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AUTHOR Cooper, Edward M.; Gackenbach, Rusty
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ABSTRACT

The level of awareness, knowledge, and current practices regarding strategic marketing within institutional research (IR) offices were studied for colleges in the Rocky Mountain region. Of the 18 responding offices, 9 indicated that their institutions utilized a marketing approach to planning. Of these 9 offices, 56 percent reported formal utilization of the marketing approach to institutional planning, while 44 percent reported informal or partial usage of this approach. Marketing functions were scattered throughout the institution with little reported integration as a whole marketing or strategic marketing system. The findings also indicated that IR offices were not performing many of the strategic marketing functions that can be readily assimilated. Indications were found that most IR personnel are not familiar with the basic terminology used in marketing (and business in general). The possibilities of incorporating a strategic marketing focus within the domain of institutional research are addressed. It is suggested that a strategic marketing model be followed and that IR offices be involved in the development and evaluation of: promotional strategies; product/service opportunities, pricing strategies, distribution strategies, and internal and external environment changes and projections. (Author/SW)

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**STRATEGIC MARKETING EVALUATION:
A FOCUS AREA FOR INSTITUTIONAL RESEARCH**

Edward M. Cooper, Ph.D.
Associate Professor of Marketing
Metropolitan State College
Denver, Colorado

Rusty Gackenbach
Research Associate
Metropolitan State College
Denver, Colorado

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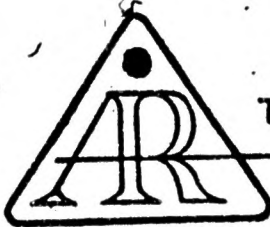
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D. R. Coleman, Chairman
Forum Publication
Advisory Committee

ABSTRACT

This paper has attempted to provide a fourth perspective on the role of institutional research other than that of problem identifier/information provider, data collector/manipulator, or resource agency. As evidenced in discussions of strategic marketing, institutional researchers currently lack some of the basic knowledge of strategic marketing terminology. Furthermore, while higher education institutions are participating in various strategic marketing areas, I.R. offices carry out only a few of these functions while they should be aiding the institution to strategically position itself for the marketplace of the future. This can be achieved by working the strategic marketing model and expanding the purview of I.R. to include development and evaluation of:

- promotional strategies,
- product/service opportunities and problems,
- product/service pricing strategies,
- product/service distribution strategies, and
- internal and external environment changes and projections.

STRATEGIC MARKETING EVALUATION: A FOCUS AREA FOR INSTITUTIONAL RESEARCH

Introduction

The discipline of institutional research (hereafter, I.R.) has grown from institutional need for self study, basic reporting of information, and institutional self-preservation. In the growth stages of I.R., professionals in the field have incorporated many of the then-popular ideas to be the work of I.R. In one of these areas lately incorporated (in a formal way) into the I.R. repertoire, institutions and researchers may have located a broadening and long standing role for I.R. This area is marketing and more specifically this paper proposes that strategic marketing should become a focus for I.R.

To explore the possibilities of incorporating a strategic marketing focus in offices of institutional research, this paper defines strategic marketing processes in brief and then presents data from two studies that explored the marketing and strategic marketing activities being carried out by higher education institutions and I.R. offices. The paper concludes by summarizing the marketing activities that I.R. offices are generally involved in and those with which they should be involved.

