BRANDING IN INDEPENDENT SCHOOLS:
IDENTIFYING IMPORTANT ASPECTS OF THE SCHOOL BRANDING PROCESS

Frank Anthony Patti
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Dedication page

This dissertation is dedicated to my beautiful Havana. Walking out the door every month was not an easy thing, but thinking about someday writing this dedication page always kept me going. Thank you for inspiring me to do this.

Love Always,

Papa
ABSTRACT

BRANDING IN INDEPENDENT SCHOOLS:
IDENTIFYING IMPORTANT ASPECTS OF THE SCHOOL BRANDING PROCESS

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Branding in independent schools is a topic that has not been fully explored by researchers in the field of marketing and branding. Many factors have forced independent schools to begin to look at brand management as a way to respond to sudden enrollment issues. The recession of 2008, increasing quality of public schools, and the rising cost of an independent school education are three major factors that have prompted independent schools to think much more carefully about their images. Although there is some research on the ways that colleges and universities successfully apply branding strategies, K-12 independent schools have very little academic research on which to rely.

The purpose of this research project was to explore the branding process in K-12 independent schools through a case study of one independent school’s professionally led branding initiative. Research on college and university branding tells us that certain parts of the process are more important than others. The qualitative methods employed in this case study revealed that there are three aspects of the branding process that were particularly useful in the branding process of this independent school: understanding the social and political context of a school’s setting, engaging the faculty in the branding process, and developing clear and consistent brand messaging to the internal community. This study concludes by examining the implications of these findings for research and practice.
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CHAPTER 1
INTRODUCTION

Independent schools function as an alternative to public schools. They are made up of day schools and boarding schools, both of which vary in grades taught, enrollment size, academic focus, and mission. Independent schools have the luxury of specializing in specific types of education without being constrained by state and federal requirements and standards.

The term independent school encompasses more than private schools; parochial schools and other religiously affiliated schools also fit under the category of independent schools. Independent schools give families choice in schools beyond local public schools and often offer rigorous academic program and engaged family communities.

One major difference that sets independent schools apart from public schools are the schools’ philosophies. Most independent schools have their own mission statement that guides the school, often informing curriculum and pedagogical approach. Independent schools are governed by a board of trustees, which is responsible for the long-term financial plan and strategic vision for the school. The board is made up of a number of committees, and it oversees the head of school, who is solely responsible for the everyday operation of the school.

Independent and public schools are also financed differently; unlike public schools, which are funded by state and federal money, independent schools are funded by tuition, fundraising, and, in some cases, endowments. Most importantly, apart from safety and building codes, independent schools are not controlled by state laws.

Independent schools vary in size, type, and scope. There are K-5 independent schools with smaller student bodies, and some larger K-12 independent schools have upward of 2,000 students. There are day schools, boarding schools, and some schools that offer both options. Apart from differing in size, independent schools also vary in educational approach. With some schools being traditional and others being progressive, independent schools represent a broad spectrum of pedagogical approaches to teaching and learning.
Independent schools have mission statements that guide their educational experiences. Mission statements vary from school to school and define the type of education the schools provide. Independent schools have admissions processes that help to identify *best fit* families (i.e., families that value and expect the type of education provided by a specific school). A major goal of independent school admissions offices is to fill classes with *best fit* students: those whose families align with the mission and values of the school.

Meeting set enrollment targets is a major priority of independent school admissions offices. Unlike public schools, most independent schools rely on tuition for a majority of their operating budgets. Enrollment is what keeps independent schools going.

There are different tiers of independent schools, both locally and nationally. There are a relatively small number of elite, top-tier schools in the United States with extremely selective admissions processes and therefore show a strong and steady enrollment year after year. Other schools have not been so lucky with enrollment over the past ten years. Since the financial crisis of 2008, the selection process for families has been more difficult. The combination of financial distress and rising tuition has changed the landscape of independent school admissions. Many families have turned to public and charter school instead of local private schools. Families that continue to explore private schools have also begun exploring equally rigorous – and at times cheaper – alternatives. In *Sizing up the Competition*, The Enrollment Management Organization, then known as SSATB (2015), reported:

There is an explosion of school choice across the country and the world – and it’s not just homeschooling and back-to-basics charters any more. New school types – well-financed by private equity – are coming into both the public and private school markets, determined to lure the most discriminating families by competing in the very domains which have long seemed independent school strengths: academic excellence, progressive learning environments, personalized attention, and more (p. 27).

The independent school market has become more competitive and complex. Even top tier schools that generally have had an easy time fillings seats with *best fit* students have begun facing enrollment challenges. Since families now have more options, independent schools must work harder in the admissions process. According to a study by Rhoden (2009), there was a large difference in pre-recession and post-recession admissions yields. According to this work, more
students were admitted to independent schools, but a smaller number decided to enroll. This
dynamic has forced many admissions directors to accept more students to attain the same yield,
which has its own consequences for the admissions process.

Schools look for best-fit students during the admissions process. With a weaker yield of
students, many independent schools have started to accept students and families that do not
align as well with the school’s mission and program. This particularly affects schools that are not
in the top tier; these schools are often the first to see the impact in under-enrollment. In turn,
under-enrollment has a strong effect on these schools, since their operating budgets are tuition-
dependent.

The competitive nature of the independent school market has had an impact on
admissions yields in all types of independent schools. This change in yield caused many
independent schools to lower their admissions expectations. “A growing acceptance rate, amid
decaying-to-flat application activity, reflects softening selectivity in admissions” (Rhoden, 2009, p.
9). This means that schools have started to lower their traditional admissions criteria when
accepting students and building a class.

The growing number of school options for families has also added to the competitive
marketplace. The increase in charter schools alone has created more opportunities for families
who would ordinarily look to independent schools for their children. “According to the U.S.
Department of Education, enrollment in U.S. charter schools grew 260 percent between 2001 and
2011, and the number of charter schools grew 143 percent” (NAIS, p. 4).

In 2009, the National Association of Independent Schools (NAIS) reported that a majority
of independent school applicants had begun to consider other types of schools. The study found
that 80% of families began considering more educational options, such as home schooling, public
schools, and charter schools. This has ultimately created a broader choice environment for
independent schools, meaning that families now have more options from which to choose than
they once did. Applicants are now able to look at independent schools with a more critical eye.
With the improving quality of traditional public schools and the increasing number of charter
schools in many communities, some families are beginning to think about the added value of an
independent school education (NAIS, 2009). This has led many independent school families to inspect many factors when considering a school – including the teaching, curriculum, facilities, extra-curricular activities, and college matriculation – in an unprecedented way. While it was once an easy decision for families to choose a reputable independent school, families now put more thought into the school selections process. This in turn has forced many independent schools to pay closer attention to admissions and enrollment.

Problem Statement

NAIS has responded to these challenges by publishing resources that provide schools with tools and best practices for enrollment management. Independent schools rely heavily on these resources. Unfortunately, there is little existing academic research on how formal branding processes may help schools manage their enrollment.

The core problem is the increasingly competitive landscape of independent schools and their enrollment challenges. To bolster enrollment in a competitive school choice environment, many schools look to branding as a solution or as a means to increase enrollment.

Product branding theory has evolved and its techniques are now established, [but] the application to services is a little more uncertain and the more specialized areas of marketing, such as education, are even less developed (Chapleo, 2010, p. 170).

An examination of the branding process is particularly important for independent schools like my own – a school in New York City where meeting enrollment targets has become an issue. With families moving out of New York because of the increasing cost of living, admissions directors in this setting are going above and beyond to break into different markets. For these schools, brand perception and reputation are extremely important in attracting applicant families. Finding patterns in successful branding projects at schools would help future branding initiatives.

It’s been five full school years since the onset of the Great Recession in 2008. Virtually all NAIS schools weathered the storm. The emergent admission and financial aid picture has been shaped by recession-driven imperatives and reactions (NAIS, 2014, p. 14).

It is important to look at how branding work is helping independent schools bounce back from these challenges.
Schools have been informally branding for a long time. Looking at long-standing independent schools and universities, we can see that schools have taken on their own brands and reputations over years of existence. Today, privatized branding companies have emerged. The high demand for school branding work has created a market for experts to help to guide independent schools through the daunting branding process. With many independent schools now engaging in branding work, it would be helpful to look closely at one school that has been through this process. By examining how frameworks for corporate branding have been adapted to the independent school context, we can see what lessons might be derived to help other schools who engage in the formal branding process in the future. Currently, there is very little research on this topic.

**Purpose Statement**

The purpose of this study is to investigate the branding process in K-12 independent schools through a case study of a professionally-led (i.e., led by a marketing and branding firm) branding initiative for an independent school. The study brings to light aspects of the process that were specific to the school context. My hope is to add to the literature on branding by offering possible areas of focus for branding in the independent school setting.

**Research Questions**

My study has been built on two research questions as I have sought to understand a particular professional K-12 independent school branding effort.

1. How do representatives from both a K-12 independent school and a professional branding firm describe how the branding process was applied in their joint effort?
2. How do representatives from a professional branding firm vendor describe the particular challenges and change that they made to their process to adapt it to work for a particular K-12 independent school client.

By speaking with members of the school community and with consultants from the branding company, I was able to investigate a specific case to identify which parts of the process were more or less effective in this school setting.

Significance and Rationale

The introduction in the NAIS Trendbook (2014) contains a letter from the late John Chubb, former President of NAIS, which frames conversation about enrollment changes in independent schools and looks optimistically to a brighter future:

The challenges of the Great Recession jolted many schools out of a period of complacency, forcing them to reevaluate the type of education they offered and the financial models that had sustained them for decades. While no single model has emerged supreme, independent schools everywhere are experimenting with different approaches. This focus on the future has already spurred many great innovations, and more are likely to come.

Chubb’s message assures independent schools that though this change in landscape is a challenge for many, it is promoting creative thinking on the part of independent schools across the country.

Positionality

There are several dynamics related to my identity and experience that forced me to think carefully about my positionality in this study. First, I recently helped to lead a branding initiative at work, sitting on my school’s steering committee for the project.
was a major player in the work and had decision-making power as well as a front row seat to the branding work. I was mindful throughout this research process to always be aware of my own biases during data collection and analysis, as I had already been through my own branding initiative.

Additionally, my own school’s branding initiative was led by the branding company that I selected for this study. It was important for me to separate my own experiences with this company from my research for this case study. To help me monitor this, I often included reflections on my positionality in my research memos.

**Organization of the Dissertation**

I began this first chapter with an introduction to my topic and setup the context of my study. I provided a short summary of my literature review, and a summary of my methodology. My research questions were defined, and I also provided a short statement on my positionality and my relationship to this work. I am aware that the nature of my work could possibly interfere with my collection and analysis of data. In my secondary position as Dean of Faculty, my job is to develop strong relationships with faculty in order to maintain a positive school culture. It was important that I pay careful attention to the possibility of my own work developing faculty culture might affect the way that I viewed the branding process.

In Chapter Two, I give an overview of the existing research about my conceptual framework. My literature review includes three bodies of research. The first is research done by NAIS about enrollment challenges that are faced by independent schools. The second is an overview of the most recent literature on branding and marketing. In this
section, I create my own definition of *branding* that I used as a foundation for this study. The last body of literature that I present in my review examines branding in higher education. This section discusses the works of researchers, primarily Chris Chapleo, who address findings of branding studies from the university setting.

