Effective and productive marketing communications operations are essential to a school's long-term ability to sustain excellence in student programs and deliver its mission with distinction. An accountable and results-oriented office must evaluate how well its operations reflect best practices and whether objectives are being achieved. A standard metric makes this evaluation possible.

The following questionnaire provides a framework for appraising your performance and reviewing the practices that define success. Marketing communications professionals can use these metrics to analyze the state of their operations and establish a baseline from which to measure the effectiveness of future strategies. The questions themselves suggest ways to implement best practices—and suggest a framework for measuring progress.

ISM defines marketing communications as how schools: (a) develop their messages, and (b) carry out integrated strategies in service of the whole school that promote shared values, nurture relationships, and strengthen constituents' commitment to and investment in the school. This requires an outward focus—communicating to prospective families and the community at large—but also an inward focus on communications within the school, described as internal marketing. Internal marketing refers to the strategies schools take to bond students, faculty, staff, parents, and alumni to the school. This assessment is intended to help you reflect on the range of marketing communications elements, both internal and external, that contribute to your school's ability to successfully recruit new families, re-recruit current families, and support a culture of philanthropy.

This survey contains 23 questions divided into four categories with the following point assignments:
1. Purpose and Outcome Statements (26 points)
2. Brand Identity and Marketing (24 points)
3. Communications (24 points)
4. Office Operations and Planning (26 points)

Your total for all questions results in a score out of 100 that you can treat as an overall index of your marketing communications operations. All surveys of this kind must be considered in light of your own school's circumstances, and can be refined and tailored to your own operations. The following scale can be used as a general guideline for self-scoring. A score of 90-100 is an indication of an excellent marketing communications program and a solid indicator of school stability. Scores of 75-89 show a good performance. A result in the 60-74 range suggests that while in some areas of marketing communications you are doing well, there are other areas of your operations in need of improvement. A score of 40-59 indicates that your marketing communications operations are still being developed and demonstrate significant weaknesses that need to be addressed. Below 40 should be graded as poor, suggesting a marketing communications program that has much to improve in order to make a significant contribution to the school.

Each of the four sections of the survey can also be evaluated separately as an indicator of where you stand in those areas. In each section there is a maximum number of points of 24 or 26.
### Brand Identity and Marketing

6. Does your school have a clearly and cohesively defined brand identity that is consistently represented in all platforms (e.g., website, print, advertisements, internal communications, community outreach)?
   - Yes (6)
   - Somewhat (3)
   - No (0)
   - Don’t know (0)

7. Are the print marketing materials created by your office attractive, compelling, and of high quality?
   - Yes (6)
   - Somewhat (3)
   - No (0)
   - Don’t know (0)

**Nos. 6–7 Subtotal Score (0–12) _____**

8. Is your school’s website:
   a. Attractive?
      - Yes (1)
      - No (0)
      - Don’t know (0)
   b. Full of high impact photos and video of the student experience?
      - Yes (1)
      - Sometimes (.5)
      - No (0)
      - Don’t know (0)
   c. Updated regularly?
      - Yes (1)
      - No (0)
      - Don’t know (0)
   d. User-friendly and intuitive?
      - Yes (1)
      - No (0)
      - Don’t know (0)
   e. Effective at engaging constituents?
      - Yes (1)
      - Sometimes (.5)
      - No (0)
      - Don’t know (0)
   f. Effective at communicating information?
      - Yes (1)
      - No (0)
      - Don’t know (0)

**No. 8 Subtotal Score (0–6) _____**

9. Does your school’s social media presence:
   a. Feature regular posts in each platform?
      - Yes (1)
      - No (0)
      - Don’t know (0)
   b. Stimulate positive word-of-mouth?
      - Yes (1)
      - Sometimes (.5)
      - No (0)
      - Don’t know (0)
   c. Generate leads?
      - Yes (1)
      - Sometimes (.5)
      - No (0)
      - Don’t know (0)
   d. Invite conversation and feedback?
      - Yes (1)
      - Sometimes (.5)
      - No (0)
      - Don’t know (0)
   e. Invite constituents to events/activities?
      - Yes (1)
      - Sometimes (.5)
      - No (0)
      - Don’t know (0)
   f. Protect students’ identity/privacy?
      - Yes (1)
      - No (0)
      - Don’t know (0)

**No. 9 Subtotal Score (0–6) _____**

### Communications

10. Does your office adapt your messages/communications to meet the information needs of different audiences?
   - Yes (8)
   - Somewhat (4)
   - No (0)
   - Don’t know (0)

11. How effective is your office at coaching relevant faculty, staff, and academic administrators in effective communication strategies?
   - Extremely effective (8)
   - Effective (6)
   - Somewhat effective (4)
   - Ineffective (2)
   - Not at all (0)
   - Don’t know (0)

**Nos. 10–11 Subtotal Score (0–16) _____**

12. Do your office’s communications to your constituents:
   a. Provide advance notice of key calendar dates?
      - Yes (2)
      - Sometimes (1)
      - No (0)
      - Don’t know (0)
   b. Occur on a predictable, timely schedule?
      - Yes (2)
      - Sometimes (1)
      - No (0)
      - Don’t know (0)
   c. Minimize over-communication and redundancies?
      - Yes (2)
      - Sometimes (1)
      - No (0)
      - Don’t know (0)
   d. Ensure that faculty/staff are well-informed about strategic decisions?
      - Yes (2)
      - Sometimes (1)
      - No (0)
      - Don’t know (0)

