to attend the 2013 conference and am confident that it will offer many new learning opportunities to novice and veteran non-profit professionals alike. I would, however, like to encourage GPA (if they haven’t already) to consider offering 2 new types of workshops. The first would be a workshop grounded in the philosophy of multigenerational leadership. This type of workshop could offer a place for novices to learn from and alongside veterans and vice versa. The second workshop could offer career development to newcomers in the non-profit world. This type of workshop could discuss different types of careers in the non-profit sector; benefits and challenges to such careers; available organizations like YNPN who offer opportunities for collaboration and mentoring to young non-profit professionals; and even information on institutions like IUPUI who offer advanced opportunities for education when seeking a career in non-profit work. (continued on page 21)
Conference Report: 
Using Multidisciplinary Knowledge and Multigenerational 
Mentoring to Learn Grant Writing

Emily E. Ryan

As a graduate-level student, I was able to attend the 2012 conference by the grace of a general scholarship offered by GPF; however, I would like to encourage the development of a scholarship specifically directed at graduate-level students interested in pursuing a career in the non-profit sector. This type of scholarship could free up GPF’s general scholarship for others seeking assistance in attending the conference while focusing on attracting a larger crowd of new-comers to the non-profit sector who could attend and benefit from the above-mentioned 2 new types of workshops. I believe a scholarship aimed at graduate-level students could attract and give more individuals at a novice-level the opportunity to expand their professional experiences by networking with other professionals. My attendance at the conference encouraged me to continue to pursue a career in the non-profit sector, to connect with the YNPN, to research and learn more about the movement toward building multigenerational leadership, and to search for more opportunities to connect with GPF. I was so positively affected by my time at the conference that I want other graduate students like myself to be able to attend future conferences so they can learn more about themselves professionally and the non-profit profession.

I would be more than willing to exert my own energy into assisting with GPF’s fundraising activities so they could provide support for non-profit professionals at the graduate-level. Staying involved in GPA and GPF’s efforts would allow me more opportunities to become a well-rounded non-profit professional and would also bring me one step closer to the day when I am able to stand up in front of a group of individuals and offer words of wisdom and encouragement with the same enthusiasm and energy as did David Bowers and Trish Tchume at the 2012 GPA Conference. It is my goal to remain connected to GPA, not just so that I can learn more and unite with others, but also so that I can one day influence up-and-comers searching for new opportunities to learn. I want to be able to influence novices, like myself, who are yearning to succeed at their craft and who are dedicated to their work and to making a difference because of what they do. One day when I reach this professional goal of mine, I hope to stand in front of a group of other professionals in my field and share with them the same motto which has helped keep me fueled in achieving my personal/career endeavors and which I was reminded of through my experiences at the 2012 GPA conference:

“May today there be peace within. May you trust that you are exactly where you are meant to be. May you not forget the infinite possibilities that are born of faith in yourself and others. May you use the gifts that you have received, and pass on the love that has been given to you. May you be content with yourself just the way you are. Let this knowledge settle into your bones, and allow your soul the freedom to sing, dance, praise and love. It is there for each and every one of us.” — Saint Therese of Lisieux

Take It For Granted is the eNewsletter of the Grant Professionals Association and is issued four times per year. Please send comments, questions or ideas for articles to any of the Newsletter Committee members listed below.

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E & A Center Communications Plan

I. Communications Planning Team

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II. Goals of Communications Plan

Goal 1: Increase the visibility of the E & A Center and familiarize potential clients and collaborators with the Center’s purpose, significance and services.

Target stakeholder audiences:
- Potential clients and collaborators, including:
  - School districts and personnel
  - College and university faculty
  - State and federal agency personnel
  - Professional education organizations
  - Professional development providers
  - Education foundations

Intended outcomes:
- Identify and clarify the Center’s purpose and work
- Increase the Center’s client base

Core strategies:
- Clearly brand the work and materials of the Center
- Create and disseminate public relations and marketing materials
- Make available user-friendly online information and resources
Communications Activities:
1. Create, update and disseminate public relations materials, including E & A Center bookmarks, tri-fold brochure, flash drives, etc.
   a. Person(s) responsible: Emily Ryan
   b. Support required: Time for creation and design time, communication with University Print Center, printing and materials costs
   c. Key message: The E & A Center provides high quality evaluation and assessment for programs and projects in science and mathematics education.

2. Maintain and expand the E & A Center’s website by update existing links and resources, adding new links, and including downloadable materials and resources.
   a. Person(s) responsible: Sarah Woodruff, Debbie Zorn, and Emily Ryan
   b. Support required: Time for team to collaborate regarding ideas for expansion of website, feedback from existing clients, time with and cost of labor for working with University IT Services and web development groups, and external consultants
   c. Key message: The E & A Center’s website is a valuable tool for communicating to existing and potential clients.

3. Attend and present at state, regional and national conferences and meetings.
   a. Person(s) responsible: Sarah Woodruff and Debbie Zorn
   c. Key message: Attendance at conferences and meetings provides E & A Center personnel with professional connections with existing and potential clients.

Goal 2: Provide current clients with resources and support needed to execute successful proposals and projects, as well as understand the fundamentals of assessment and evaluation.

Target stakeholder audiences:
- Current clients and collaborators, including:
  - School districts and personnel
  - College and university faculty
  - State and federal agency personnel
  - Professional education organizations
  - Professional development providers
  - Educational foundations

Intended outcomes:
- High client satisfaction with Center services and support
- Retain current clients and increase referrals
- Exceed expectations of external funders with provided evaluation services
- Make available user-friendly information and resources

Core strategies:
- Maintain regular electronic, phone and face-to-face communications with clients
• Assist clients with activities to garner and maintain external funding
• Provide high-quality reports for a variety of audiences and purposes
• Provide resources to clients to ensure understanding of research and evaluation activities

Communications Activities:
1. Communicate regularly with current clients on projects, proposals, and programs.
   a. Person(s) responsible: Sarah Woodruff, Debbie Zorn, and Emily Ryan
   b. Support required: Time for electronic, phone, and face-to-face consultation, travel
time and/or expenses, etc.
   c. Key message: A key factor in E & A Center services is maintaining a productive and
   professional relationship with clients.

2. Assist clients in maintaining project/program support and funding through preliminary
   and follow-up services, including guidance with proposal procedures, data
   comprehension, etc.
   a. Person(s) responsible: Sarah Woodruff and Debbie Zorn
   b. Support required: Time for collaboration, creation, and dissemination of informative
   materials, tutorials, and questions/answer series, etc., time for providing feedback to
   clients who do seek our services, etc. Time for collaboration, creation, and
   dissemination of proposal procedures, examples of questionnaires/instruments, and
   data comprehensive explanations, etc., time for consulting with clients who have
   already utilized our services, etc.
   c. Key message: E & A Center staff provides assistance in all stages of project/program
   development.

Goal 3: Disseminate findings of research and evaluation through scholarly and popular
venues to enhance the professional knowledge base regarding STEM teaching and learning.

Target stakeholder audiences:
• the STEM teaching and learning community and practitioners
• policy makers
• the general public
• external funders
• education research and evaluation community

Intended outcomes:
• Improve mathematics and science teaching and learning professional development
• Create awareness of educational needs in mathematics and science education

Core strategies:
• Circulate significant evaluation, educational, and statistical findings from project data via
  professional papers, presentations, and other publications.

Communications Activities:
1. Produce and publish important educational and statistical data for all projects and programs evaluated and/or assessed.
   a. Person(s) responsible: Sarah Woodruff, Debbie Zorn, and Emily Ryan
   b. Support required: Time to collect, analyze and summarize project data, time to write, edit, and print reports, etc.
   c. Key message:

2. Share data via the E & A Center website, including project data and findings, client testimonials, questionnaires and testimonials, etc.
   a. Person(s) responsible: Sarah Woodruff and Debbie Zorn
   c. Key message:

Goal 4: Serve as a resource to P-20 educators for the improvement of STEM evaluation and assessment.