Chapter Three describes the methodology I used in my study. Since this work is one of the first studies of the topic, I decided to use a case study approach. I selected a school that had recently been through a branding process. I interviewed members of the school community along with members of the branding company that led the work.

Chapter Four is a context chapter that sets the stage for the case study. Here, I go into detail about the city of Memphis and the dynamics that continue to affect its education system. I also describe the site that was selected, The Hillview School (a pseudonym), and give a brief overview of its history. I end the chapter with a description of the Accel Group, the branding company that was hired to design and implement the branding work at The Hillview School.

In Chapter Five, I discuss the findings of the study, laying out three themes that emerged from the data. I illustrate these themes with quotes from my interviews, notes from my research journal, and notes from my site observations.

Chapter Six, the final chapter, discusses the meaning of the findings of this case study. I take the findings and frame them in a way that could assist schools or branding consultants in the future design of independent school branding initiatives. I also provide next steps for future researchers on this topic.
Conceptual Framework

Figure 1 illustrates the conceptual framework I used for this study. Research on enrollment challenges at independent schools has found they increasingly require branding. Though there is little research on independent school branding, I looked to research on corporate branding and research on branding in higher education to inform the way that I think about branding in independent schools.

Figure 1. Conceptual Framework
CHAPTER 2
LITERATURE REVIEW

Enrollment Changes in Independent Schools

The past decade has been challenging for many independent schools. Nearly half of the 939 schools in an analysis of enrollment changes between 2006 and 2014 lost students over the last decade (Chubb & Clark, p. 1, 2015).

These enrollment challenges referred to by Chubb and Clark (2015) vary depending on school type, location, and reputation. There are several distinct patterns that have emerged at independent schools across the country. Research conducted mostly at National Association of Independent Schools (NAIS) identifies several possible causes for enrollment changes in US independent schools.

The recession of 2008 left many families with difficult decisions to make. Independent schooling became a luxury as the economy crashed. Beginning in 2007 and going through 2008, just over 10 million people were unemployed (Borbely, 2009). Changes in household finances made families reconsider what was once a given in their communities: the value of independent education.

Shortly after the recession, NAIS (2009) conducted research to see if families’ perceptions of independent schools had changed. In this study, researchers spoke with education consultants, current parents, and prospective parents. Not surprisingly, findings revealed that families were worried about the financial burden of an independent school education. According to the study, “80% of families are feeling a greater concern about their ability to finance a private school education than before the recession” (p.3). There is no doubt that the financial crash and its aftermath changed the way that parents approached the independent school admissions process.

Enrollment management is a relatively new concept in independent schools, and it is a direct answer to growing enrollment issues. “Enrollment management is an institutional response
to the challenges and opportunities that recruiting and retaining the right student body present to a school’s financial health, image, and student quality” (NAIS, p. 5, 2008). As schools continued to experience admissions problems, school leaders made it a priority to address how they recruited students.

As students started to move from independent schools to public schools, a focus on student retention emerged. A new priority for admissions directors, beyond finding best fit students, was retaining them. “Recruiting, enrolling, and retaining students are the essential challenges for independent schools. And in a tight financial market, schools must work even harder to attract and keep the best students” (Gow, 2009, p. 411).

Every year, families are given more and more options for schooling. An array of reasonable school options, along with the hardships of the recession, created a perfect storm for independent school admissions. When parents started to look around at charter schools and public schools, they found these other possibilities to be very promising.

Changes in the landscape of the K-12 public school system have played a major role in these enrollment challenges. Conversations about the Common Core State Standards have drawn attention to public school curriculum and have prompted an incredible amount of transparency with the community, including granting access to curricular and assessment data.

Federal and state governments are increasingly calling for greater accountability in K-12 education and for nonprofit transparency. Both of these trends suggest that independent schools must continue to proactively communicate their ‘value-added’ benefit to all key constituents (NAIS, 2014, p. 1).

In 2009, NAIS reported that a majority of independent school applicants had begun to consider other types of schools. The study found that 80% of families began considering more educational options, like home schooling, public schools, and charter schools. The prevalence of charter schools alone was enough to contribute to the increased alternatives. “According to the U.S. Department of Education, enrollment in U.S. charter schools grew 260 percent between 2001 and 2011, and the number of charter schools grew 143 percent” (p. 4).

There was also a marked shift in parent perception of independent school programs. In the same 2009 study by NAIS, respondents showed decreased confidence in work of
independent schools in several areas, including discipline, parent participation, class size, and nurturing environment.

**Branding: A Sign of Distinction**

The issues outlined above have all contributed to the enrollment challenges that independent schools face. Research, primarily spearheaded by NAIS, has pointed to communication and messaging as a ways to remedy these problems. "As a community, independent schools need to re-energize efforts to use consistent messages that define and describe the value-added of independent schools" (Bastos, 2012, p. 248). To address this need, branding has become a common practice at independent schools.

**The History of Branding**

The brand on an animal or a person promptly becomes a symbol of ownership and reputation. Branding is usually done by using some kind of mark placed either directly on the object or indirectly on a label (e.g. a slip, a flap, a patch) that is affixed to the object. In addition to signifying ownership and the status of the one branded, a mark might be a positive sign of distinction (Bastos, 2012, p. 248).

Literally, *branding* means *burning*. "Root definitions of the words brand and branding include such elements as a flaming torch and a hot iron" (Bastos, 2012, p. 351). Egyptians and Greeks used branding to mark animals and slaves to show ownership. This word was eventually adopted by the business world as a symbolic representation of ownership.

In the 1800s, items were sold mostly in bulk, so there was little reason for differentiation of products. When stores started to sell goods for single consumption, labels and names were incorporated as a way to set certain products apart from others. Identity was eventually introduced to the marketplace and products started being labeled and promoted (Bastos, 2012, p. 354). Brand names were born. They were used as a way to add value to products, with the goal of increasing sales.

Brand names became popular in the mid-1900s when the business world began to make greater use of psychology. The field of marketing emerged, and suppliers began focusing on the psychology of the customer experience. "Marketing research started to show signs of growth as
managers of competing brands sought to understand the increasing segmentation of the mass market” (Bastos, 2012, p. 354).

Store owners realized that customers drove the sales process. “That phenomenon led to intensive competition and proliferation of brands. In this scenario, minor brands and new brands came forth to challenge the top names” (Bastos, 2012, p. 356). With this, branding became a popular practice of developing value and personality for products and services.

**Present Definitions**

The lack of research on branding in K-12 independent schools forced me to define branding by looking at literature from the business world. It is reasonable to apply the business literature to the school setting given that schools ultimately function as institutions which, if not profit-motivated, at least must not show a loss. It is entirely possible to read business studies and to interpret employees as teachers and to understand stakeholders as parents and students.

The American Marketing Association defines a brand as “a name, term, sign, symbol, or design, or combination of them, to identify product(s) of one company and to differentiate them from those of competitors” (2016, p. 1).

Branding and marketing experts have gone much further in defining branding, as the term has changed over recent decades. By the 1990s, branding was discussed and explored in the business world. Literature on the branding process is tangled up with similar topics, such as brand management and marketing. Though these topics are very similar, several researchers have examined branding as its own topic, and they have developed a corpus of literature surrounding the topic. Despite emerging research about the branding process, there remains no singular definition of the word or process. Several researchers in the field have offered their own useful definitions of branding.

Bick, et al. (2008) speaks of branding with a focus on unique characteristics and differentiation from other products. His work examines the importance of contrasting the product with competitor brands and says that branding is “a manifestation of the features that distinguish an organization from its competitors” (p. 842).
Einwiller and Will (2002) focus more on the process of communicating product or organization differentiators. They define branding as

...a systematically planned and implemented process of creating and maintaining a favourable image and consequently a favourable reputation for the company as a whole by sending signals to all stakeholders and by managing behaviour, communicating, and symbolism (p.101).

This school of thought focuses on image and reputation in branding, and the importance of consistently communicating with all members of the community. Einwiller (2002) puts particular emphasis on the messages being sent out to the external community as a way to manage reputation.

Harris and De Chernatony (2001) typify another prominent school of thought. This perspective defines branding similarly to Einwiller and Will (2002), but emphasizes the internal members of the organization as the definers of the brand. Branding in an organization means that the behavior of the people within the organization should understand and illustrate the brand image. They define branding as “a holistic approach to brand management, in which all members of the organization behave in accordance with the desired brand identity” (p. 442). This work prioritizes the people within the institution.

I have combined these three definitions to define branding for this study. I will define branding as the planned and implemented process of creating a positive image that distinguishes an organization from its competitors by using careful communication to all stakeholders and by promoting behavior within the organization that aligns with and supports the brand image.

**Branding Work in Education**

The competitive landscape of the university system, much like the dynamics in K-12 independent schools, has prompted schools to use branding to differentiate from one another. Much like at independent schools, the increasing number of universities has created a crowded and competitive market. “Despite the vast number of potential students, universities are locked in a fierce competition to fill their seats” (Curtis, Abratt & Minor, 2009, p. 404). Luckily, a great deal of research has been done on branding in colleges and universities.
Since there is a paucity of research on branding at K-12 independent schools, it is useful to consider higher education branding research to form my thinking about independent school branding. It is also helpful to look at marketing in various school settings. Several central researchers who have spent time exploring these topics.

**Chapleo’s Work**

Chris Chapleo is a professor and researcher at Bournemouth University. He focuses on branding in the nonprofit sector and higher education. In 2010, Chapleo began publishing his research on branding work in U.K. universities. He spent time looking at branding in higher education and realized that a definition for successful university branding was needed in order to identify patterns in university branding. Chapleo states that successful branding is “clear and consistent in demonstrating distinct competitive advantage and congruous with needs of various customer stakeholder groups” (Chapleo, 2010, p. 172). Given this definition, Chapleo began to look for commonalities in successful branding initiatives in universities.

Chapleo used qualitative approaches to conduct his research, including interviews and site document review. Using his definition of successful university branding, Chapleo selected 11 schools that he identified as having successful brands and then interviewed marketing executives, external marketing managers, and heads of these colleges. He analyzed those data and identified commonalities.

**Difficulty with differentiation**

An important step in the corporate branding process is differentiating the brand from competition brands (Chapleo, 2008). This seems straightforward when working with products, but it is more difficult to do in a school setting (Chapleo, 2008). Research on university branding demonstrates the difficulty in finding genuine differentiation. For example, claiming that a school has a rigorous program does not actually differentiate it from other schools. “These differentiators are actually very similar in other institutions” (p. 127). This suggests that the important step of differentiating a brand is different in the school setting.
**Internal Branding**

Internal branding plays a big role in almost every corporate branding process. “The objective of internal branding is to ensure that employees transform espoused brand messages into brand reality for customers and other stakeholders” (Punjasri & Wilson, 2007, p. 58). This plays an important role in branding work in higher education. Chapleo describes the importance of the internal community managing the brand and says, “Internal acceptance appears to be critical for a real and sustainable brand, and consideration should be given to how to win acceptance to staff at all levels” (2008, p. 30). Though this is certainly important with all types of branding, it seems to have a powerful impact in higher education. To that end, having a faculty and staff who understand and live the brand on a daily basis is equally important as communicating to the external community.

**Clear and Engaged Leadership**

Studies (Chapleo, 2008; Curtis, Abratt & Minor, 2009) of the corporate branding process have revealed that much of successful branding work involves the work of a dedicated leader who was fully immersed in the branding process. This means that the leader took full responsibility for the branding effort and worked to communicate the spirit of the brand to all constituents. Strong leadership behind the branding work is one of the most important aspects of branding (Curtis, Abratt & Minor, 2009).