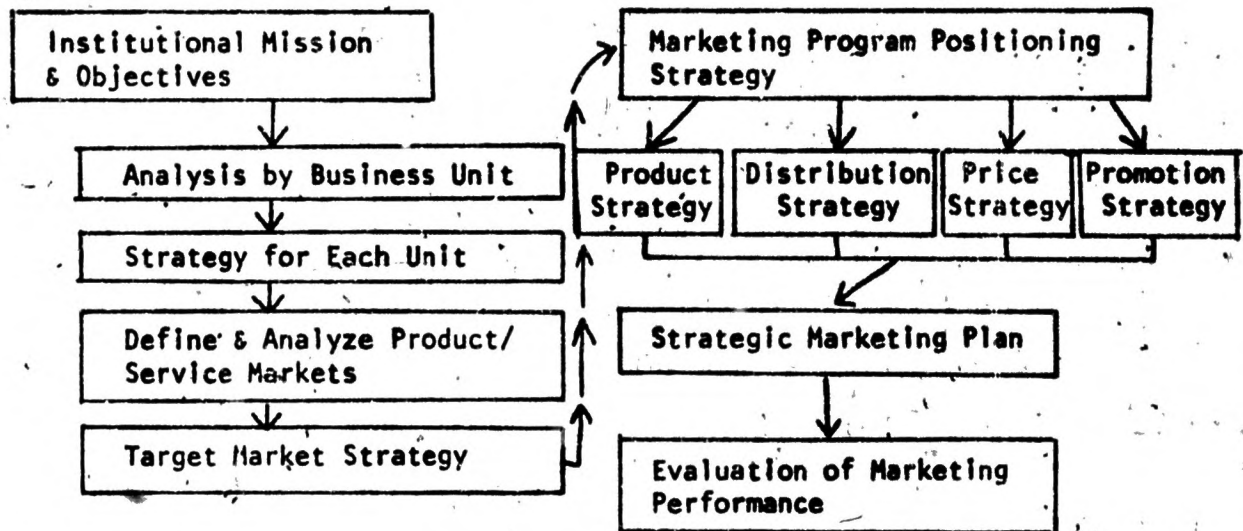
Background

Strategic Marketing

Strategic marketing as defined by Cravens (1982) is a process consisting of a series of logical steps as shown in Figure 1 on the following page.

I.R. offices are involved with many of the functions considered under marketing, strategic marketing, strategic planning but as practiced in higher education it is doubtful that the data is ever integrated so as to fit a strategic marketing process. Another function in strategic planning--strategic

FIGURE 1.

THE STRATEGIC MARKETING PLANNING PROCESS

analysis--requires that current financial and marketing performance in product and service areas served by the institution be assessed and that future opportunities and problems be evaluated. Location of these markets and product opportunities is also part of the strategic marketing process. A key to the strategic marketing process operating in higher education is the necessity to evaluate and set objectives for individual units within the college/university. Again, some I.R. offices are involved in these activities but normally only to extract data for other offices.

Research on Marketing in Higher Education

Marketing of higher education is an area that has attracted a limited number of studies. The premier attempt to ascertain what marketing activities are evolving in these institutions is the Marketing Index for Higher Education (Scigliano, 1982.) The preliminary results of this study indicate that there was somewhat less than formal integration and control of the major marketing

functions and less than satisfactory coordination and cooperation among the offices involved in the various marketing processes. Furthermore, it appeared that those individuals responsible for marketing functions worked amicably with other college personnel in research, program development, purchasing, and finance, although each department tended to serve its own power interests.

As to the extent of strategic marketing planning, the results indicated that administration did little in the way of strategic market planning. Regarding the quality of current marketing strategy, the study results showed that current strategy was clear but represents a continuation of traditional strategy. The study results additionally indicated that the marketing resources were somewhat less than adequate and that administration was not employing the resources in an optimal fashion.

The study further revealed that administration takes a long view of its delivery system although the bulk of its efforts goes to selling the immediate students. Administration does not fully maintain a whole marketing system view (supplies, delivery systems, competitors, customers, environment) in planning its programs. According to Mr. Scigliano's research, the universities included in the study did as well as corporations in the business sector, except in the area of strategic planning.

With this in mind, an exploratory study was conducted to ascertain more specifically the level of awareness, knowledge, and current practices in strategic marketing within I.R. offices and the institutions they serve.

Methodology

Sample

Twenty I.R. offices were selected randomly from the Association for

Institutional Research directory and the population was limited to an area sample of the six state Rocky Mountain region. The sample drawn included ten state colleges/universities, six junior/community colleges, and two private colleges. Actual respondents were A.I.R. members and were administrators of their various offices.