Target stakeholder audiences:
- School districts and personnel
- College and university faculty
- State and federal agency personnel
- Professional education organizations
- Professional development providers

Intended outcomes:
- Improve the understanding of evaluation and assessment in educational settings
- Promote the use of evaluation and assessment to gauge science and mathematics achievement
- Improve mathematics and science education teaching and learning

Core strategies:
- Provide professional development opportunities to school personnel
- Serve as a catalyst for graduate assistants working to earn degrees in mathematics and science education related fields
- Promote enrollment in higher education evaluation and assessment related fields (University of Cincinnati: Graduate Certificate Program in Assessment & Evaluation)

Communications Activities:
1. Work with teachers, principals, and administrators to provide evaluation and assessment services, as well as, professional development at the school district level.
   a. Person(s) responsible: Sarah Woodruff and Debbie Zorn
   b. Support required: Time for phone, electronic, and face-to-face consultation, time to identify needs and services to administer, follow-up time to share data collected, etc.
   c. Key message:

2. Provide assistantships and/or fellowships to graduate students in STEM education fields.
Goal 5: Increase the collaboration and knowledge sharing among Ohio’s college and university faculty, P-12 educators, professional development providers, and informal mathematics and science education groups.

Target stakeholder audiences:
- School districts and personnel
- College and university faculty
- State and federal agency personnel
- Professional education organizations
- Professional development providers
- Educational foundations

Intended outcomes:
- Reach a large range of education providers
- Create awareness of educational needs in mathematics and science education
- Improve mathematics and science education teaching and learning

Core strategies:
- Build alliances with educational organizations across a large spectrum (regional, district, state, and national)
- Maintain and increase affiliate faculty involvement at our Center
- Identify other evaluation groups across the state

Communications Activities:
1. Identify, manipulate, and increase ties to current affiliate faculty at Miami University.
   a. Person(s) responsible: Sarah Hayes, Debbie Zorn, and Emily Ryan
   b. Support required: Time for collecting information on faculty, time to review possible new faculty, cost of obtaining services from new faculty, etc.
   c. Key message:

2. Participate in projects/programs that are University-wide.
   a. Person(s) responsible: Sarah Woodruff, Debbie Zorn, and Emily Ryan
   b. Support required: Time for team to collaborate regarding ideas for expansion of website, feedback from existing clients, time with and cost of labor for working with University IT Services and web development groups, and external consultants
   c. Key message:

III. Products & Efforts Employed
IV. Measures of Feedback/Results to Date

1. Continued dissemination of PR materials has shown effective in spreading information about our Center—prestigious members of key funding sources have verbally expressed that they have seen and recognized our Center by its logo/emblem outside of our facility.

2. We have received requests from existing clients to allow them to disseminate our PR materials to potential clients seeking evaluation services as a referral. We also are aware of referrals that have taken place between existing clients to new clients.

3. To date, work is still underway on updating and expanding our Center’s website. Feedback/effectiveness cannot be measured at this time. We have, however, received valid feedback from outside sources of items to change and/or include on our website, as well as client testimonies to post on our website as visible evidence of our Center’s continued success and valuable services.

4. Knowledge of Design Software and Printing Procedures for public relations materials has prompted others in our Department to seek our counsel and newly found expertise on their projects and potential products.

5. Additional projects and project funding gained over the past six months equals: 3 brand new projects for our Center, with a total of over $500,000 in funding and 12 more possible projects either in the proposal stage or that are pending.

6. Larger knowledge base of new e-mail software programs has allowed us to advance our communication strategies with current and potential clients as a marking strategy.

7. Since acquiring new projects, we have been able to expand our list of instruments for collecting data that we also can disseminate and share with potential clients.
Case Analysis of Ohio’s Evaluation & Assessment Centers
Past and Present Organizational Structure

Overview of Case Analysis

This report summarizes observations of Ohio’s Evaluation & Assessment Center’s current organizational structure and communications practices/strategies. The summary includes a brief history of the Center, an analysis of the changes the Center underwent in 2008, the current structure of the Center, and recommendations for strategic placement of the Center in the future.

Purpose/Intent of Analysis

The purpose of this analysis was to learn more about a) how the Center was created; b) how the Center was structured at the time it was formed compared to now; c) how a change in leadership in 2008 as well as uncertain economic times affected the choices in organizational communication practices/strategies at the Center which ultimately ensured its sustainability between 2008 and 2012; d) what the current nature and culture at the Center is like (e.g., structure, management, leadership, personnel, products, language, values, habits); and e) where the Center is poised to go in the future as well as strategic moves for getting there.

In order to fully understand this analysis it is necessary to provide a brief history of the Center. Therefore, information about how the Center was created in 2003 is provided first.

Synthesis of Background Information

Birth of the E & A Center

Ohio’s Evaluation & Assessment Center for Mathematics and Science Education (Ohio’s E & A Center) was essentially born out of Ohio’s Statewide Systemic Initiative (SSI) Project Discovery (funded by the National Science Foundation and Ohio Board of Regents). Ohio’s SSI Project Discovery took place from 1991 to 1996 and focused on the reform of K-16 mathematics and science education through professional development efforts. Highly involved in Project Discovery’s SSI reform efforts was Dr. Jane Butler Kahle—the pioneer of the “birth” of Ohio’s E & A Center.

At the time of Ohio’s SSI efforts Dr. Kahle had been a science educator for over 36 years, was an international scholar in gender differences in science education, and had extensive experience in evaluating systemic reform of science and mathematics education. Toward the end of Project Discovery, around 1996, Dr. Kahle applied for and was awarded NSF-funding for a project entitled Bridging the Gap: Equity in Systemic Reform. The Bridging project, which ran until 2000, focused on evaluating and assessing all of Ohio’s SSI mathematics and science education reform efforts. After the Bridging project (around 2002) the Ohio Board of Regents instituted five regional Centers of Excellence in mathematics and science K-16 education in the state. Out of her experience with Project Discovery and the Bridging project, Dr. Kahle recognized the need to spear-head a state center devoted specifically to mathematics and science education evaluation and assessment. At the time, no such Center existed in Ohio and thus its creation would fill the niche for evaluation and assessment of mathematics and science education for the state.

Dr. Kahle’s vision was to create a Center that could provide agencies and institutions as well as the people involved in mathematics and science education with reliable and valid information concerning the outcome of their project efforts and activities. The Center, as a Center of Excellence on its own, was to exist as a third party entity (outside of OBR and the Ohio Department of Education) with the capacity to serve the evaluation, assessment, and research needs of the entire state (e.g., other Centers of Excellence, state agencies, mathematics and science education groups, institutions of higher education, local school districts). As a result, in 2003, Dr. Kahle submitted a proposal to the Ohio Board of Regents to fund Ohio’s Evaluation & Assessment Center for Mathematics and Science
Education. So it was out of the intuition and experience of Dr. Kahle, the support of many mathematics and science education collaborators (from across Ohio), and the financial leverage of the Ohio Board of Regents, that Ohio’s Evaluation and Assessment Center for Mathematics and Science Education was born.

Adolescence of the E & A Center

Between 2003 and 2006, with the leverage of the Ohio Board of Regents and the support of several additional National Science Foundation Mathematics and Science Partnership (MSP) grants, the Center transitioned into “adolescence.” During adolescence, the Center flourished and expanded into a self-sustained organization offering evaluation and assessment services to clients both locally and nationally; during this time the Center generated over $4 million in revenue from over 30 grants/projects. Between 2006 and 2008, the original founder of the Center retired and new Director was hired. This individual came into the Center with a background in academia, but held little experience executing administrative duties. During this time, the Center was stable and existing projects were maintained; however, little new money was obtained. Due to the extensive administrative requirements of the Director’s position, the individual who was chosen to take over for the original founder dismissed himself. The original founder came back to help run the Center as well as begin a new search for a new Director.