More specifically, it is important for the leader to understand the brand and to accept the need for brand management (Chapleo, 2008). Rather than having the branding work be led by other members of the organization, the head of a university undergoing a successful branding initiative should be at the helm of all messaging and communication surrounding the brand. “It does seem interesting that those institutions seen as having successful brands also seen to have support for branding from the very top and this clearly has a role to play” (Chapleo, 2006, p. 176).

Lastly, Chapleo points to the importance of clear messaging from the leader. “Clear vision is a factor that supports successful branding work” (2006, p. 180). It seems that in the
school setting, clear messaging coming directly from the most senior administrator is the best
way to build momentum and shared goals for the schools.

**Internal communications**

Other researchers have conducted research based on Chapleo’s observations. The work
of Judson and Jevson (2006) builds on Chapleo’s work by focusing on internal communication.
Since colleges offer an experience and not a product, creating energy and brand clarity within the
internal community becomes a top priority.

Developing a brand from the inside out is particularly important for organizations within
the services sector that typically face the challenge of developing the brand for an

Judson and Jevson note that the complex dynamics of schools make it important to develop a
strong understanding of brand from the inside out. These internal messages are “just as
important as those sent to customers” (Judson & Jevson, 2006, p. 100). Additionally, leaders
within an organization should help employees understand the brand, have a passion for the
brand, and give employees language to use when describing it.

**Considering resistance**

Faculty often resist changes brought on by the branding process. Additionally, faculty
may show resistance to the branding process itself, as this is often a new concept for
teachers. Since the notion of branding is fairly new to colleges and universities, this is a practice
that is just beginning to be explored (Chapleo, 2010). Aside from the possibility of teachers
pushing back because the idea of branding is foreign to them, resistance is a common
phenomenon in schools as in many other aspects of life. Research on faculty involvement
describes the importance of including faculty in all school change initiatives.

Many improvement schemes, rooted in the rational-structural paradigm of change,
concentrate on the diagnosis of current illnesses and the prescription of ideal cures,
cures that emphasize positions, policies, and procedures rather than people. They pay
little attention to the lived realities of the educators who must accomplish change or to the
practical problems of institutional innovation. This blind spot is more than just unfortunate;
it is often fatal. Overlooking and underestimating the human and organizational
components of change has routinely sabotaged programs to improve our schools (Evans,
1996, p. 91).
One could argue that school change – in this case branding and marketing – is not the primary source of resistance. But Evans argues that virtually any attempt to promote change in a school can fail if the people on the ground are not a part of the process. Evans points to the importance of acknowledging the human side of schools and incorporating the faculty and staff into important decisions about change. In this case, improving the brand and marketing efforts of a school should involve those on the ground.

**The Corporate Branding Process**

A considerable amount of literature on branding work describes the steps and phases of the branding process. Among the large number of frameworks offered, Daly and Moloney (2004) have the clearest and most cited. In their study, they draw from a case study by Muzellec et al. (2004) that follows a company through the branding process. In the original case study, Muzellec et al. studied the rebranding of the mobile phone company Eircell. Daly and Moloney combined data from the case study with existing research on the components of the branding process. Their framework is based on four marketing domains that are connected and integrated.

The Analysis phase is the first step of the branding process and almost always begins with conducting market research. According to Daly and Moloney (2004), looking carefully at market research is an important starting place. “All aspects of marketing planning should be anchored in, and should be be developed from, a situation of market analysis” (p. 34). To do this, corporations look closely at market potential, size, attitudes and preference, as well as the position of the current brand in the greater context. This involves applying basic market research practices at the beginning of the process.

The business encyclopedia at *Entrepreneur Magazine* recently defined market research.

The process of gathering, analyzing and interpreting information about a market, about a product or service to be offered for sale in that market, and about the past, present and potential customers for the product or service; research into the characteristics, spending habits, location and needs of your business’s target market, the industry as a whole, and the particular competitors you face (Entrepreneur Magazine, 2016).
The American Marketing Association also explored the importance of market research in
the college setting. According to Fleming (2010), an important step in that process is examining
the existing market before the work begins.

Market research is empowering colleges and universities to evaluate their competitive
landscapes in a detailed, comprehensive way, and ultimately determine how to prioritize
their marketing spending. This research can help your institution’s marketing department
use their time and money more efficiently, and ultimately bring in more students who are
well-matched with the school’s offerings (p. 1).

Fleming (2010) also points to the importance of differentiation when looking at a school’s
market. She states that market research is an opportunity to “find the characteristics that truly
distinguish your institution in the eyes of students and other audiences, as well as highlight new
opportunities for differentiation” (p. 1). She argues that this enables businesses— and I argue, by
extension, schools— using this approach to gain a competitive advantage over their competitors.

Fleming (2010) goes on to talk about a qualitative process that often involves interviews,
focus groups, and surveys. This also involves secondary sources like previously conducted
research or documents. Fleming stressed the importance of a thorough market research phase
before beginning the work.

Accurate and thorough information is the foundation of all successful business ventures
because it provides a wealth of information about prospective and existing customers, the
competition, and the industry in general (p. 14).

Daley and Moloney (2004) explain that the second part of the analysis process involves
using these same marketing strategies with the inside community in order to understand how the
internal community views the brand. “The same external marketing techniques used for external
research can be used to learn about the management’s and employee’s perceptions, attitudes,
fears, and aspirations” (p. 34). Researchers point to the importance of understanding the opinions
of the internal community. Daly and Moloney signal the importance of understanding the feelings
and opinions of the internal community in order to acquire important data from them and to obtain
buy-in from employees.

After building an understanding of internal and external factors through the Analysis
phase, the Planning phase looks closely at ways to gain support and buy-in from the internal
community (Daly & Moloney, 2004). Data from the Analysis phase is used to construct ways to connect internal parties with the brand. According to Punjaisri and Wilson (2007), internal branding is actually the most important step in creating a powerful brand. “[Internal branding] assists the organization in aligning its internal process and corporate culture with those of the brand” (p. 60). By internalizing the brand identity, employees will illustrate and demonstrate the brand.

The second part of the Planning phase is the creation of the marketing plan. Davids and Newcomb (2006) suggest that creating a strong and thorough marketing plan can make branding work, and lacking such a plan can break the entire branding campaign. They state, “Marketing is simply a way of communicating how you and your company can fulfill the needs of the customer” (p. 22). They recommend that corporations participate in a number of exercises, define the target market, plan a communication strategy, and create a brand positioning statement. “A brand positioning statement...defines who your company is and what it stands for in the marketplace” (p. 24). A carefully designed marketing plan will structure the branding initiative around important key branding ideas.

Reis and Trout (1986) describe the tremendous strategy that goes into making a marketing plan. In Marketing Warfare, they liken the marketing process to the art of warfare.

Strategic planning will become more and more important. Companies will have to learn how to attack and to flank their competition, how to defend their positions, and how and when to wage guerilla warfare (p. 6).

According to Reis and Trout (1986), making a plan based on the qualities of competitors is the number one priority when making a marketing plan. When making these plans, schools should consider exactly where the school sits in the market. According to Reis and Trout, industry leaders should focus on defensive marketing plans, as they are defending their number one spot. On the other hand, the number two and number three in the industry should design a plan that takes an offensive approach. Taking time to develop careful marketing plans is an important step in the branding process.

The final stage of the framework is the Evaluation phase. Daly and Moloney (2004) write about two types of evaluation that should be applied during the branding process. First, they
argue that a formal evaluation of the branding work should happen as a reflection to the work. Such a reflection would include a close analysis of the progress of the branding work and a map of next steps for the work. A final evaluation of the branding initiative also should be done in order to sustain the brand after the original implementation and to offer a roadmap for future work.

Less formal evaluations should also occur on an ongoing basis throughout the branding work. It is easy to miss opportunities for improvement and redirection if there is no ongoing evaluation (Daly & Moloney, 2004). Daly and Moloney emphasize the importance of ongoing reflection throughout the branding process, which includes both repeatedly reflecting on the goals of the work and looking for ways to measure the branding initiative’s success. They explain that this type of reflection is important because the branding work should be iterative and touching back on the goals throughout the process will strengthen it.

### Koler and Fox: Elements of the School Marketing Process

It is useful to look closely at the research of Koler and Fox (1995), who focus on marketing a wide range of educational institutions. As defined above, branding is the planned and implemented process of creating a positive image that distinguishes an organization from its competitors by using careful communication to all stakeholders and by promoting behavior within the organization that aligns with and supports the brand image. In contrast,

Marketing is the analysis, planning, implementation, and control of carefully formulated programs designed to bring about voluntary exchanges of values with target markets to achieve institutional objectives. Marketing involves designing the institution’s offerings to meet the target market’s needs and desires, and using effective pricing, communication, and distribution to inform, motivate, and service these markets (p.6).

Essentially, branding involves the true essence and identity of the school, while marketing involves the way a school delivers messages about the school identity. Though educational marketing and corporate marketing are not the same, looking at corporate marketing can help us examine what branding should look like in educational settings.

Koler and Fox (1995) focus on marketing in a number of learning settings including public schools, universities, and other education-based organizations. In *Strategic Marketing for
Educational Institutions, they provide a marketing sequence that schools can follow to examine and address marketing issues.

1. Research Stage

Koler and Fox (1995) explain that their Research stage includes a thorough study of the school in order to identify and understand underlying marketing issues. This involves a number of research methods to create a full picture of the school’s relationship to its market. They stress that before launching into solutions to a marketing problem, schools must take time to fully understand the underlying issues. "Before undertaking the process, decision makers should take pains to identify the 'right' problem, and take seriously the results of data gathering" (p. 67).

Koler and Fox (1995) describe the marketing audit as a tool to identify marketing problems. This is an inquiry process that focuses on an investigation of the underlying issues at a school. Marketing audits provides data that can inform school leaders’ and consultants’ decisions about marketing.

This work is usually done by collecting and analyzing a school’s pre-existing documents and data. Useful information can be obtained from the offices of development, admissions, alumni relations, and enrollment management (Koler & Fox, 1995). This internal information is useful in helping school leaders focus on underlying marketing issues. Other types of exploratory research can be used to supplement this internal data. Interviews, surveys, and focus groups are often used to collect more information from the internal community.

2. Understanding the Market

Koler and Fox discuss the Market Research stage, where consultants work to understand the greater market that surrounds the school. Collecting information on marketing trends gives important insight into the early stages of the marketing process. “Gathering marketing intelligence supplies information on current happenings and emerging trends” (Koler & Fox, 1995). This gives school leaders and marketing consultants information about the world beyond the institution. It also requires schools to look carefully at market measurements for a number of factors, including
estimates of market demand, market size, future size, and potential market (Koler & Fox, 1995). This information is vital to uncovering a school's marketing issue.

3. Data Analysis

“The final step in the marketing research process is to develop meaningful information and findings to present to the decision maker who requested the study” (Koler & Fox, 1995, p. 87). This means putting all of the information together, both data collected from the school community and research on the surrounding market. Once the major issues have been identified and then supported by market research, the main ideas are presented to decisionmakers to help move the process forward.