**No. 12 Subtotal Score (0–8) _____**

### Office Operations and Planning

13. Do you have a marketing communications mission statement?
   - Yes (2)
   - No (0)
   - Don’t know (0)

14. Do you have a marketing communications plan that your office uses as the basis for decision-making?
   - Yes (2)
   - No (0)
   - Don’t know (0)

**Nos. 13–14 Subtotal Score (0–4) _____**

*If you answered “no” on question 14, give yourself a score of “0” on question 15 subtotal score and proceed to the next question.*

15. Does your marketing communications plan:
   a. Identify goals, strategies, time frames, responsibilities, and costs?
      - Yes (.5)
      - Sometimes (.25)
      - No (0)
      - Don’t know (0)
   b. Cover all school communication efforts?
      - Yes (.5)
      - Sometimes (.25)
      - No (0)
      - Don’t know (0)
   c. Support curricular and co-curricular programs?
      - Yes (.5)
      - Sometimes (.25)
      - No (0)
      - Don’t know (0)
   d. Support admission operations?
      - Yes (.5)
      - Sometimes (.25)
      - No (0)
      - Don’t know (0)
   e. Support development operations?
      - Yes (.5)
      - Sometimes (.25)
      - No (0)
      - Don’t know (0)

**BRAND IDENTITY AND MARKETING SCORE (0–24) _____**
23. Does your office follow policies and procedures that are legally compliant and that adhere to industry-wide professional standards regarding, for example, student privacy, use of school logo, copyright, etc.?

   - Yes (2)
   - No (0)
   - Don’t know (0)

   Nos. 21–23 Subtotal Score (0–5) ______

### OFFICE OPERATIONS SCORE (0–26) ______

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<thead>
<tr>
<th>Total Marketing Communications Assessment Score</th>
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<tbody>
<tr>
<td>Purpose and Outcomes</td>
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<tr>
<td>____/26</td>
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<td>Brand Identity and Marketing</td>
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<td>Communications</td>
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<th>Scoring Results</th>
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<tr>
<td>90–100</td>
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<td>40–59</td>
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<td>39 or less</td>
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### Conclusions and Next Steps

A strong marketing communications program makes essential contributions to the success of an independent school. It enhances the school program and creates conditions for delivering a superior education and a richer student experience. Your scores on this assessment help identify your present strengths and weaknesses, and inform strategies for improving your operations. ISM recommends a structured approach to acting on these results.

First, review your overall score. This will give you a sense of how much needs to be accomplished, which gives you a basis for projecting a time line and assessing what people and resources will be required to achieve your objectives.

Second, look at all the cases where you responded “don’t know.” The quickest remedial action you can take on these points is to find the answers to these questions.

Third, identify specific areas where your operations are least optimal. The areas where your scores are lowest are where your efforts should first be focused. If there are a number of such areas, it is essential to prioritize. Select two or three items that you will seek to address in the near term, and concentrate your action planning on improving those aspects of your operations.

Finally, communicate and coordinate with your School Head and the other advancement officers (in admission and development) about your survey results and your plans for moving forward. These metrics provide an objective basis for discussing the responsibilities, needs, and successes of the marketing communications operation.
Discussion

All advancement staff—in admissions, marketing communication, and development—face enormous scrutiny over return on investment, organizational performance, strategic governance, and their contribution to securing and sustaining your school’s future success.

Your responses on this survey will highlight for you those areas in which you are achieving excellence, and areas that you can target for improvement. The survey items give an indication of best practices in each area that you can use as a guide for reinforcing and improving the services you offer to your school and all your constituents. ISM recommends that you use these results to develop an action plan for deepening and strengthening the capacity and performance of your Advancement Team.

Developing Your Action Plan

In light of your scores in this assessment, you can now proceed to consider your next steps to improve and enhance your advancement operations. This section is a guide to developing a plan of action.

1. Scope of action

Consider first your overall total score. This will give you a sense of where you stand with respect to an ideal program that implements the core values and pursues best practices in all phases of advancement. Your plan should start by estimating the scope of the actions you need to undertake to get closer to that objective.

How big is our task?

How long will it take?

What personnel and resources will we need?

2. Be informed

Your scores in this assessment are greatly affected by “Don’t know” responses. The scoring assumes that directors must be well informed about their existing operations in order to optimize them; hence it gives zero points for “Don’t know”. The first step in your action plan should be to review your responses, identify the things you don’t know, and find the answers. Your operation may be better than your scores suggest, but not knowing seriously hinders your ability to take constructive action.

What don’t I know?

How will I find out?

3. Specific needs

Consider your score on each of the items. Your action plan should prioritize the ones with the lowest scores, as these are the areas of greatest need.

Goal #1:

What actions are needed

Personnel and resources required

Timeline for implementation

Goal #2:

What actions are needed

Personnel and resources required

Timeline for implementation

1 The full survey is available through ISM’s Survey Department and Advisory Services
2 We are grateful to Professor Gregory Guy of New York University for his lead work on developing these measures and analyses, and preparing this article