In Fall 2008, another new Director was hired. At this time, the Center entered into yet another transitional period—a period that consisted not only of managerial change but also of external environmental changes (e.g., social, political, economic, technological) which initiated internal structural and organizational reflection and change at the Center. Toward the end of 2008, several of the larger grants which had sustained the Center through adolescence were set to end, funds previously provided by the state since the Center’s inception also were being eliminated due to shifts in funding priorities at the state level; that is the Ohio Board of Regents (OBR) redirected its funding from the federal government to support to other state initiatives). As the environment around the Center shifted, the then new Director had to begin to reevaluate the Center’s place in its industry’s ecosystem. This process included self-reflection, environmental-scanning, adaptation and stream-lining of staff and costs, and strategies for expanding and branding the Center’s expertise. She had to assess the Center’s current state, its current staffing plan, surrounding competitors with the hope of transforming how the Center operated in order to situate it and its employees for continued survival and stability. Once the new Director had a clear understanding of “who” the Center was, what it had to offer, and where it needed to go she began to develop a new communications, staffing, and marketing plan. To follow is an in-depth account of the Center from 2008 to the present highlighting changes in organizational and communications practices/strategies over the past 5 years due to external environmental factors.

Case Study and Current Structure, Nature, and Culture of the E & A Center

Case Study

The organizational environment or network that the Center functions within includes Miami University’s School of Education, Health and Society, Miami University itself, local organizations (i.e., competitors, clients, partners, stakeholders), and even more broadly, the outside environment which includes state and federal governments under which we operate (i.e., funding agencies, local and national competitors). Because the Center is grant-funded, changes which occur at the state- and federal-levels typically trickle down and greatly affect the Center in some way. Figure 1 represents the organizational environment in which the Center is situated.
Figure 1. Organizational Environment Surrounding Ohio’s E & A Center.

Though the Center had been self-sufficient for over half a decade (from inception to 2008) the new Director recognized the need to adapt according to changing times. Because of how the Center was (and is) situated as well as the fact that funding from the Ohio Board of Regents was now gone, the new Director was faced with the task of adapting the Centers organizational and businesses strategies to sustain its future. She realized that the Center had to adopt an open-systems approach.

An open-systems approach encourages “… people, departments, or organizations to be mindful of the importance of the overall health of their industry ‘ecosystem’” (in Eisenberg, Trethewey, and Goodall, 2010, p. 82). This approach suggests that organizations do not exist as entities isolated from the rest of the world; rather they exist in an ever changing environment where a change at one level effects change at many other levels. According to Walter Buckley, when a system (or organization) acts in an “open” manner it not only “engages in interchanges with the environment,” it becomes aware of the interchanges as “an essential factor underlying the system’s viability, its reproductive ability or continuity, and its ability to change” (in Eisenberg et al., 2010, p. 82). So, naturally for an organization to succeed it must devote time and energy to environmental scanning which is “the careful monitoring of competitors, suppliers, government legislation, global economics, new technologies, political developments, and consumer preferences” (in Eisenberg et al., 2010, p. 81).

The Center’s adoption of an open-systems approach in 2008 required exploratory, transitional, and expansive stages, which included: a) researching other organizations with infrastructures, motivations, experiences, and expertise similar to its own; b) educating itself on what similar successful (i.e., financially stable) organizations were doing; c) evaluating its strengths and weaknesses; d) staying ahead of current shifts in social, political, economic, and technological changes; and lastly, e) adopting a new organizational structure and new business practices which would position the Center to become more competitive.
Part of the Ohio Board of Regents efforts to help each organization (i.e., Center) affected by budget cuts was to encourage them to position themselves for long-term self-sustainment. This process involved a public relations campaign of sorts to build a communications plan for self-branding and marketing purposes. The process for creating the communications plan involved many of the steps discussed above—research, self-reflection, adaptation, and growth (i.e., not necessary in staffing, but in skills).

The steps which the E & A Center took to create a communications “campaign” coupled with the new Director’s open-systems approach to running the business ultimately helped to sustain the Center’s future. Both actions combined helped the Center a) gain knowledge about the many environmental changes going on around it; b) understand which changes were affecting it most and which prompted or required change from within; and ultimately, c) recognize a need to adapt and grow in productive ways in order to survive and eventually thrive again as a grant-funded entity.

Current Organizational Structure

Though the Center’s entire history contributed to its current state, the events of the past 5 years mostly influenced its current organizational structure and climate. Currently, the Center functions using a mixture of Classical Management (i.e., top down/management-oriented approach to work) and Human-Relations Management (i.e., consideration of interpersonal and social needs of individuals approach to work).

Figure 2 represents the organizational structure of the Center in 2003 and in 2009. While both structures appear to have some sort of top-down hierarchy, the current (2009 and beyond) organizational structure at the Center is more lateral; meaning that all work completed at the Center is dependent on each employees contributions. Though all Center employees work under the Director, many are involved in decision-making regarding work at the Center. The Director frequently consults with employees for assistance and advice on many factors at the Center. The mixed-management at the Center is evidenced by the leadership style(s) of the current Director (i.e., situational and transformational) as well as findings from informal conversations with employees about power influences on their work behaviors at the Center.
Figure 2. Organizational Structure of Ohio’s Evaluation & Assessment Center in 2003 (left) and in 2009 (right).
Leadership Style

I believe that the E & A Center functions under two main types of leadership; that is, the current Director practices both situational and transformational leadership in order to maintain the integrity of the Center’s work and its employees.

Situational Leadership

Simply put, situational leadership involves a leader who displays a dominant style but who also is capable of behaving in other ways depending on the situation. Choices made under situational leadership are influenced or controlled by two types of concerns: concern for relationships (people) and concern for tasks (products). This type of leadership aligns with both types of management practiced at the Center: dominant leadership characteristics relate to classical management while flexibility or situational characteristics relate to human-resources management.

The current E & A Center Director practices effective situation leadership daily. She ensures the bottom line at the Center, which is to provide quality evaluation and assessment to clients (in the form of products such as research, instruments, reports, etc.). She also monitors and leverages the overall well-being of employees at the Center during the process (whether strenuous or mundane) it takes to produce work deliverables. For instance, as employees change in their readiness to complete work, the Center Director matches her leadership style to individual employee’s needs. Most often, she provides structure and opportunity for growth when employees are lacking in ability and preparedness; she provides support and guidance when employees are capable but not yet confident in their abilities; and she provides empowerment when employees have reached a high-level of ability which often times is marked by the reward of more decision-making responsibilities regarding work at the Center. This process also is suggestive of the second type of leadership practiced by the E & A Center Director—transformational leadership.

Transformational Leadership

Transformational leadership involves “inspired leadership, empowerment of employees, and (of late) strategic uses of new technologies” (Eisenberg et al., 2010, p. 256). Transformational leaders are characterized as visionaries who lead by example and who act as “change-agents.” This type of leader thrives on constant decision-making and on being in charge yet is conscious of the importance of instilling in others that decisions and actions are worthy of trust and confidence. Most importantly, this type of leader is equipped to “lead an organization through increasingly turbulent global business environment through the strategic use of communication” (Eisenberg et al., 2010, p. 255).

I believe the E & A Center has operated to some degree under this type of leadership since 2008. In 2008 the Center underwent uncontrollable loss of funds due to environmental economic changes. Also at that time, the Center hired a new Director (the current Director) as well as experienced the beginning of changes in staffing. The then new Director was instrumental in evolving the organizational structure, capacity, and stability of the Center into what it is today through transformational leadership. She stepped into a situation where great change was needed in order to sustain the E & A Center (e.g., in staffing, structure, and strategic placement in industry). She came into the Center with the ability to assess the current state of the Center, and with great confidence made strategic moves that not only kept the Center “alive” but also earned the trust of the majority of employees even amidst uncertain job security. Being an effective leader does not constitute managerial perfection though. There were a few employees during this time periods who either transferred to other departments within Miami or who were released from the Center. In each of these cases, individuals who voluntarily or involuntarily left the Center did so mostly due to: a) budget cuts because their skills were not aligned with the needs of the Center. And typically those who left the Center held a difference of opinion (from that of the Director) regarding how the Center should be managed and regarding its vision for the future.