4. Strategic Planning

According to Koler and Fox (1995), the next step in the marketing process using the findings that emerged from the Data Analysis stage is to make a plan. “Educational institutions should carry out strategic planning and tactical marketing planning. The resulting strategy includes decisions about the institution’s current and future programs” (p. 116). These strategies should include two different types of strategy: long-term and tactical. The long-term strategy is the aspirational strategy, while the tactical strategy consists of the action steps used to achieve the goals. Koler and Fox considered this the most important stage in school marketing.

They need to direct their marketing budgets and personnel more productively, by “doing the right things” as well as by “doing things right.” This requires having a clear and intelligently planned strategy (p. 163).

The Strategic Planning stage results in a complete marketing plan, including steps in programming, services, pricing, and communication to the internal and external community.

Marketing strategy is the selection of a target market, the choice of a competitive position, and the development of an effective marketing mix to reach and serve the chosen market (p. 163).
5. Evaluating

Constant evaluation is the best way to monitor the progress of a school's branding and marketing work (Koler and Fox, 1995). Going back and revisiting important topics is vital to keep the work going.

Evaluating marketing performance can take place at several levels in the institution. The type of evaluations will depend on the institution’s commitment to marketing and on its stage in the implementation process (p. 465).

Koler and Fox describe a number of tools that can be used by schools to monitor progress: enrollment figures, competition analysis, and satisfaction surveys, among others. By using these tools regularly, schools can evaluate progress on a more consistent basis.

Koler and Fox (1995) was also mention that schools should perform ongoing marketing audits. Just as schools begin marketing work with a marketing audit, they should consistently collect and analyze data to make sure that the marketing work is on track. “A marketing audit is a comprehensive, systematic, independent, and periodic examination of an institution’s marketing environment” (p. 470). Using the audit process on a consistent basis allows institutions to sustain change, rather than treating marketing work like a task that can be completed and forgotten about.

A School Branding and Marketing Framework

By merging the work of Daly and Moloney (2004) with the work of Koler and Fox (1995), I assembled a simple framework that could be used to outline branding work in school setting (table 1). The framework, which consists of six distinct stages of the branding process, will be used to explore the branding process that was studied in this study.
Table 1.

*Branding Framework*

<table>
<thead>
<tr>
<th>Stage #</th>
<th>Stage Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Research</td>
</tr>
<tr>
<td>2</td>
<td>Market Research</td>
</tr>
<tr>
<td>3</td>
<td>Data Analysis</td>
</tr>
<tr>
<td>4</td>
<td>Planning</td>
</tr>
<tr>
<td>5</td>
<td>Applying Program</td>
</tr>
<tr>
<td>6</td>
<td>Evaluating</td>
</tr>
</tbody>
</table>
CHAPTER 3

METHODOLOGY

With the post-recession challenges that many independent schools face in enrollment, the need for research on branding in K-12 independent schools has dramatically increased. This study is designed to look closely at branding efforts at a K-12 independent school to inform future school branding work. My research questions include the following items:

1. How do representatives from both a K-12 independent school client and a professional branding firm vendor describe how the branding process was applied in their joint effort?

2. How do representatives from a professional branding firm describe the particular challenges and changes that they made to their process in order to adapt it to work for a K-12 independent school client?

This study employed a qualitative research approach as a tool for inquiry. Qualitative research design fit well with this study because it enabled me to understand the branding experience of people in a school, who, according to the literature, are the ones who must adopt the brand. Through my use of interviews, I was able to use qualitative methods to look closely at the context of the situation to fully understand the perspective and observations of participants (Ravitch, 2016).

This study used a case study methodology, and I strategically selected a school to study. Rather than looking at a wide range of schools, I used specific, relevant criteria to identify one school to explore deeply. Case studies are valuable when looking closely at one event or activity (Ravitch, 2016). Zooming in on one school, rather than looking at multiple schools, provided me the opportunity to speak about one event by speaking with a number of constituent members.

Using the case study design for this study also framed this work to be an introductory look at this topic. With no research on branding initiatives in the independent school setting in the literature, a case study allowed me to take a general “first look.” By thoroughly investigating the
successful branding initiative at one school, I was able to uncover important details about the
process that have not yet been studied. Generating qualitative data from members of the school
community allowed me to look at one site (Yin, 2014) holistically.

**Sampling, Participant Selection, and Selection Criteria**

I selected a school for this case study as a teaching case. According to Ravitch and Carl,
"a teaching case is an in-depth case study that offers such deep insight into a phenomenon that it
serves as a source of substantial illumination" (2016, p. 128). By creating a high-quality teaching
case study around a successful branding initiative, I gained important insight that can be offered
to schools looking to use a branding framework. Additionally, my case study can be a springboard
for future research on the topic.

**Site Selection**

My goal was to select a school that represents a ‘critical case’ in school branding. I chose
a school that has demonstrated and undergone effective branding work. To achieve this, I relied
on recommendations from experts in the field. Using Chris Chapleo’s definition of successful
university branding, I created my definition for successful K-12 independent school branding.
Chapleo defines successful branding as “clear and consistent in demonstrating distinct
competitive advantage and congruous with needs of various customer stakeholder groups”
(Chapleo, 2010, p. 5), and I combined this with the goal of finding a school that had increased
applications and stabilized enrollment after a branding initiative. I assembled the following list of
six attributes to help identify potential schools.

*Showed a stabilization or increase in enrollment*

When looking for a school, I was interested in finding a site that could demonstrate a
change in applications and/or enrollment after the branding initiative. This meant that I needed
data supporting an increase in applications during subsequent admissions seasons.
Showed stronger retention

Since retention has been an issue for independent schools, I was looking for a school that could demonstrate a higher retention rate after the branding initiative. This could be illustrated by lower attrition numbers for students between divisions. For example, less attrition for entering 5th graders across the middle school years and less attrition for entering 9th graders across the high school years.

Employed a private branding company that was willing to fully participate in research

The branding company was one important factor in selecting a school. In order to collect data from multiple angles, I needed to select a school that had used a professional branding firm whose employees would be willing to be interviewed and who would be willing to supply documentation from the initiative, research from the branding exploration phase, and a full account of the branding work. I also needed a branding company that would allow two-hours interviews of at least four consultants, including the project manager for the school under study.

Had a Head of School who was willing to allow me to speak with all constituencies of the community (except for students)

It was very important for me to select a school whose head of school was comfortable discussing the branding work. To do this, she/he would have to give me permission to speak to members of the school community, including teachers, staff, administrators, previous head of schools, parents, and/or trustees.

Had a Head of School who was willing to share all documents, timelines, and communications related to the branding process

In order to study site documents as part of my data, the Head of School at the selected school had to be willing to release all documents related to the branding initiative. The first step in my data analysis was to look closely at these documents, so the selected school had to be comfortable supplying this information for my study. To offer a full description of the branding work, I needed a clear picture of what marketing materials looked like before and after the
initiative. These materials included the school’s website, admissions materials, view books, retention pieces, and examples of marketing materials before and after the branding initiative.

**Selection Panel**

To guide in the creation a list of potential schools, I put together a panel of specialists with deep knowledge of this work. I emailed each member of the panel a list of attributes and asked her/him to respond with a list of schools that fit the criteria. Members of the panel are shown in Table 2.

Table 2  
*Members of Site Nomination Panel*  

<table>
<thead>
<tr>
<th>Member</th>
<th>Description</th>
<th># of Schools Recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Member #1 is a long-standing member of NAIS and has a national perspective on enrollment issues in independent schools. This member also has a good knowledge of branding work going on at independent schools on a national level</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>Member #2 is a top branding specialist in the United States and has presented at NAIS annual conference. She has done branding work for the past 15 years at hundreds of US independent schools.</td>
<td>5</td>
</tr>
<tr>
<td>3</td>
<td>Member #3 is a branding consultant who started her career as a communications director at a New York City independent school.</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>Member #4 is a top university branding consultant who also works with independent schools. Member #5 is a retired head of school who now owns a search firm. She has a vast knowledge of what independent schools are currently doing with brand work and marketing.</td>
<td>4</td>
</tr>
</tbody>
</table>

This type of case selection is a reputational case selection. Reputational selection happens when an expert in the field guides the researcher to cases that fit the research criteria (Miles, 1994). Using a group of experts to inform the selection process helped me to identify a diverse pool of potential schools.

I began the process by discussing the list of attributes with each member of the panel so that they understood them thoroughly. I then asked each member of the panel to identify 3-5
schools that fit the profile I shared with them. I allowed the brand consultants to list one school they had worked on, and also asked them to list four branding initiatives with which they were not involved. I also asked the branding consultants and the schools to provide details about the branding process and supply a basic background of each school. From these suggestions, I compiled a master list of recommended schools, paying close attention to the reasoning behind the selections.

Three schools appeared on several lists. After researching these schools, I then contacted them to see if they would be willing to fully participate in the research. Two of the schools were willing. I then spoke with the branding consultants who worked with each school; one of the two branding consultants was interested in participating in the research. I then moved forward with Hillview School (a pseudonym), which fit all of my selection criteria, including participation from school and branding company. As this is a case study, I will provide a full description the Hillview School, as well as the background on their branding vendor (i.e., the Accel Group), and their branding process in Chapter 4.

Data Collection

I used a range of research tools to collect data for this case study. My goal was to immerse myself as much as possible into the school setting to collect information from various angles. Interviews and focus groups are two common and effective ways of collecting qualitative data (Kemler, 2015). This qualitative study used interviews, and it will also included a document study.

Participant Selection

I used a purposeful sampling approach to select participants for the interviews at Hillview School. That is, I sought out participants within this context who were close enough to the branding initiative to give me useful data (Ravitch, 2016). I spoke with participants who worked at the school both before and after the initiative, the team of consultants and administrators who planned the initiative, and people from both inside and outside the school community who may
have experienced the different elements of the branding process. At Hillview, I relied on the Director of Communications to help recruit participants who (1) reflected a cross-section of the Hillview community, and (2) were present before, during, and after Accel’s branding initiative. My goal was to include a range of staff whose participation in the initiative varied. My final list of participants included people who were in every meeting during the branding initiative, participants who were on the leadership steering committee, and employees who were at the school but were not directly involved in the work.

I selected two groups of participants. The first group represented the school community. This included teachers, administrators, trustees, and parents. The second group of participants was from the Accel Group, which included the Creative Director, the Project Manager, and other branding consultants who were involved in the Hillview branding initiative. My interviews with these participants averaged at 60 minutes per interview. (See Appendix 1 for a full list of participants by role.)

**Researcher Interviews**

As in many qualitative studies, this study centered around participant interviews. Interviews are an effective way to gain rich data from participants who have a deep understanding of a topic (Ravitch, 2016). I interviewed 19 participants in order to obtain individualized data from members of the Hillview community and from Accel Group consultants.

These interviews were semi-structured and built around a loose framework that guided my questioning. This semi-structured approach allowed me to use a number of specific questions for all participants while also allowing space for the conversation to take its own path (Ravitch, 2016). This was extremely helpful in my interviews, as perspectives varied and participants experienced the branding initiative in quite different ways.

**Researcher Memos**

I used research memos throughout the data collection process. Memos are an effective way of analyzing and processing notes throughout interviews (Ravich, 2016). In this case, I used short memos after each interview to reflect on the themes that emerged. There were several
times when, based on my questions, a participant recommended I speak to another interviewee. For example, in our interview, the previous Head of School suggested that I speak to the Head of Learning Services, as she played a large role in the first phase of the initiative. My memos allowed me to keep track of these themes and recommendations, and in a few cases they led to additional participants and revised interview questions.