Questionnaire

The questionnaire was developed for use in a telephone survey of the area sample and was structured to test both the activities in the institutions and I.R. offices as well as the respondent's knowledge of the strategic marketing terminology. The questionnaire was pretested and revised prior to conducting the exploratory study.

Results

Responses were obtained from 18 of the 20 I.R. offices contacted and half of these institutions reported that their institutions utilized a marketing approach to planning. However, only 56 percent of those answering in the affirmative reported formal utilization of the marketing approach to institutional planning, while 44 percent reported informal or partial usage of a marketing approach to institutional planning.

It would appear that a marketing approach to institutional planning has not gained a widespread acceptance by institutions of higher education in the Rocky Mountain region. However, these results compare very closely with the results reported by Mr. Scigliano in his national survey.

How long has your institution utilized a marketing approach to institutional planning?

The respondents were queried as to how long their institution had

utilized a marketing approach to institutional planning. The respondents' answers ranged from one to six years with an average of a little more than three years.

The results show that a marketing approach to institutional planning is a rather recent phenomenon as reported by the institutions currently implementing said approach.

Is your office involved in market planning?

The institutional offices which were contacted for this study were classified as an office for institutional research or an office for academic planning and development. Of the nine offices which reported utilization of a marketing approach to institutional planning, all nine (100 percent) reported that their office was involved in the market planning process. However, 67 percent of these offices stated that their office was only indirectly or partially involved in the market planning process.

The results appear to indicate that I.R. offices are not adequately involved in the marketing planning process, and the offices are the ones with the data base to implement marketing planning.

Which of the following processes are carried out at your institution?

Each of the nine respondents who acknowledged use of a marketing approach to institutional planning were asked whether certain marketing processes were applied to institutional planning at their institution. Furthermore, the respondents were asked if their office (institutional research) was involved in the particular process. The processes involved in the study are as follows:

1. Define product and market scope. 88 percent of the respondents reported that their institution performed this process. However, only 25 percent of the 8 I.R. offices reported involvement with the process.

2. Define product and market segmentation. 88 percent of the respondents reported utilization of this process at their institution. 37 percent of the 8 I.R. offices reported involvement with the market segmentation process.
3. Determine sales growth. 77 percent of the respondent reported that their institution performed this process. It was reported that 57 percent of the I.R. offices were involved in determining sales growth.
4. Determine market share. 33 percent of the respondents reported that their institution carried out this process. Of the I.R. offices, all of them (100 percent) reported that their office was involved in determination of market share.
5. Determine return on investment. 55 percent of the respondents reported that their institution utilized this process. However, 40 percent of the I.R. offices determined return on investment.
6. Determine net income. 88 percent of the institutions reportedly carried out this process. 25 percent of the I.R. offices reported being involved in determining net income.
7. Formulate marketing strategy. 88 percent of the institutions responding reported usage of the process at their institution. 37 percent of the I.R. offices reported that their office was involved in formulating marketing strategy.
8. Formulate research and development strategy. 77 percent of the respondents reported utilization of this process at their institution. 71 percent of the I.R. offices reported that their office was involved in formulating research and development strategy.
9. Formulate service strategy. 88 percent of the institutions responding to this question reported that their institution carried out this process. 37 percent of the I.R. offices reported being involved in the formulation of a service strategy.
10. Formulate advertising strategy. 88 percent of the respondents reported utilization of this process at their institution. However, 12 percent of the I.R. offices reported involvement with the formulation of advertising strategy.
11. Formulate distribution strategy. 77 percent of the institutions reportedly carried out this process. Again, only 14 percent of the I.R. offices reported that their office was involved with formulating a distribution strategy.

The current data tends to support Mr. Scigliano's findings that the current strategies utilized by I.R. offices represent a continuation of

traditional methodology as opposed to a formal marketing approach.

Does your institution utilize strategic market planning?