Evidence of the leadership style(s) of the E & A Center Director as well as relationships between the Director and other employees could be seen through informal conversations with employees about the types of “power” that influenced and motivated their work behaviors.
Power-Relations

An informal study of the power-relations within the E & A Center was conducted. This study was completed based on the ideas of critical theory in organizational communication. Critical theory deals with investigating the power that organizations have over individuals (in this case, over individuals work behaviors). Early research conducted by Robert French and Bertram Raven (1968) described five types of social power: reward, coercive, referent, expert, and legitimate. French and Raven’s research on power-relations was based on a scenario where a “person A has power over person B when A has control over some outcome B wants” (Eisenberg et al., 2010, p. 140). For the sake of this study, I assumed the E & A Center Director represented person A, while each Center employee represented person B. Part of my informal study asked employees to rank each type of power (reward, coercive, referent, expert, and legitimate) from 1 (least influential) to 5 (most influential) based on how each type of power influenced or motivated their work behavior at the Center. A description of each power is provided in Table 1.

Table 1. Description of power-relations.

<table>
<thead>
<tr>
<th>Power Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reward power.</strong></td>
<td>Person A has reward power over person B when A can give some formal or informal reward, such a bonus or an award, in exchange for B’s compliance.</td>
</tr>
<tr>
<td><strong>Coercive power.</strong></td>
<td>Person A has coercive power over person B when B perceives that certain behaviors on his or her part will lead to punishments from A, such as poor work assignments, relocation, or demotion.</td>
</tr>
<tr>
<td><strong>Referent power.</strong></td>
<td>Person A has referent power over person B when B is willing to do what A asks in order to be like A. Mentors and charismatic leaders, for example, often have referent power.</td>
</tr>
<tr>
<td><strong>Expert power.</strong></td>
<td>Person A has expert power over person B when B is willing to do what A says because B respects A’s expert knowledge.</td>
</tr>
<tr>
<td><strong>Legitimate Power.</strong></td>
<td>Person A has legitimate power over person B when B complies with As wishes because A holds a high-level position, such as division head, in the hierarchy.</td>
</tr>
</tbody>
</table>

Findings from the study varied greatly. No one employee ranked the same type of power in the same order of influence (i.e., from 1 – least influential to 5 – most influential). Some types of power were ranked at the same level of influence; however in the majority of these cases similar rankings were only made by 2 of 6 employees. One type of power (legitimate) did receive the same ranking by 3 employees. Based on findings, I would conclude overall that each employee at the E & A Center is influenced or motivated to do work for different reasons. Further, I would suggest that even though half of the employees ranked legitimate power at the same level of influence on their work, a ranking of 3 (mid-level influence) does not suggest that employees do their work merely based on hierarchy of position or power at the Center.

Based on these findings regarding power-relations as well as observations of work-habits, it seems as though employees at the Center function mostly in work-teams. Applicable to the work of the Center and consistent with a human resources approach to management, “in team-based companies every employee is seen as possessing valuable knowledge that must be widely shared for the benefit of the whole” (Eisenberg et al., 2010, p. 211).

Dimensions of Teamwork – Roles

Based on my analysis, I believe that the nature of the work at the E & A Center demands a team-based approach. For instance, for a single project at the Center, several employees need to play a critical role in order for the project to be successfully implemented. That is, the Center consists of a group of employees primed with skills in a variety of areas who work together in a cross-functional exchange of information in order to complete work. For each project that the Center evaluates, there seems to be at least 6 key roles that need to be filled:

1. A Principal Investigator—this role is typically fulfilled by the Center Director and she is held accountable for overseeing that the evaluation work of the project is completed in a timely and efficient manner.

2. A Project Director—this role is typically fulfilled by a Research Associate who is responsible for actually conducting the evaluation activities of the project.
3. A Statistician—this role is fulfilled by a Statistician who is responsible for developing tools for data collection during project activities as well as synthesizing, analyzing, and reporting statistical findings.
4. A Fiscal Agent—this role is fulfilled by a budgetary staff member who is responsible for estimating the costs of the project as well as maintain and adjusting the project budget according to the project’s needs.
5. Support Staff—this role is typically fulfilled by the Center Coordinator who acts as a point of contact for the project in order to organize project activities and well as edit, design, and disseminate final project deliverables.
6. Graduate Assistants—this role is fulfilled by graduate assistants (i.e., students) who are responsible for helping to conduct research for the project as well as organize, enter, and process data collected from project activities.

I believe that the Center’s success in functioning under a team-based approach occurs for several reasons:

1. Employees are equipped with the knowledge and skills to do their part effectively and efficiently;
2. Employees have adopted a consensus that all of us are smarter than any one of us;
3. Employees function under multiplex relationships; that is, they communicate about work as well as personal life, and they are not afraid to express creativity or share new ideas for the future;
4. The Center fosters an environment that values and rewards team-work while also emphasizing and rewarding individual learning; and
5. The Center Director acts as a coach to employees rather than merely a high-level authority figure to maximize team performance.

Current Culture at the Center

The E & A Center has been (and continues to be) shaped by a) its 9-year history, b) its leadership, c) the state of its industry (i.e., external environmental factors); and d) the individual professional and personal characteristics of its active employee. To follow are a few examples of the Center’s current culture:

- **Language/Jargon:** Because work is dependent on state and federally funded grants employees share many of the same philosophies: heavy work-loads are positively classified as good “job security” and particularly frustrating work tasks are sarcastically classified as “opportunities.”
- **Daily Habits:** Because the Center is somewhat marked by human-relations management and consists of multiplex relationships among employees, key times during each day are marked by informal conversations and story-telling regarding personal life.
- **Rites/Rituals:** Because the Center is somewhat marked by classical-management employees are held accountable for their specific responsibilities and are expected to produce work in a timely and efficient manner.
- **Values:** Professionally, because of its team-based approach, the Center prides itself on the fact that it can manage multiple small and large scale projects at all times; additionally, it values projects that enhance the fields of mathematics and science education in some way. Personally, because of the human-relations approach, employees value the importance of “family” over work.
- **Artifacts/Accomplishments/Awards:** Because of the Center’s rich and extensive history, it houses a plethora of mathematics and science education evaluation artifacts: for instance, at any given time, work completed for a project produces evaluation and assessment designs, data collection instruments and protocols, technical, summative, and annual evaluation reports; and publications and presentations. Some of these artifacts are valuable because they can be used for future similar projects, while other artifacts are representative of the Center’s ability to provide outstanding mathematics and science education evaluation and assessment.
- **Staff Meetings/Performance Reviews:** Because of the complexity of and the often-times shifting nature (i.e., deadlines, budgets) of work done by the Center, monthly staff meetings are held to keep everyone on the same page. Because of the current staffing arrangement at the Center coupled with the heavy work-load of the Director formal employee performance reviews are not completed; work performance is based on the quality and efficiency of work created on a day-to-day and project-to-project basis.
As a whole, employees at the Center seem committed to their work while at the same time are conscious and mindful of their personal and professional relationships to other employees. All employees are focused on providing clients of projects with sound evaluation services. Employees also are open to expanding their skills which in turn builds on the Center’s scope and capacity. Work ethics and attitudes, of late, are born out of social, political, and economic environmental factors and have fostered a willingness to “think and act in new, synergistic ways” (in …, 2010, p. 226). Combined, these factors influence the reputation and will help to ensure sustainability of the Center. Based on these observations of the E & A Center, the concluding section of this report offers ideas for future strategic alignment in communications and organizational practices at the Center.

**Thinking Ahead: Possible Future Strategic Alignment**

Since 2008, the Center has made strides to position itself in such a manner that it can react to and adjust as needed to changing environmental factors (e.g., social, political, technological, etc.). Today, the Center continues to remain attuned to environmental factors while also thinking strategically about organizational alignment to help ensure the sustainability of its work. As the Center thinks ahead, it must continue to keep in mind what is going on in the industry around it. It must think critically about how environmental factors will affect 7 key areas regarding strategic alignment (Figure 3; Waterman, Peters, & Phillips, 1980).