**Researcher Journal**

I used a research journal as a vehicle for reflection through the process. I primarily used this while I waded through site documents – both at the beginning and later in my study. For example, after two hours of reading through the school’s summary from The Accel Group, I wrote a journal entry that summarized my observations. I also did this after reading school documents, the school website, and the marketing materials from before and after the branding project. Not only was the journal a helpful way to collect my thoughts, but I was also able to use my writing as data later in the process (Ravitch, 2016). The research journal was extremely helpful in this study as it helped me determine patterns and themes from the many site documents described below.

**Site Documents**

Archival documents can be an effective source for data in qualitative studies (Remler & Van Ryzin, 2015). They were especially helpful in this case study as I was looking at a before and after case. Table 3 lists the site documents that I gathered in data collection.
Table 3

Site Documents

<table>
<thead>
<tr>
<th>Artifact #</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hillview Website</td>
</tr>
<tr>
<td>2</td>
<td>Hillview “R&amp;R Paper” (50 page report by Accel)</td>
</tr>
<tr>
<td>3</td>
<td>Hillview Promise Statement</td>
</tr>
<tr>
<td>4</td>
<td>Hillview “Portrait of a Graduate”</td>
</tr>
<tr>
<td>5</td>
<td>Accel’s branding timeline for Hillview School</td>
</tr>
<tr>
<td>6</td>
<td>Hillview Admissions Viewbook</td>
</tr>
<tr>
<td>7</td>
<td>“The History of Accel”</td>
</tr>
<tr>
<td>8</td>
<td>Accel’s site visit schedule and description</td>
</tr>
<tr>
<td>9</td>
<td>Interview schedule for Accel’s exploratory phase</td>
</tr>
<tr>
<td>10</td>
<td>Weekly emails from Hillview’s head of school</td>
</tr>
<tr>
<td>11</td>
<td>Enrollment figures from 2006-2015 school years</td>
</tr>
<tr>
<td>12</td>
<td>Applicant figures from 2008-20015 school years</td>
</tr>
<tr>
<td>13</td>
<td>Accel’s “Hillview First Principles” document</td>
</tr>
<tr>
<td>14</td>
<td>Hillview’s Admissions Brochures</td>
</tr>
<tr>
<td>15</td>
<td>Hillview’s Admissions Presentation</td>
</tr>
<tr>
<td>16</td>
<td>“Student Outcomes” documents</td>
</tr>
<tr>
<td>17</td>
<td>Summary for Hillview Board of Trustees</td>
</tr>
<tr>
<td>18</td>
<td>Accel’s “Hillview Marketing Strategy and Launch” document</td>
</tr>
<tr>
<td>19</td>
<td>Hillview’s New Website Data: Compilation for Board Meeting</td>
</tr>
</tbody>
</table>

Admissions materials, marketing materials, websites, online admissions applications, and other communications materials helped me to gain a solid understanding of the school and the branding process. To retrieve these documents from the school, I worked closely with Hillview’s Communications Director, who assembled the materials and emailed or mailed them to me. In order to collect a rich data set, I was strategic in the sequencing of data collection. I began with an exhaustive study of site documents before moving forward with participant interviews. Examining the site documents first gave me an opportunity to get a feel for the school before engaging in conversation with participants. This therefore allowed me to focus on deeper conversation with participants rather than merely collecting facts from them.

Data Analysis

Research Memos

As mentioned in the Data Collection section, I made extensive use of research memos throughout the analysis process. I used memos to focus my thinking after looking at various
documents and after speaking with different participants. Although I did not code my memos as I did my interview transcripts, the memos were nonetheless helpful as I looked for patterns as I moved through the analysis process. This helped me to begin reading the data with ideas for possible patterns.

**Research Journaling**

Research journaling was helpful as I moved through the different phases of data collection. For example, I wrote a reflective journal entry after I finished observations on site documents. This helped me to summarize my thoughts on the site documents before I moved on to interviews. I also found it helpful to write journal entries after I completed the interviews with each group of participants. For example, after I interviewed members of the branding company, I reflected in my research journal by summarizing my impressions of this group and any patterns I had noticed.

**Coding**

After data collection, I used coding to analyze my interview transcripts and site document notes. Coding the interview transcripts, site documents, and observations, allowed me to identify patterns and themes (Ravitch, 2016). I used inductive coding with all of the data, which means that the specific codes I used emerged directly from the data set (Ravitch, 2016). I also coded and integrated my observations from archival and site documents into the analysis.

My first iteration of codes was created immediately after I finished data collection. I read through the data and my memos to identify major themes that jumped out at me, finding eight codes for larger topics. After reading through the data again and also referring to my memos and research journal, I added more specific codes, ending up with a list of 14 codes. I eventually created more specific sub-codes that helped me to dig deeper into the data.

**Member Checks**

I used member checks to run my initial ideas by the participants I had interviewed. It was particularly helpful to go back to the staff at the branding company and the school’s
Communications Director and report back what I was hearing in my interviews. This helped me to move forward through my data analysis while clarifying my initial ideas with participants who were close to the branding work.

**Researcher Roles/Issues of Validity**

As a member of a K-12 independent school that had recently gone through a branding process, I was mindful to pay close attention to how my own thoughts and expectations could be affecting my interviews and observations. Through memos and research journals, I reflected upon the possible ways that my own theories on branding could be influencing my perspective on this work.

Through my school's branding process, I began to wonder about the effectiveness of branding for schools. I became curious about the relationship between marketing and branding in schools, and at one point I was a bit skeptical of branding and marketing work. To make sure that I paid attention to this throughout the data analysis phase, I wrote about this bias in my research memos.

I also stayed mindful of the fact that, while interviewing the employees of the branding company, my pre-existing relationship with a number of the staff could potentially affect their answers. I had worked with two of Accel’s staff while I was involved in my own school’s branding effort, and I remained aware that their answers could be analyzed differently because I knew them professionally. Because I was the lens through which this data were collected and analyzed, it was important for me to keep this at the forefront of my thinking. To address this issue, I only interviewed staff at the branding company with whom I had not worked directly. As the Accel Group is a medium-sized consulting firm, it was possible for me to conduct sufficient interviews with participants from Accel that I had not previously known.

**Triangulation**

My goal was to collect data that truly describe the branding process. It was important for me to triangulate my data by balancing three sources of information:
• Observations of site documents;
• Interviews from members of the Hillview community; and
• Interviews with consultants from Accel.

Triangulation helped me to use data from multiple sources to reinforce my findings (Remler & Van Ryzin, 2015). In this case, triangulation was important to validate information coming from all areas of the branding initiative.

Looking at a school branding initiative using qualitative methods helped me to understand the process from the perspective of both the school and the branding consultants. I designed the research to gain a full understanding of the process by collecting information from a wide range of participants involved in the project.
CHAPTER 4
SUMMARY OF THE CASE

In order to fully analyze the parts of the branding initiative that had an impact on the branding work, I have included this context chapter that sets the stage for the case study. Here, I will: (1) provide a brief summary of Accel's history of the Hillview School, (2) explain the reorganization of the Memphis school system as the primary reason that Hillview sought out a branding consultant, (3) describe the Accel Group, the branding company that Hillview selected to lead their branding initiative, and (4) provide a summary of the branding initiative through the lens of my School Branding and Marketing Framework.

History of Hillview

The Hillview School is an independent day school for grades pre-K-12 located in the suburbs of Memphis, Tennessee. It is a coeducational school with over 1,200 students across three campuses. Hillview was founded at an Episcopal church in 1959, and it soon grew into a pre-K-6 elementary school located in Germantown.

In 1994, Hillview's board of trustees created a strategic plan to add grades 7-12. To facilitate this growth, Hillview built a new campus in Collierville, another suburb of Memphis. As construction and fundraising started for this expansion, the school was approached by a group of anonymous donors with an interest in funding an additional elementary school campus in the center of Memphis. With an initial gift of $6 million and the help of the Episcopal Church, the Memphis campus opened in 2001. This campus was designed to serve students in the city area who would not otherwise be able to afford independent school education, and it has therefore been run almost exclusively on financial aid. As a result of these expansion projects, Hillview's student body has grown from just over 400 students in the 2000-2001 school year to over 1200 students in the 2016-2017 school year.
Table 4

Hillview’s Three Campuses

<table>
<thead>
<tr>
<th>Campus name</th>
<th>Location</th>
<th>Grade Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Original Campus</td>
<td>Germantown</td>
<td>PK-6</td>
</tr>
<tr>
<td>Second Campus</td>
<td>Collierville</td>
<td>7-12</td>
</tr>
<tr>
<td>Third Campus</td>
<td>Memphis</td>
<td>PK-6</td>
</tr>
</tbody>
</table>

Hillview is locally known for its work in diversity and inclusivity. With the addition of the Memphis campus, Hillview’s demographic diversity increased dramatically. In a recent accreditation report, Hillview wrote:

“Furthermore, in addition to massive enrollment growth over the past twelve years, we have experienced transformative demographic shifts. In 2000-01, we had four students of color, accounting for 1% of our student body; currently, our student body is over 26% students of color” (Summary of TAIS Accreditation Report, p. 3).

Leadership Structure

Hillview’s Head of School runs the school and oversees a leadership team that consists of the Director of Admissions, the Director of Advancement and four division heads. The Director of Admissions oversees the admissions process for all three of the school’s campuses. She works with the Finance Committee of the Board of Trustees to set enrollment projections, and she also works closely with the Communications Director to target marketing to increase the applicant pool. Most of the Director of Admissions’s work, however, involves overseeing the admissions office and its five full-time associates.

The Director of Advancement oversees all fundraising efforts and communications at Hillview and supervises the Communications Director. These fundraising efforts include Hillview’s Annual Fund and all capital campaigns. The Communications Director—a key part of the branding project at the center of this study—is responsible for all of Hillview’s marketing and communications material. The Communications Director became the school’s point-person for this branding work.

Hillview has four division heads that are responsible for the day-to-day operations of the school, including overseeing student progress, interfacing with parents, and monitoring the academic program. A Lower School Division Head is responsible for Hillview’s two pre-K-6
campuses. The school's middle school and upper school divisions share the Collierville campus, and they have a Middle School Division Head and an Upper School Division Head. Each division head is responsible for the operations of each division at Hillview’s three campuses.

The admissions office gave the Accel team a general idea of the enrollment and retention at Hillview, including the enrollment challenges being faced by the school. According to these data, overall enrollment was decreasing at an average rate of 5% per year for five years beginning in the Fall 2010. This information led Hillview’s previous Head of School to seek out the assistance of the Accel Group. Two months into the branding process, the Head of School resigned. From that point onward, the incoming Head of School was involved in branding conversations whenever possible. The project was run by Hillview’s Director of Communications and the Chair of the Board of Trustees.

**School System Reorganization**

Hillview’s Head of School, along with other heads of schools in the Memphis area, predicted a major shift in enrollment because of the reorganization of Memphis city schools. This shift in landscape, in combination with the falling enrolment numbers, gave Hillview a sense of concern about the school’s future.

In 2010, government officials in Memphis began looking at a plan to merge the two major school districts in Memphis.

"Unlike typical mergers that occurred before 1980, this merger combined the larger MCS district of more than 100,000 students, 85% of whom were African American, with smaller SCS system of 47,000 students, 52% of whom were white. The combine enrollment of 147,000 students and expansion of the unified county district to include Shelby County’s 800 square miles created one of the largest public school districts in the United States" (Rushing, 2017, p.8).