Only the institutions who reported utilization of a marketing approach to institutional planning were asked this question, and 67 percent of the institutions reported utilization of strategic market planning. Strategic market planning, it would appear, is currently practiced by a minority of institutions in the Rocky Mountain region. These results also concur with the national results of Mr. Scigliano's research.

How long has your institution utilized strategic market planning?

The respondents reported usage of strategic market planning ranging from one to four years with an average of a little more than three years. The data shows that strategic market planning is a rather recently developed process as reported by those institutions who currently implement the process.

① Is your office involved in strategic market planning?

Of the institutions which reported utilization of strategic market planning, 50 percent of the I.R. offices reported involvement with the strategic market planning process. Once again, the results appear to indicate that I.R. offices are not being used to their best advantage in the strategic market planning process. Marketing, it appears, has not expanded the scope of what I.R. offices do in an appreciable way.

In your opinion, has a marketing approach been beneficial to institutional planning at your institution?

Of the institutions which reported utilization of a marketing approach to institutional planning, 56 percent reported that a marketing approach has been somewhat beneficial to institutional planning. Forty-four percent of

the respondents reported that a marketing approach was very beneficial to institutional planning.

The data indicates that those institutions reporting utilization of a marketing approach to institutional planning have found the approach to be at least somewhat beneficial to institutional planning, at their institution.

In your opinion, would a marketing approach be beneficial to institutional planning at your institution?

Of the institutions who reported that they did not utilize a marketing approach to institutional planning, only 11 percent reported that a marketing approach would be not at all beneficial to institutional planning. Thirty-three percent of the respondents reported that a marketing approach would be somewhat beneficial to institutional planning. Forty-four percent replied that a marketing approach would be very beneficial to institutional planning, and 11 percent said that a marketing approach would be extremely beneficial to institutional planning.

The results show that there is a belief among institutions not currently practicing a marketing approach that the approach would be beneficial to institutional planning at their institution.

Conclusions

The conclusions of this study (although limited by the size of the sample) indicate more formal marketing by the institutions surveyed is a possibility in the future with 25 percent of the colleges/universities already involved in marketing activities. But, formal marketing is a relatively new area of concern for I.R. offices ($\bar{X} \approx 3$ years). As expected, marketing functions are scattered throughout the institution with little reported integration as a whole marketing or strategic marketing system. The data also

shows that I.R. offices are not performing many of the strategic marketing functions that could be readily assimilated in their purview.

Furthermore, the telephone survey found indications that most I.R. personnel are not familiar with basic terminology used in strategic marketing (and business in general).

Recommendations

Strategic marketing is by no means a panacea for all that ails higher education or institutional research. But the process of integrating formal marketing activities and exploring areas of opportunity and potential problems known as strategic marketing can serve as a focus for I.R. activities.

Paul Dressel (1971) has given us three perspectives of institutional research:

1. The "sanitized view" of the researcher as a problem identifier and information provider who stimulates the institutional conscience;
2. I.R. as the collection and manipulation of data to meet the demands of the allocation process; and
3. I.R. as a resource agency assisting and coordinating the research of others.

Dressel suggests that I.R. was moving in the direction of the third perspective, the resource agency, during the 1970s. In reality, the unseen pressures of the past decade and the present have forced I.R. into Dressel's second category at most institutions--a collector, manipulator, and report generator.

This paper has attempted to provide a fourth perspective on the role of I.R. As evidenced in the previous discussion of strategic marketing, institutional researchers currently lack some of the basic knowledge of strategic

marketing terminology. Furthermore, while higher education institutions are participating in various strategic marketing areas, I.R. offices carry out only a few of these functions.

Rather than continue to act only as a technical resource agency or data generator, I.R. should be aiding the institution to strategically position itself for the marketplace of the future. This can be achieved by working the strategic marketing model and expanding the purview of I.R. to include development and evaluation of:

- promotional strategies,
- product/service opportunities and problems,
- product/service pricing strategies,
- product/service distribution strategies, and
- internal and external environment changes and projections.

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