The following and concluding section of this report discusses recommendations for how the E & A Center can monitor or adapt its communications practices and organizational structure based on each of the 7 key areas for strategic alignment.

![Figure 3. 7-S Model of Strategic Alignment.](image-url)
I believe the Center is amidst a transition from late-adolescence to full-maturity and would benefit from focusing their thinking on the following areas: a) reexamine internal communications strategies while expanding external communications strategies; b) streamline and enhance the processes for socialization of new employees; c) remain abreast to ways to stream-line work and cut costs; d) fine-tune employee’s skills and continue to develop new competencies; e) consider the qualities that will give the Center a competitive edge; and f) ensure that all employees and stakeholders are aware of the mission and vision of the Center.

Strategic Thinking – Staffing, Skills, and Shared Values

The Center is currently in the process of growing its staff. A part of the recent hiring process has involved the careful construction of job descriptions in which the skills of multiple persons are steam-lined into one potential employee’s position. These new positions demand skills of potential employees that if fulfilled could not only help to expand the capacity of the Center but also cut costs. In essence, filling the two new positions advertised by the Center would also help even-out the work-load of other employees. This could potentially allow more time for advances in education, training, and thorough strategic thinking regarding the Center’s future. Currently, nearly all active employees are in the process of earning higher degrees in areas related to work at the Center. The hope is that the Center can sustain its current work and gain new work while allowing each employee to pursue his or her educational interests and endeavors.

I fully endorse the continued encouragement of the Center Director to empower employees to advance their education and skill-sets. Though the Center is currently stable (financially) and staff members are able to joke about heavy work-loads, there is an underlying fear of external environmental factors stripping away the so-called “job-security” of every active employee. As such, each employee at the Center needs to remain aware of the requirements of today’s new social contract where “job security is fleeing and tied expressly to whether one’s skills fit the organization’s needs at that time” (Eisenberg et al., 2010, p. 19). Employees need to remain invested in earning higher degrees; attending workshops, training, seminars; reexamining their skills, there fit in the organization, and how to adapt or expand their skills to the Center’s mission and vision. In the recent past, the Center has proven that it can accomplish timely, quality work with just a few employees on board; enhancing current employee’s skill-sets and hiring several new employees with their own set of new skills would definitely positively affect the capacity of the Center.

Another area regarding staffing which the Center could benefit from improving is their new employee socialization process. Currently there is no formal or extensive process in place at the Center for familiarizing new employees with the mission and vision of the Center; its history, including past projects/work; how to navigate or join the Center’s cultural setting; or an informative tool-kit to help employees jump start their work. According to Eisenberg et al. (2010) “Typically, new employees have some difficulty performing their jobs and getting along with others until they reach a level of familiarity. Potential sources of useful information for newcomers include: (1) official company messages (e.g., from management, orientation programs, and manuals), (2) coworkers and peers, (3) supervisors, (4) other organizational members, including administrative assistants … and employees in other departments, (5) customers and others outside of the organization, and (6) the employee’s assigned tasks” (p. 125). The Center could help to ensure the professional and personal health of its new employees sooner, if it devoted more time to a more formal socialization process. Time given by current employees could help assimilate new employees more quickly.

A final area for recommendation is regarding the use of formal performance reviews with employees. The clarity of understanding between the Director and each employee of job responsibilities is invaluable. Fostering this understanding through devoting time to performance reviews could help to ensure the proficiency of work as well as the overall well-being of each employee. Additionally this time could be used by the Director to debrief each employee of the overall mission and vision of the Center, when appropriate.

Strategic Thinking – Strategy and Systems

The Center can ensure a successful future by adopting the following business strategies: 1) continue to practice an open-systems approach, including environmental scanning and marketing; and 2) think strategically about increasing capacity and efficiency. According to Inc.com true strategic thinkers need to practice 6 habits (Schoemaker, 2012):
• Anticipate: look for innovation going on in our industry and build an external network to help you with environmental scanning
• Think Critically: Examine the root of problems/issues, challenge current beliefs/mindsets (including our own)
• Interpret: avoid ambiguity by seeking patterns across multiple sources of data, test multiple hypothesis before developing a viewpoint
• Decide: avoid analysis paralysis by balancing speed, rigor, quality, and agility, don’t get hung up on perfection
• Align: as a leader, foster open dialogue, build trust, and engage employees and key stakeholders; think about what drives other people’s agendas, don’t avoid tough issues, assess risk tolerance, and follow-through
• Learn: extract lessons from difficult situations through honest and rigorous debriefings, shift course (quickly) if you’re off track, encourage celebration of success and well-intentioned failures to gain insights and learn

In 2003, when the founder of the Center recognized and acted on an unfilled niche in the education market for an evaluation and assessment center in Ohio, she was applying strategic thinking. Likewise, in 2008, when the then new Center Director suggested doing a thorough environmental scan of other similar business in mathematics and science education evaluation and assessment, she was applying strategic thinking. Both types of strategic thinking still apply today. The Center can continue to make conscious choices about unfilled niches and collect relevant environmental data. Currently the Center already practices several of these methods: a) it networks with other similar organizations to gain new work; b) it monitors moves by other competitors through informal social-networking, c) it is in the process of redesigning a more modern brand of products as well as of the Center’s website, and d) it actively promotes the Center’s services to potential stakeholders through University presentations, features in newsletters, and dissemination of findings through publications and at conferences.

The Center could benefit from additional marketing strategies in two major ways: 1) invest in new communication technologies (e.g., social networking and self-branding); and 2) concentrate on building competitiveness. In a time of continued changes in funding and sustainability, I believe the Center should focus on reminding clients as well as potential stakeholders why its expertise and services are superior to those of competitors. Possible ways for marketing the Center’s expertise and services is through social media and self-branding. To date, the Center does not seem to have a clear-cut statement about why potential clients should choose them over other competing businesses. This type of information was considered when the Center created a Communications Plan back in 2008; however, information from this plan could be stream-lined and used in other forms to help market the Center (i.e., on the Center’s new website or a new social networking page). The Center largely has not tapped many of the current popular business technologies. These types of technologies could help the Center could improve professional networking and efficiency of work (Adobe Connect, Skype, Dropbox, etc.) as well as provide avenues for creating a professional image or brand online (Facebook, LinkedIn, etc.).

*Strategic Thinking – Structure and Style (Leadership)*

On final area of improvement to foster forward thinking at the Center might be to more openly share leadership vision and expectations among employees. I believe the Director of the E & A Center has the experience and expertise to sustain the Center for many more years. Her management style is mindful of current economic factors as well as individual employee’s personal lives; her leadership style helps the Center to produce timely and efficient work that positively represents the Center, yet empowers others to reach their full potential by expanding their skills. However, the future of the Center does not rest solely in the Director’s hands; each active employee at the Center has a hand in creating a professional and productive culture at the Center. Each employee contributes a skill that is vital to the overall success of work at the Center and each employee has the ability to represent the Center in some way. After all, “Culture cannot be managed; it emerges. Leaders don’t create cultures, members of the culture do” (in Eisenberg et al., 2010, p. 118). As such, I believe the Center Director needs to continue to ask and likewise make sure that all employees work to help provide answers to the following questions: 1) What do we stand for? Why do we exist? What do we aspire to become; achieve; and to create?
References


Scorecard: Web Site Brand Action Review 3.0

A negative score for any of the eight questions indicates a likely problem that should be addressed, regardless of the overall total.