The goal of this merger was to level the playing field and to save money on taxes, but this quickly changed into a different debate. What began as an economic issue - maintaining a tax base – became a civil rights and racial issue as MCS board members considered the consequences. Almost immediately, families from the predominantly white schools began to push back on the notion of a merger, considering this a threat to the quality of their local schools.
White flight from the city to suburbs in the 1970s gained traction in a push for separate municipal schools. Studies show that residents infer a decline in school quality from the prospects of increasing the percentage of disadvantaged and minority students. (Rushing, 2017, p.17).

Once again, white families began looking for other opportunities for their children outside of the Memphis school system. For the first time in decades, the 2010 census showed a decrease in the population in various parts of Shelby County, with a rising population in areas surrounding schools with independent municipalities (Rushing, 2017). Educational options outside of the Memphis school system included the public schools that broke off from the municipality and existing or new independent schools in the area. This seemed like a major setback for the Memphis community in terms of social justice. Eventually, the Shelby school district pushed back enough and had the option of breaking off from the larger school district.

For Memphis independent schools, this meant another outflow of students to suburban schools. Many residents of Memphis felt that, beyond the fear of a weakening of schools, this was a reenactment of the white flight that had happened 40 years before when schools were desegregated (Rushing, 2017). The racial dynamics were written about in papers across the country, including the New York Times. For the New York Times, Dillon points out that this was beyond an issue of poverty. “Toughest of all may be bridging the chasms of race and class. Median family income in Memphis is $32,000 a year, compared with the suburban average of $92,000; 85 percent of students in Memphis are black, compared with 38 percent in Shelby County” (Dillon, 2011). For many, it was impossible to ignore racism’s role in the exodus of white families from Memphis as a result of the merger.

Consultants from Accel and members of the Hillview community also described a change in Memphis public schools. After students in public schools started switching over to independent municipalities, the Memphis schools allegedly began acting as independent schools, focusing on things like fundraising and marketing.

We found that many of the vendors that we would use for fundraising for our Parent’s Association were now being contracted by these public schools. It made us look really similar. (Advancement interview)
Another important local dynamic for Accel was the shift in the public school system. Members of the Hillview community reported that public schools in the area began marketing themselves as though they were private schools by claiming that they provide a similar experience for students. An admissions officer reported, “Schools that have never even had a bumper sticker ever came out with bumper stickers that matched private schools.”

The restructuring of greater Memphis’s school districts also led some in the broader community to rally around the public school system. According to many participants, the decision to reorganize the public schools was a very public and political move, and public schools used this opportunity to create momentum.

Before this point, we got equal time in the Germantown and Carterville newspapers, and also in the bigger greater Memphis newspaper. After the merger, the media stopped highlighting private schools completely, even the local media. None of the private schools get the stories that they used to, and they’re probably just reading their audience and know that people enjoyed reading about the public rallying. (Director of Advancement interview).

Members of the school community noticed that this shift in public schools also expanded the list of possible schools for families. Families were strongly considering independent schools that they had never before noticed.

Memphis is a mid-major city. We are a part of the Mid-South, which includes Memphis, Shelby County, plus a small piece of Arkansas and a small piece of Mississippi. In the mid-south, there are now 74 high schools alone. You’d be surprised how easy it is to get lost in a crowd (College guidance interview).

The merger of Memphis schools expanded the pool of potential schools in Memphis.

Between the Achievement School District, the iZone, the municipalities, the charters, Shelby County Schools and all of the private schools, we have quite an array from a system that even 20 years ago was just city, county, and private. (Pohlman, p. 112 2008).

As predicted, this had an immediate impact on independent school admissions. A veteran administrator looked back to the admissions process before the merger:

Before, from between 2002 and 2006, we had no trouble whatsoever with enrollment. After the splintering back into smaller municipalities, that number of new sixth graders went from 11 to basically 2. Multiply that by $17,000 a year and things start to get interesting especially if this becomes a trend. A three-year trajectory would be game changing if you don't make a stronger foothold. I do believe that the work that Accel did for us, had we not done it, our admissions results this August would have been catastrophic (Advancement interview).
This dynamic was very important to the Accel Group. The changing dynamics of the public school system in the Memphis area was an important local force not to be overlooked in the branding work. Members of Hillview’s leadership team saw this as another reason to promote the school’s narrative more. “We were recognizing that we were probably a little too comfortable, I think, existing as what we saw as a hidden gem. We realized that not enough people knew about us” (Director of Communication). To fix this, The Accel Group made a plan to tell Hillview’s story more aggressively in the Memphis area, especially in areas that contained new and emerging public schools.

Our task, then, would be to reintroduce Hillview to suburban parents who might be considering a second look at public schools—to elucidate the experiential and vigorous nature of a Hillview education, highlighting its thoughtfulness, its depth, and its validity against a landscape of very traditional pedagogy (Accel Group Reflection Paper, p. 22).

As the dynamics of Memphis schools started to shift, Hillview watched its enrollment drop for three consecutive years. School leaders did not take lightly, and they decided to enlist the help of the Accel Group, a school branding consultancy group that was brought on board to help the school rebrand and reposition the school.

The Accel Group

Accel is a branding and marketing company located in Atlanta, Georgia. Founded in 1996, Accel delivers brandwork for colleges and universities, independent schools, and non-profit organizations. Accel says that it supports organizations to think creatively in order to position themselves for marketing success and “revenue-enhancing practices.” Accel’s founder and creative director describes Accel as a company that combines traditional marketing goals with what the group calls “meta-marketing.” As shown in Table 5, The Accel Group staff is made up of the senior management, project leaders and variety of creative professionals, in addition to a Fiance Manager and Senior Researcher. Accel totals 19 staff members.
Members of the staff are matched and combined to create teams for Accel’s individual projects. These teams are managed by one of the two Project Managers, who are supervised by the Managing Director. Accel’s founder remains heavily involved in the work by leading teams through the creative process.

The Accel Group is considered by many to be one of the top school branding company in the country. Over the past three decades, Accel has worked with hundreds of institutions, including over 75 independent schools, 60 colleges and universities, and more than 30 nonprofits and associations. Additionally, the Accel Group has a strong presence in the world of independent schools, presenting regularly at conferences across the country, most notable conferences including NAIS, NCGS, and CASE.

### Accel’s Branding Process

The Accel Group is transparent with their branding process; they outline the process publicly on their website. Table 6 lays out Accel’s four major steps of the process for their work with The Hillview School. This information is found in Accel’s informational materials that were provided to the client.

<table>
<thead>
<tr>
<th>Founder/Creative Director</th>
<th>Senior Writer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managing Director</td>
<td>Writers (4)</td>
</tr>
<tr>
<td>Marketing Solutions Director</td>
<td>Editor</td>
</tr>
<tr>
<td>Finance Manager</td>
<td>Senior Designer</td>
</tr>
<tr>
<td>Program Managers (2)</td>
<td>Designers (3)</td>
</tr>
<tr>
<td>Coordinators (2)</td>
<td>Senior Researcher</td>
</tr>
</tbody>
</table>

Table 5

**The Accel Group Staff**
The Accel Group Branding Process

<table>
<thead>
<tr>
<th>Phase</th>
<th>Major Steps</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1A: Surface and Synthesize</td>
<td>Background Research, Market Research, Site Visit</td>
<td>Learning about the client’s history, philosophy, and mission. Review all old marketing materials, communications materials, funnel analyses, and advancement reports. Looked carefully at competitors (e.g., schools) and the overall context in which client operates. Conducted in-depth qualitative research with all constituent groups through interviews, focus groups, observations, tours, and on-site meetings. Concludes with meeting with client leadership for informal feedback and recommendations.</td>
</tr>
<tr>
<td>1B: Reconcile and Distill</td>
<td>Data Analysis, Findings and Writing, Differentiation, The Promise Statement</td>
<td>Analyzed collected data for patterns, synthesize the range of perspectives, identify organizational challenges, and surface client strengths. Create the R and R Paper, detailing the results of the data analysis. Identify what unique or unusual client attributes, creating a category of one. Write and delivered The Promise Statement, for client’s internal use to define itself and shape its story.</td>
</tr>
<tr>
<td>2: Conceive and Create</td>
<td>Marketing Strategy, Marketing Guide, Graphic Identity, Creative Prototypes, Concept Meeting</td>
<td>Based on the findings, designed a marketing plan with the goal of increasing admissions applications. Guidelines that provide a reliable method for making marketing decisions that keep messaging on target by ensuring alignment and consistency. A collection of visual elements (e.g., logos, icons, color palette, font palette, photographic style) to support new messaging. Creative constructs that demonstrate how to communicate to targeted audience (e.g., targeted direct mailings, social media and digital applications, campaign books, banners and environmental treatments. Presentation all ideas and work to solicit feedback to and hone the conceptual framework of the brand.</td>
</tr>
<tr>
<td>3: Complete and Reveal</td>
<td>Photo Shoot, Editorial interviews, Creative Implementation, Launch Preparation, Brand Guide</td>
<td>On-site photo shoot, directed by Accel, to provide a long-term image library. Capture work descriptions, project examples, and anecdotes to be used in promotional materials. Examples include admissions and development publications suites, print and electronic ads, social media strategy, and website redesign. Create a launch plan to engage targeted audiences and encourage internal stakeholders to embrace (and act as ambassadors for) the new positioning. Written document that outlines messaging standards, provides visual guidelines, and reiterate the principles of the concept.</td>
</tr>
</tbody>
</table>

The Hillview branding initiative began in Fall 2014 and lasted until Spring 2016. What follows is a summary of Accel’s work done within each phase of the branding initiative as well as Accel’s findings throughout the process. By merging the work of Daly and Moloney (2004) with
the work of Koler and Fox (1995), I assembled a simple framework that could be used to outline branding work in a school setting.

Table 7

Framework for branding work in a school setting

<table>
<thead>
<tr>
<th>Stage #</th>
<th>Stage Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Research</td>
</tr>
<tr>
<td>2</td>
<td>Market Research</td>
</tr>
<tr>
<td>3</td>
<td>Data Analysis</td>
</tr>
<tr>
<td>4</td>
<td>Planning</td>
</tr>
<tr>
<td>5</td>
<td>Applying Program</td>
</tr>
<tr>
<td>6</td>
<td>Evaluating</td>
</tr>
</tbody>
</table>

Stage One: Research

Accel calls the first step in its branding process the “Surface and Distill” phase. This stage is aligned with Daley and Maloney’s (2004) first stage of corporate marketing. Daley and Moloney describe this part of the work as most important because all subsequent work is anchored in market analysis. In the corporate branding model, this step includes examining a company’s market potential while gaining a solid understanding of the organization. As explained in the literature review, this often includes data collection inside and outside of the organization.

This phase began with background research. Accel requested a long list of internal documents from Hillview, including school publications, the school website, and historical pieces about the school. These materials were augmented with an analysis of prior branding and marketing materials. This full audit of the school lasted the entire month of September. Hillview staff collaborated with Accel team members to collect documents from the archives, admissions, and advancement departments. From these sources, Accel assembled a history of Hillview. My summary of Accel’s history follows later in this chapter.

After completing its market research and background investigation, Accel sent a team to Hillview to spend four days on campus from September 30 through October 3, 2014. The Accel team focused on collecting information directly from Hillview’s administration, faculty, staff, and other community members. This site visit allowed the Accel group to gain a deep understanding of the school while also speaking with a large number of community members.
All interviews and focus groups lasted roughly 45 minutes. They were recorded and later transcribed. Accel also observed classrooms and attended school events. Some Accel team members sat in the audience of a lower school concert while others went to sporting events. The site visit concluded with a meeting of the team with a small subset of Hillview’s leadership team: the Head of School, the Director of Communications, the Director of College Guidance, the Director of Advancement, the Director of Admissions, and the division heads. At this meeting, Accel team members communicated their initial thoughts from the site visit. Figure 1 contains a schedule of the visit.
| Day 1          | Director of Communications |
|               | Head of School              |
|               | Small Group Interview: Communications Team |
|               | Focus Group: Division Heads |
| Day 2         | Director of Communications |
|               | Focus Group: Parents        |
|               | Campus Tour                 |
|               | Admissions Team             |
|               | Middle School Parents       |
|               | Focus Group: Academic Admin |
|               | Focus Group: Faculty        |
|               | Focus Group: Middle School  |
|               | parents                    |
|               | Focus Group: Alumni         |
| Day 3         | Director of Admissions      |
|               | Campus Tour                 |
|               | Focus Group: Advancement    |
|               | Office                     |
|               | Student performance         |
|               | Focus Group: Middle School  |
|               | faculty                    |
|               | Focus Group: Upper School   |
|               | Faculty                    |
|               | Focus Groups: Juniors       |
|               | and Seniors                |
|               | Focus Group: Parents        |
|               | with 5+ years at school     |
|               | Focus Group: Trustees       |
| Day 4         | Director of Communications |
|               | Focus Group: Parents        |
|               | Campus Tour                 |
|               | Focus Group: Lower School   |
|               | Faculty                    |
|               | Follow up: Head of School,  |
|               | Director of Communications, |
|               | and Chair of Board          |

*Figure 1. Accel site visit schedule*

**Stage 2: Market Research**

The next part of the "Surface and Distill" phase centered around market research. Accel did this by closely examining surrounding schools in the area as well as trends in the overall landscape of independent schools in the community. Accel looked at schools in the Memphis area and compared tuition, school size, enrollment, mission statement, college enrollment, and
admissions materials. Accel also used internal documents to gain information about surrounding schools. For example, Accel referred to Hillview’s Declined Offer Survey to see where prospective students who did not attend Hillview decided to enroll. This survey was given to all students who were accepted to Hillview but who decided to enroll elsewhere. This helped Accel figure out where accepted students were going and why they decided to go there.

Accel’s first major finding from this research was that students were choosing more traditional schools in Memphis. Most of Hillview’s prospective students selected single-sex institutions. Prospective students also decided to go to surrounding public schools in the Memphis area. This prompted Accel to focus on trends in the public school system in Memphis; in fact, this troubling exodus to surrounding public schools had spurred Hillview leaders to engage Accel in the first place.

**Stage 3: Data Analysis**

The Accel group returned to Atlanta after the site visit. The entire Accel team studied the documents and transcriptions collected up to this point, and then spent several weeks discussing several themes that emerged from the data. Once the themes were agreed upon, the group began collecting supporting quotes and observations. These themes would be used to create several documents that were used to guide the remainder of the branding initiative.

**Stage 4: Planning**

Accel assembled two documents for the Hillview leadership team. The first of these, the *Review and Reflections Paper*, served as an extensive summary of Accel’s research on Hillview. Written in narrative form, this document included a description of major themes of the branding project, explained and supported by quotes and excerpts from interviews. This document addressed the strengths of the school and the challenges facing it, as well as the opportunities for future branding work. The major challenge that Accel focused on was finding ways that the school can be repositioned to increase enrollment.

Accel noted from the very start that Hillview is a school with many strengths, the first of which was that it was considered to be a “hidden gem”. The *Review and Reflection Paper*
described a deep sense of happiness on the Hillview campus; throughout interviews, Accel team members heard nothing but high levels of satisfaction from members of the school community. The energy and pride within the Hillview community was palpable and noted as a major strength of the school.

However, the “hidden” part of the phrase was a problem. According to the findings, it was often difficult for prospective families to identify Hillview as a potential school.

Given the warmth with which they are welcomed to [Hillview], it is not surprising that those who visit often stay. As an administrator said, “we’re good once we get them through the door.” Unfortunately, the door to Hillview can be surprisingly difficult for some good-fit families to find. Many parents we spoke to found Hillview only after a great deal of searching. (Review and Reflection Paper, 2014, p.29).

According to Accel, telling Hillview’s story to a wider audience would be an important step in increasing enrollment.

The Review and Reflection Paper described Hillview as a distinctive school in a crowded market of traditional schools. There are several aspects of the Hillview that set it apart from other private schools in the area: its campus model, student-centered teaching practices, and strong character education component. Accel also noted what Hillview called its “transformational diversity.” Hillview’s Memphis campus, serving students unable to afford private education, is a model that is rare in the world of independent schools. Accel speculated on this difference as a potential building block for Hillview’s improved brand.

In the Review and Reflection Paper, Accel team members wrote enthusiastically about the high-quality teaching that they observed on Hillview’s campus. Teaching was described as progressive, effective, and hands-on. “In classroom visits on all three campuses, we found superior teaching skills with stunning regularity. Everywhere, the instruction exceeded our expectation until the extraordinary began to feel commonplace” (Review and Reflection Paper, Accel Team, 2014, p. 11). The team noted the use of progressive teaching practices in a city that valued traditional learning experiences. In a market where traditional teaching is a popular approach, the use of progressive teaching practices was surprising. The high quality of the teaching emerged as a major theme in Accel’s research.
The Review and Reflection Paper also discussed the major challenges that Hillview faced. Although the quality of faculty and modes of instruction were praised across the board, there seemed to be widespread confusion about the academic program. As a fairly young and quickly growing school, Hillview had gone through significant change. As a result, the school’s internal and external communities seemed to have trouble defining its overall approach. Accel called this an academic identity crisis.

When asked about [Hillview’s] academic reputation in the greater Memphis, focus group participants generated a fascinating list of impressions. Some saw Hillview as an idea place for struggling students. Others touted AP offering and unique challenges for gifted children. Some reported Hillview is known through Memphis as rigorous and challenging, while others lamented its reputation for being soft and accommodating (Review and Reflection Paper, 2014, p. 37).

Accel also discovered that Hillview had a reputation for being loose that was due to a misunderstanding of progressive teaching practices. The external perception of Hillview’s academic program as unchallenging was, in Accel’s opinion, the biggest obstacle for the school to overcome. There seemed to be widespread misunderstanding about Hillview’s academic narrative, from both within the community and outside of the community as well.

The Accel group drafted a document called the Promise Statement for use in messaging and marketing. This document was created to help the school’s leadership clarify Hillview’s overall narrative:

On all three campuses, classrooms come alive with active learning as purposeful yet passionate teachers and intentional but innovative pedagogy encourage critical thinking and fine character, vibrant creativity and pure joy. Hillview’s students not only meet stringent college-prep standards, but also set and exceed their own benchmarks, driven by the intellectual vigor that comes from within rather than bent beneath rigor imposed from without. Complementary and connected lower schools in Germantown and Memphis sharpen young minds as they soften social edges in a school culture defined by the Episcopal belief that every child is a child of God and “love thy neighbor” means striving to see the neighbor in every person. Producing disciplined minds, adventurous spirits, and brave hearts, Hillview seeks to shape a new generation of problem-solvers, risk-takers, fence-menders, and dream-chasers: engaged citizens who value the other alongside others, but the courage to meet it as it is And the strength to leave it better than it was.
In the initial concept meeting, the Promise Statement was presented to a subset of the Hillview leadership team in order to obtain feedback before the Accel group headed into the next phase of their branding process.

Based on the feedback it received, the Accel team revised their documents and created a new narrative for the school that would inform all future marketing work. The team identified the “academic identity crisis” as Hillview’s biggest problem, so they decided to focus on the concept of “traditional meets progressive” as the school’s primary descriptor.

Through the data analysis phase, Accel realized that although Hillview used progressive teaching methods, its curriculum was traditional and similar to its peer schools. Accel found a clear way to describe the school that aligned with the larger culture of Memphis. By embracing this brand concept, Hillview would be described as having a “traditional curriculum taught with progressive teaching methods.” This binary definition of the program afforded Hillview the opportunity to attract traditional families while having the chance to teach them about the benefits of progressive teaching. The first page of the school’s new admissions view book offered a simple and clear description of Hillview’s new brand, “Classic content meets active lessons, and sophisticated cognitive theory merges with the simple idea that children learn best when learning is fun” (Hillview View Book, 2015, p.3).

This “Create Phase” continued as the work was then passed along to writers and designers. They turned this concept into sample marketing material. The creative team worked across several media, including the school’s website, admissions materials, viewbooks, letterhead, social media, and revised logos. The concept of “traditional meets progressive” was placed front and center in all marketing work. Accel incorporated an image of two intertwined strands into all printed materials, symbolizing the intersection of old and new. Two different examples of these strands are shown in Figures 2 and 3 below.
After six weeks, the Accel group completed their first marketing materials. At this point, these documents remained in draft form with the understanding that members of the Hillview leadership team would offer feedback about them. The driving force behind the marketing work was the idea of “traditional meets progressive.” Specifically, Accel emphasized Hillview’s classic independent school curriculum taught with progressive pedagogy.
Phase 3: Applying

Accel Group scheduled a "concept meeting" to present the finalized concept and materials to the Hillview leadership team. On March 8, 2015, Accel's executive director led a three-hour presentation at Hillview that presented the group's findings, the new concept, and the new marketing materials. The presentation consisted of the following five parts:

What is branding?

Accel started by giving a general overview of branding. The goal was to explain to the leadership team that all experiences at the Hillview School must illustrate the school's story. This was also meant to give the group a good understanding of the branding process.

Becoming a category of one

Accel suggested that Hillview School should stop competing with other schools in the Memphis area. Instead, they were urged to focus on ways to differentiate the school so that the school could rank at the top of its own category. Accel's founder challenged the leadership team to think about contrasting the school, rather than comparing it with others.

Traditional curriculum with progressive teaching

Accel then revealed the concept that would guide all of Hillview's subsequent branding and marketing work. Since the Memphis community was wary of Hillview’s progressive curriculum, Accel suggested that the school be presented as a sensible mix of progressive and traditional.

Photographs

The team presented photographs from their photo shoot and explained the overall artistic vision. Since the school would be pushing a mix of traditional and progressive, many of the pictures included activities which were somehow representative of rigorous academic learning opportunities balanced with active teaching practices. These pictures became of a photo library that was used for all future marketing projects.
Marketing materials

The presentation ended with a glimpse into the marketing materials that Accel was developing. These marketing materials included website content and design, a new font for the school name, a new color palette, written content for a wide range of publications, and a revised school shield. After all of the materials were shown to the leadership team, there was a two-hour discussion about the findings. The leadership team had an opportunity to offer feedback before moving on, but the team had very little feedback and they were very happy with the presentation.

Once the concepts and designs were approved by the leadership team, Accel began creating marketing materials. Accel delivered a brand guide to Hillview to help the school align all materials and publications with the new brand. Admissions materials were a priority to both Accel and Hillview, so admissions marketing materials were quickly created so that Hillview could use them in the upcoming admissions season. Accel created material in the following areas during the implementation phase:

Printed material

Accel presented a full suite of printed materials, including viewbooks, postcards, special event invitations, direct mail pieces, and revised applications.