<table>
<thead>
<tr>
<th>Total score: 0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Range: -16 to +16</td>
</tr>
</tbody>
</table>

Company: ___________________________  URL: ___________________________
Evaluation by: ______________________  Date: _________________________
Browsers: ___________________________  Bandwidth: ______________________

Evaluated user goals
1. ___________________________
2. ___________________________
3. ___________________________

Each review question is scored on a scale of -2 to +2:
-2 Strong fail Two or more major problems, or one major problem and several minor problems
-1 Fail One major problem or several minor problems
1 Pass No problems found
2 Strong pass Best practice

1. Is the content that's required to support the specified user goals available where needed?

-2 There are several instances (or one major instance) where the content required to complete the specified user goals is not available where needed.
-1 There is one instance where the content required to complete the specified user goals is not available where needed.
1 All of the content required to complete the specified user goals is available where needed.
2 As above, plus content exceeds users' minimum needs, delivering added value.

Explain the findings that justify this score.

2. Is the functionality that's required to support the specified user goals available where needed?

-2 There are several instances (or one major instance) where functionality required to complete the specified user goals is not available where needed.
-1 There is one instance where functionality required to complete the specified user goals is not available where needed.
1 All of the functionality required to complete the specified user goals is available where needed.
2 As above, plus functionality exceeds users' minimum needs, delivering added value.

Explain the findings that justify this score.

© 2010, Forrester Research, Inc. All rights reserved. Forrester is a trademark of Forrester Research, Inc. Trademarks are the property of their respective companies.
3. Are menu category and subcategory names clear and mutually exclusive?
   - 2. There are two major instances (or one major instance and several minor instances) where category names overlap or are ambiguous.
   - 1. There is one major instance (or several minor instances) where category names overlap or are ambiguous.
   1. Category names do not overlap and are unambiguous.
   2. As above, plus names include trigger words related to the specified user goals.

Explain the findings that justify this score.

4. Does site content use language that's easy to understand?
   - 2. There are two major instances (or one major instance and several minor instances) where language is difficult for the specified users to understand.
   - 1. There is one major instance (or several minor instances) where language is difficult for the specified users to understand.
   1. All language is easy for the specified users to understand.
   2. As above, plus short sentences and paragraphs aid comprehension.

Explain the findings that justify this score.

5. Does the site use graphics, icons, and symbols that are easy to understand?
   - 2. There are two major instances (or one major instance and several minor instances) where graphics, icons, or symbols are difficult for the specified users to understand.
   - 1. There is one major instance (or several minor instances) where graphics, icons, or symbols are difficult for the specified users to understand.
   1. All graphics, icons, and symbols are easy for the specified users to understand.
   2. As above, plus the appearance of graphics, icons, and symbols saves space or time, or otherwise adds value to the display.

Explain the findings that justify this score.

6. Is text legible?
   - 2. There are several instances (or one major instance) where content required for the specified user goals is not easy to read.
   - 1. There is one instance where content required for the specified user goals is not easy to read.
   1. All content required for the specified user goals is easy to read.
   2. As above, plus the site allows users to change the text size.

Explain the findings that justify this score.
7. Are interactive elements easily recognizable?
   - 2. There are two major instances (or one major instance and several minor instances) where it's not clear which elements are interactive.
   - 1. There is one major instance (or several minor instances) where it's not clear which elements are interactive.
   1. All interactive elements are easily recognizable.
   2. As above, plus the placement and design of interactive elements is internally consistent.

Explain the findings that justify this score.

8. Does the site perform well?
   - 2. There are two major system errors (or one major system error and several minor system errors) while completing the specified user goals.
   - 1. There is one major system error (or several minor system errors) while completing the specified user goals.
   1. There are no major system errors while completing the specified user goals.
   2. As above, plus all screens load without noticeable delay.

Explain the findings that justify this score.

### SUMMARY

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Is the content that's required to support the specified user goals available where needed?</td>
<td>0</td>
</tr>
<tr>
<td>2. Is the functionality that's required to support the specified user goals available where needed?</td>
<td>0</td>
</tr>
<tr>
<td>3. Are menu category and subcategory names clear and mutually exclusive?</td>
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</tr>
<tr>
<td>4. Does site content use language that's easy to understand?</td>
<td>0</td>
</tr>
<tr>
<td>5. Does the site use graphics, icons, and symbols that are easy to understand?</td>
<td>0</td>
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<tr>
<td>6. Is text legible?</td>
<td>0</td>
</tr>
<tr>
<td>7. Are interactive elements easily recognizable?</td>
<td>0</td>
</tr>
<tr>
<td>8. Does the site perform well?</td>
<td>0</td>
</tr>
</tbody>
</table>

**Total score:** 0

Range: -16 to +16
# Social Media Client Benchmarking Template

Jonathan Briggs, the OTHER media  
February 2010 (draft v 0.1)

<table>
<thead>
<tr>
<th>Client</th>
<th>Date of Audit</th>
<th>Notes on purpose of audit</th>
</tr>
</thead>
</table>

This document is a work in progress but provides a framework for the collection of data as part of the creation of a social media strategy for a client. It has been published to encourage feedback from other digital professionals and to demonstrate to clients some of the thinking that is necessary to address properly their social media and web presence. If you use it in your own work or have suggestions for its improvement then please let us know.

We will be publishing further tools and articles regularly on [www.othermedia.com](http://www.othermedia.com).  
Follow us @othermedia and @jonathanbriggs

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## Which of the following exist for the business or brand?

<table>
<thead>
<tr>
<th>Presence</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Website</td>
<td>The purpose here is to establish a benchmark for the work they have done so far in establishing a web and social media presence.</td>
</tr>
<tr>
<td>Campaign microsites</td>
<td>An effective site, for example, should be supported by other channels.</td>
</tr>
<tr>
<td>Separate Blog or blogs</td>
<td>With over 350 social networks it is worth focusing at this stage on only the major players.</td>
</tr>
<tr>
<td>Facebook</td>
<td></td>
</tr>
<tr>
<td>Twitter</td>
<td></td>
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<tr>
<td>Youtube</td>
<td></td>
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<tr>
<td>Get Satisfaction</td>
<td></td>
</tr>
<tr>
<td>Other social networks (list)</td>
<td></td>
</tr>
</tbody>
</table>
## Reactions to and goals for social media

<table>
<thead>
<tr>
<th>Question</th>
<th>Reactions</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strengths and weaknesses of current web presence</td>
<td></td>
<td>These questions are all aimed at establishing whether their heart is really in it.</td>
</tr>
<tr>
<td>Social media goals?</td>
<td></td>
<td>Without the commitment from senior staff any attempts to improve the company’s digital strategy are likely to fail.</td>
</tr>
<tr>
<td>What companies do they admire for their social media/digital strategy success?</td>
<td></td>
<td>They need to see that social marketing is much more than just ticking the “have Facebook account” box and is linked to their marketing, PR, email and analytics activities.</td>
</tr>
<tr>
<td>Who has responsibility for social media in the organisation?</td>
<td></td>
<td></td>
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<tr>
<td>How will measure the impact of any changes they make?</td>
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<tr>
<td>What tools are in place to help with this measurement?</td>
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<tr>
<td>What are the senior staff reactions to tools like Twitter and Facebook?</td>
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<tr>
<td>Is there a culture of allowing staff to access social media during the working day</td>
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<tr>
<td>What is in place to help the company deal with adverse comment and discussion on social media sites now?</td>
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<tr>
<td>What are the email marketing processes in place for the organisation</td>
<td></td>
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</table>
List four major competitors

<table>
<thead>
<tr>
<th>Competitors</th>
<th>Web</th>
<th>Cam</th>
<th>Blog</th>
<th>Face</th>
<th>Twit</th>
<th>You</th>
<th>Get</th>
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</tbody>
</table>

Comments: Establishing who the competitors are and how well they perform on the web and socially will help establish benchmarks and goals for the company and the brand.
List key phrases that define how the company or brand would expect to be found in the search engines

<table>
<thead>
<tr>
<th>Key words or phrases</th>
<th>Demand</th>
<th>Visibility</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>These should be based on real needs as likely to be typed into search engines or expressed in. While brand terms are important, more than half of these should be generic market or industry terms.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Use one of the software tools available to assess demand.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Then assess how visible the client is for each of these terms. This will help the client understand more about their terminology and how far they have to go.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Check that their competitors really are their competitors in terms of these terms.</td>
</tr>
</tbody>
</table>

Notes on competitors
Website

Repeat for campaign microsites and blogs. Collect screen grabs (for later annotation) to illustrate each of the features explored. Use appropriate analytics tools to capture the data automatically. Repeat for well performing competitors.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Website</th>
<th>Campaigns</th>
<th>Blog</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assess the visibility of the website</td>
<td></td>
<td></td>
<td></td>
<td>How well is the current site positioned in the market?</td>
</tr>
<tr>
<td>Look to see if it has been structured around landing pages</td>
<td></td>
<td></td>
<td></td>
<td>Landing page design makes it easier to link from campaigns</td>
</tr>
<tr>
<td>Perform standard SEO checks: content layout, titles, tags, urls</td>
<td></td>
<td></td>
<td></td>
<td>Look for barriers to visibility and natural reputation (search)</td>
</tr>
<tr>
<td>Test out visitor journeys</td>
<td></td>
<td></td>
<td></td>
<td>Make sure that different types of visitors are supported</td>
</tr>
<tr>
<td>Look at how regularly it is being updated</td>
<td></td>
<td></td>
<td></td>
<td>Look for evidence of a content plan</td>
</tr>
<tr>
<td>Notes on competitors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Facebook

<table>
<thead>
<tr>
<th>Feature</th>
<th>Notes</th>
<th>Competitors</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assess the presence of the company or brand on Facebook</td>
<td></td>
<td></td>
<td>Is there are official or unofficial presence? Has it been thought through?</td>
</tr>
<tr>
<td>Look for staff involvement with Facebook</td>
<td></td>
<td></td>
<td>Many companies will have a poor presence while their staff are active on Facebook</td>
</tr>
<tr>
<td>Look to see how well they use Fan Pages</td>
<td></td>
<td></td>
<td>Fan Pages provide powerful tools for developing a brand presence</td>
</tr>
<tr>
<td>Links to company or brand site</td>
<td></td>
<td></td>
<td>How is Facebook being used to drive traffic to the main web presence?</td>
</tr>
<tr>
<td>Record numbers of fans</td>
<td></td>
<td></td>
<td>Make a note of the current numbers of fans</td>
</tr>
<tr>
<td>Last time their Facebook presence was updated</td>
<td></td>
<td></td>
<td>Make a note of the date when an update was made to the page (by the company)</td>
</tr>
<tr>
<td>Specific Facebook apps or automation</td>
<td></td>
<td></td>
<td>List any evidence of the use of apps by the company</td>
</tr>
<tr>
<td>Fan us on Facebook on site</td>
<td></td>
<td></td>
<td>Links from site to Facebook are important</td>
</tr>
</tbody>
</table>
Twitter

Use Twitter Analytics tools to measure how well they are doing compared with their competitors.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Notes</th>
<th>Competitors</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biography and background</td>
<td></td>
<td></td>
<td>Does this help set out the goal of the company?</td>
</tr>
<tr>
<td>Styles of tweets: Publishing</td>
<td></td>
<td></td>
<td>Pushing data</td>
</tr>
<tr>
<td>Questions</td>
<td></td>
<td></td>
<td>Asking for information</td>
</tr>
<tr>
<td>Signposting</td>
<td></td>
<td></td>
<td>Helping their followers</td>
</tr>
<tr>
<td>Conversation</td>
<td></td>
<td></td>
<td>Engaging their followers</td>
</tr>
<tr>
<td>Links to company or brand site</td>
<td></td>
<td></td>
<td>How are they driving traffic back to their site?</td>
</tr>
<tr>
<td>Number of followers</td>
<td></td>
<td></td>
<td>Record as baseline</td>
</tr>
<tr>
<td>Influence</td>
<td></td>
<td></td>
<td>How influential are they likely to be</td>
</tr>
<tr>
<td>Reach</td>
<td></td>
<td></td>
<td>How many people can they reach through their followers?</td>
</tr>
<tr>
<td>Recency</td>
<td></td>
<td></td>
<td>How often are they tweeting?</td>
</tr>
<tr>
<td>Follow us buttons on site</td>
<td></td>
<td></td>
<td>Needed to drive fans</td>
</tr>
<tr>
<td>Retweet buttons next to content</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Blogs and comments

<table>
<thead>
<tr>
<th>Feature</th>
<th>Notes</th>
<th>Competitors</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>How are they monitoring reactions to their organisation or products on blogs or posted in comments?</td>
<td></td>
<td></td>
<td>Blogs are some of the most powerful drivers of both community and reputation.</td>
</tr>
<tr>
<td>Is the company participating in responding to comments?</td>
<td></td>
<td></td>
<td>Bloggers are likely to talk about a successful company or its products and the client will want to be involved with this process.</td>
</tr>
<tr>
<td>Who are the powerful bloggers in their industry?</td>
<td></td>
<td></td>
<td>They may want to set up their own blog to be more in control.</td>
</tr>
<tr>
<td>Does their own blog or presence on services like GetSatisfaction help them provide a place for customer discussion?</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
## Actions

This is simply a list of some of the actions that the client may need to consider.

<table>
<thead>
<tr>
<th>Action</th>
<th>Notes</th>
<th>Priority (1-5)</th>
<th>Deadline</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define social media guidelines and plan for the company</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve Facebook presence</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Define fan acquisition strategy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve Twitter presence</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Define follower acquisition strategy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improve blogging sites and comment processes</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Define YouTube strategy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Set up social monitoring software and processes</td>
<td></td>
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<td></td>
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<tr>
<td>Define calendar of social activity</td>
<td></td>
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<tr>
<td>Define internal staff roles for social marketing</td>
<td></td>
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<tr>
<td>Define role with agencies to support activities</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Link social activities to defined KPIs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Define how company will respond to criticism</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Competitor Org/Businesses</td>
<td>Website</td>
<td>Blog</td>
<td>Facebook</td>
<td>Twitter</td>
</tr>
<tr>
<td>--------------------------</td>
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<td>------</td>
<td>----------</td>
<td>---------</td>
</tr>
<tr>
<td>Scripps</td>
<td>Modern website that incorporates videos, links and social media platforms on it. The site contains a lot of pertinent information that is easy to access through the many different tabs that can navigate a client to whatever product that they may need and additional information that they might be interested in. It appears as though they have two websites with similar content but one looks more modern and might be what they are currently building for an update.</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>VLPA</td>
<td>Very good website that looks good and is very easy to navigate with a lot of content. Very strong social media presence with links to Twitter, Facebook, Youtube, LinkedIn and several other blogs. This is a great use of social media and should be looked at as a possible guide for E&amp;A.</td>
<td>An excellent blog that has posts written by satisfied customers, employees and anyone that is happy with their affiliation with VLPA. Updated every regularly with at least 4 blogs per week and they all the posts have different context but are tagged so that anyone could search for particular things on the blog and find related articles. It also appears that people are reading these blogs because most of the blogs have comments in the comment section so this shows that people are reacting to what is being said.</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>NTC</td>
<td>NTC has a clear, concise (modern) website. Their site includes relevant photographs or pictures of education-based activities (i.e., students/teachers in classrooms, teachers in other professional settings, teachers engaging in PD and conversation; students who look excited to learn, etc.). Additionally they include informational graphics such as their 'theory of action' for improving teacher practices and teaching and learning.</td>
<td>Their blog is an extension of their website and is more geared towards providing articles about different topics (success stories, induction, teaching conditions, comments). This blog is infrequently updated with gaps in articles often being a month long. This would be an effective tool if it was utilized on a regular basis more.</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

E & A Center Org/Businesses to Research

Scripps is creating a strong buzz around itself by having a week long period in early September when 35 of the people that like their Facebook page were talking about it which is a little more than 30%. Their most popular age group is 25-34 but the majority of people that like them are actually other organizations on campus. This can be good for spreading the word through each of the organizations but doesn’t effectively spread word to the individuals they are trying to meet. Most of their posts are related to social security, the election and healthcare and they are posting them quite frequently. The one problem that they seem to have is the older demographic they are trying to reach is far less likely to be on Facebook and thus a strong social media presence isn’t important.

VLPA has 223 followers and over 400 tweets. They are mainly using the tweets to interact with different organizations on the Ohio campus. Additionally they are posting relevant articles that they are also posting on their Facebook page. It appears that the majority of their followers are also related to the organization in some way and they aren’t necessarily reaching out to new people. They have a well established YouTube page but it is rarely updated. They have been up since 2007 but only have about 15 videos with equates to only 2-3 videos per year. Most of the videos are watched under 100 times so they are not making a huge impact but it is good that they have the videos. The videos appear to be about the projects they are working on and highly relevant to someone that might be looking to utilise their service.

NTC also offers videos for each of their primary user categories (e.g., beginning teachers “voices video”). This video is about 5 minutes long and includes: students in the classroom, teachers in the classroom working with students, teachers talking about the importance of their mentors, reps from agencies that fund improvements to teaching and learning, NTC trained mentors, school district administration, and an appearance by NTC’s CEO. Brand placement is directly present as well as subtle at times, in one camera shot you could see NTC written on the back of a mentor’s shirt as she was participating in a teacher’s classroom; in another shot a district admin was praising NTC for improving their new teacher turnover rate; in another shot a teacher was talking about how her NTC mentor taught...
E & A Center Website
Navigation/Usability Testing Questions and Results

1. Assume you had a project that The Center could potentially help with, how would you go about getting more information about how they could possibly help you (if they find the “request for services” form versus just the contact page – ask them if they would actually take the time to fill it out and submit it)
   a. starts on home page, goes to either projects or services to get more help -- clicks on projects; on the projects pages, looks like it’s not to get help but instead it is already things that are in the works; next, clicks services --- then clicks the click here to complete a request for services; would print it out or fax it in
   b. 1:18
   c. starts at contact and location page in order to get a number or email that she could call - dr. woodruff’s information and finds location on campus and directions; would either email the director or visit the actual building
   d. :44
   e. from home page, clicks on the projects tab and scrolls down to find out that those are projects that already happened; next, clicks on the resources tab, finds the E&A Center project websites’ links the funding agency websites that might be able to provide support; if she didn’t find her information their, she’d go to the contact page and contact them directly
   f. 1:12
   g. Went straight to the services form. Projects and services to see what they could do. Resources page. Yes would actually take the time to fill out the form. Really great that he can just type straight onto the form makes him willing to fill it out.
   h. :9
   i. first read about the center on the home page, then go to projects, read through specific projects
   j. :32

2. Locate information about a past case studies which provides results from previous clients?
   a. starts on home page -- clicks on projects -- looks like past cases that the Center has completed; clicks on more information from a project
   b. :22
   c. clicks on projects - finds past projects; notices PDF links to click on for more information
   d. :17
   e. from the home page, clicks on papers & presentations, thinks that these will have past papers from clients; does not find any information on that tab that she needs, it’s just naming off associations; next, clicks on the resources tab, finds the project websites she might be able to go to; if that doesn’t work, she goes to the projects page and finds the PDFs of past projects
   f. 1:19
   g. Would go to projects page and click on each of the stuides.
h. :15
i. Goes to papers and presentations, but no links. Moves to resources. Doesn’t find anything so went to services. Re-ask the question. Goes back to projects. Doesn’t take the time to read all of the information so it was difficult for him to find it.
j. 1:24

3. Find the director’s email address
   a. goes to staff - then sees email address under director
   b. :7
   c. again, clicks on contact & location
   d. :5
   e. clicks on the staff page and finds it
   f. :10
   g. went to staff and found it
   h. :5
   i. went to contact and thought he found it. Found general email. Then navigated to staff.
j. :6

4. Find E&A’s phone number
   a. clicks on contact and location
   b. :7
   c. finds it on the contact page
   d. :3
   e. clicks on the contact page
   f. :6
   g. contact and location page
   h. :3
   i. Went back to contact and saw office phone number.
j. :11

5. Name a service we offer.
   a. clicks on services -- scrolls through bottom and then selects information from second paragraph; suggests making information bold; long text
   b. :22
   c. clicks on the services tab -- begins to read through text; begins naming off a few of the services that are further down on the page
   d. :38
   e. clicks on the services page, would read through “it is a lot of text on here. i wish it just had the services bullet pointed because i don’t really want to read all of that. i guess if i was really interested in the services i would have to read all of that”
   f. :16
   g. services page. wish there was a more bulleted point of view. something he can read quickly. A lot of text he doesn’t understand.
h. :12
   i. Clicks on services. Doesn’t like how much you have to read. Found specialize in
6. Locate the types of national science foundation projects we offer
   a. clicks on projects -- sees “NSF” and would click on that project to learn more about it; suggests to spell out national science foundation
   b. :19
   c. clicks on the projects tab -- scrolls down -- doesn’t see national science foundation anywhere (doesn’t notice NSF); clicks on papers and presentations tab -- clicks on resources --- clicks on the national science foundation’s link to their website
   d. :56
   e. clicks on the projects tab and would click on one of the PDFs; doesn’t specifically notice NSF
   f. :27
   g. Project page...can’t specifically find the NSF. Maybe split from case studies
   h. :18
   i. Projects page. Saw case studies.
   j. :9

7. Locate the types of Ohio Department of Education projects
   a. starts on projects page --- looks at the funding agency listed; again, suggests we spell out information; organize the programs based on relevance
   b. :13
   c. again, clicks on the link of ODE that’s on the resources page
   d. :14
   e. clicks on projects, sees all the projects listed, not quite sure what they mean or how they are classified
   f. :34
   g. Went to resources page...was confused.
   h. :17
   i. Would look on projects page. Figured out that ODE was Ohio Department of Education. Assume that is what we are talking about.
   j. :16

8. Does The Center offer help with instrument/survey development?
   a. clicks on services - finds information within the third paragraph; again suggests bolding because has to read through large blocks of text
   b. :28
   c. clicks on services - looks for keywords within the text; remembers seeing “instrument” within the text from a previous question; finds ‘instrument’ in the third paragraph - confirms the answer is yes
   d. :39
   e. goes to the home page, wants to have a search bar that she can search the website through; scrolls through the information on the website; looks under center expertise and services section on the home page but doesn't find the information she needs; sees “assessment instruments” on the very bottom of the
9. Can you access funding agency websites via a page on the E&A website? (resources tab)
   a. clicks on projects first --- no link to the sites; clicks on resources because he hasn’t been to the page yet; finds the links on the resources tab
   b. :23
   c. clicks on the resources tab and finds the links to the national funding agency websites
   d. :16
   e. clicks on the resources tab, because she thinks a funding agency would be considered a resource and finds the info
   f. :21
   g. found it fairly quickly on the resources page
   h. :9
   i. Navigates back to resources. Remembers seeing it there. Confusing because resources doesn’t automatically think other companies.
   j. :13

10. Find a link to the OARS website?
    a. clicks on the resources tab -- can’t find it but knows that’s where it should be
      i. information needs to be added
      ii. consider creating a dropdown menu that they can sort the long list of links by
    b. :32
    c. starts on the resources, doesn’t see it within the resources tab so decides to scroll through the list a second time --- leaves the resources tab and goes to the project tab
    d. :57
    e. he would go to the resources page
    f. :12
    g. searches resources page
    h. :19

11. does the E&A center ask for the title of your proposed project when requesting services?
    a. starts on the services tab, scrolls through the text, isn’t sure that the information will be on that page; goes to the contact page instead; doesn’t find information there; goes to the home page --- clicks the ‘click here to complete the request for services form’
    b. :42
    c. clicks on the services page and clicks on the request for services form
d. :32

e. opened the request a service PDF
f. :17

g. Services tab. Opens the PDF. Finds it.
h.:28

How long does it take them to find certain information?