Print/sponsorship advertising

Accel recommended more print advertising in the Memphis area. This included over fifteen identified publications for Hillview advertising.

Direct mail advertising

Accel suggested that Hillview engage in direct mail advertising, dropping postcards and other admissions materials in selected venues in and around the Memphis area.

Online advertising

Accel identified ways for Hillview to bolster its online presence by advertising in online publications such as Memphis Magazine and East Memphis Moms Blog.
Social media

Accel recommended that Hillview's communications department develop an online presence through Facebook, Twitter, and assorted blogs.

In April, Hillview’s communications director planned a meeting for faculty and staff about the results of the branding initiative. The faculty was led through a simplified version of Accel’s concept meeting. The Director of Communications talked about the new brand concept and showed the faculty and staff the new marketing material. A few weeks after the presentation, faculty and staff voiced concern about the new brand concept. Members of the community also raised objections to the new color palette and the revisions to the school shield. Hillview administration decided to bring Accel’s executive director back to campus to present the new brand and marketing materials. It was hoped that the faculty and staff would become more engaged with the brand after hearing directly from the Accel’s CEO.

This meeting on May 27, 2015, marked the end of the branding initiative. The Hillview School stayed in touch with the Accel group throughout the following year to design additional marketing materials for the school. Since the branding initiative, the Hillview School has had two admissions seasons to use the new materials. Table 8 shows that the initiative has been successful.
Table 9

*Pre and Post Branding Figures*

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CHAPTER 5

FINDINGS

The Success of the Initiative

Before discussing the findings of this study, it is important to discuss Hillview’s branding initiative in relation to my selected definition for successful branding. According to Chapleo, successful branding is, “clear and consistent in demonstrating distinct competitive advantage and congruous with the needs of various customer stakeholder groups” (Chapleo, 2010, p. 5). Judged by this standard, Hillview’s branding initiative was a successful one.

Consistent Competitive Advantage

Accel’s work gave Hillview the ability to focus on a differentiating characteristic of their brand. It was decided that Hillview’s brand would center around a “traditional meets progressive” way of learning. There was a fair amount of faculty resistance in the initial launch of the branding materials, but Hillview’s Head of School was able to broadcast the brand messaging throughout the school community. In year two of the branding work, faculty and parents report that many members of the community began using the brand messaging consistently.

Clear Competitive Advantage

Hillview’s Director of Communication worked with Accel to clarify the language about the school’s brand. She did so by offering multiple opportunities for the Head of School to clearly and concisely define the school’s differentiator to the community. This was done through emails, presentations, and remarks. The communications director also arranged presentations for faculty and staff to understand the brand identity. Though this was difficult at first, the teachers began to
slowly incorporate this language into their daily vocabulary. The school was better able to clearly
differentiate itself after Accel’s brand initiative.

**Congruous with Needs of Stakeholders**

In order to better describe the academic program to prospective applicants, the school
reframed its academic narrative as being traditional *and* progressive. This allowed the school to
appeal to a wider audience of families who were not necessarily looking for a progressive school.
By developing the brand of the school, Hillview was able to fit the needs of a wider group of
families in the Memphis area.

Based on my observations and on Chapleo’s definition of successful branding, I believe
that the work at Hillview was successful. However, there are a number of complicating findings
that emerged from my data collection. After examining interview transcripts, site documents, and
the narrative of the branding initiative, I was able to extract major findings from the data, one that
points to attributes of this branding process that contributed to its success and several that point
to branding work that could have been more successful.

**Refining Hillview’s Brand: Aligning with Memphis’s Value of Traditional Education**

Accel realized early in the process that it would be important to look closely at the values
of traditional education in Memphis. Almost all of Hillview’s surrounding peer schools boasted a
more traditional educational experience. Since an innovative pedagogical approach is unique to
Hillview and contributes to the school’s reputation, Accel immediately began looking at the
perception of traditional education in the Memphis area. Accel took a close look at Memphis’s
culture before beginning the branding project at Hillview. Anthropologist Alfred Kroeber (1952)
offers a definition of culture that I use in this study:

> Culture consists of patterns, explicit and implicit, of and for behavior acquired and
transmitted by symbols, constituting the distinctive achievement of human
groups, including their embodiment in artifacts; the essential core of culture consists of traditional (i.e. historically derived and selected) ideas and especially their attached values; culture systems may, on the one hand, be considered as products of action, on the other as conditioning elements of further action.

Nearly all of the top private schools in the Memphis area are “traditional,” and many of them are single-sex schools. Memphis residents take great pride in the strong “traditional” reputations of their private schools, most of which were started in response to public school desegregation. When asked, participants provided a wide range of definitions for the word traditional. For example, a Hillview school administrator defined “traditional” as, “Schools that promote teachers at the front of the room and lots of work” (Lower school head). A teacher described traditional schools as, “Having mindless work, assigning tons of homework just to seem rigorous” (Teacher interview). While other members of the school community more or less described “traditional” schools along these lines, a number of participants pointed out that traditional schools in Memphis had the strongest enrollment.

It is true that Memphis has a large number of traditional independent schools. Many of these schools have been around since the early 1900s and have retained their traditional roots. The curricula at these schools have remained fairly traditional, consisting of a standard college preparatory program. The teaching methods have remained traditional as well, with an emphasis on rigorous academic program that highlights independent work and mastery of a wide range of concepts. These schools have strong college matriculation rates, and they place students in many colleges in southern states and all over the country.

In stark contrast, Hillview was described as a progressive school by participants from both the school community and the Accel Group. After a three-day visit to Hillview, consultants from the Accel Group wrote the Accel Group Reflection Paper, which described Hillview’s classrooms as progressive, adding, “This school is collaborative, active, experiential, and loud. Almost everyone at Hillview describes the engaging and updated curriculum with words that signal a break from tradition” (Accel Group Reflection Paper, 2015, p.11). It described Hillview’s instruction as student-centered and noted that it uses progressive teaching methods such as project-based and inquiry-based learning. “Faculty members express a strong commitment to
sheparding students away from their desks into the role of the scientist, the explorer, the artist, the entrepreneur” (Accel Group Reflection Paper, 2014, p. 3).

The Accel Group worked to unpack the culture of Memphis in order to effectively position this progressive school in a traditional setting. They found that the underlying issue was an assumption that using progressive teaching methods leads to a less rigorous education. According to the Accel Group, clearing up this misconception was a top priority. “Phrases like ‘cross-curricular studies’ and ‘experiential learning’ lose much in translation, particularly in a city more accustomed to traditional methods of instruction” (Accel Group Reflection Paper, 2015 p.7). The internal school community also understood this to be an issue. A teacher said, “Families will sometimes question why we don’t have three hours of homework a night. They wonder if this maybe makes us less academic.” The Accel Group attributed enrollment issues to widespread misunderstanding of progressive education. It seemed that, while many considered the schools to be academically rigorous, others viewed the schools as having a warm and progressive feel.

While many participants mentioned Hillview’s reputation as being “hard,” an equal number suggested the school is actually more identified with a warm and fuzzy environment than a challenging academic program. (Accel Group Reflection Paper, p. 14)

The dissonance between the traditional character of the city and the progressive spirit of the school prompted Accel to focus on external messaging. “These progressive experiences deserve a richer depiction” (Accel Group Reflection Paper, 2015, p. 18). However, the admissions office’s open houses and campus tours were not enough to educate potential applicants’ families about progressive education. The Lower School Head explained that it is difficult to describe the experience when many prospective families do not take the opportunity to visit the campus.

I don't find a lot of the Memphis families to be spending a lot of time researching options. They tend to be going on reputation and tradition. Many families don't even give us a shot and I think that’s an important thing that was considered.

By digging deeply into the traditional culture of Memphis, Accel was able to position the school in a way that appealed to the Memphis community. This new position gave the internal community a shared language to use when describing the school and helped to increase applications for the next school year.
Faculty Engagement in the Branding Process

Faculty engagement is essential to brand and it’s what distinguishes brand from an advertising campaign. Therefore, difficult or not, it has to be part of the process. (Branding Consultant)

In spite of the favorable outcome of the branding work, there was one major roadblock along the way. Study participants from the school reported that as Hillview began to implement the new branding strategy, it encountered resistance from the internal school community. The Chief Financial Officer told me about the pushback on some of the branding content, both the narrative that emerged from branding work and the new designs in the marketing materials. Hillview eventually got cooperation it needed, but it took some work.

Yes, we got pushback. One example is our school shield. Teachers didn’t see the shield in the new marketing materials and they were stunned. Believe me – this was a small change to the shield, but the teachers pushed back to the point that we ended up throwing out the idea. We still haven’t launched the new shield because people were so upset.

Others within the Hillview community also raised this example with me. Teachers referred to the shield as an example of implementation difficulties.

I have to tell you, we were all shocked when we saw the shield. It just wasn’t us and someone should have told us about this months before. Maybe it would have saved them some time. (teacher interview)

A number of faculty members and administrators agreed that the school shield was a bone of contention. Teachers claimed that the new shield looked nothing like the old one; to many people, it looked cartoonish. A number of parents mentioned in their interviews that the new design lost the gravitas of the older Hillview shield. Sarah, the communications director at Hillview, describes the resistance surrounding the shield.

During the concepts presentation to the administrative team in March 2015, the Accel team emphasized Hillview’s progressive curriculum. The meta-concept and color palette were suggested as a way to put Hillview into our own niche rather than constantly relying on a shield logo that looked very traditional and very similar to all the other school choices. Accel recognized this and suggested a simplified version. Accel also suggested dialing back on the use of the shield, and they offered a revised shield that was taupe, green, and turquoise and that matched the new color palette. While there was great agreement about the overall concepts that Accel presented, there was disagreement over the revised shield and Accel suggested that we table the shield. We made a strategic
decision to move quickly forward with the overall Accel concepts, even if we didn’t have everything buttoned up, graphically speaking. (Director of Communications).

The shield never made it to the student or parent community. Many members of the community felt that the new shield looked childish and “cartoony.” The flashy colors and modernized lines turned off many faculty members. After getting negative feedback from faculty members and trustees, Hillview decided not to show it to the parent body. They realized that there was great attachment to the old shield. Figures 4 and 5 are images of the old shield and Accel’s proposed shield.

![Old Hillview Shield](image)

*Figure 4. Old Hillview shield.*
Beyond specific parts of the new brand, Hillview faculty seemed to be resistant to the general idea of branding.

I know there was an overall resistance to the presentation. I remember that the head of school sent out a document – a long document – for everyone to read. I remember folks having conversations about not even wanting to read it. I can tell you right now that most teachers didn’t. By then, many people didn’t care (teacher interview 1).

Accel also noticed some pushback even on more granular issues like the proposed color scheme.

One of the biggest problems would have been the change in the color scheme. There was probably lots of confusion about the difference between school colors and marketing colors. The community could not understand how we could start using pastel colors in our materials. It was not good. (Pam, Consultant)

At this point, Accel and Hillview agreed that they needed to regroup. They decided to take a step back in an effort to try again with the faculty. They started this work by inviting the head of Accel to come back to campus to present the brand again to faculty and staff. Over time, Hillview has gained the support and trust of the faculty regarding the new branding work.

Many of this study's participants attributed the faculty pushback to the timing of faculty involvement in the branding process.

For some people, that time when Accel was here explaining the [products of the] branding [work], it was the first time that anybody had heard of it. They knew that there was this marketing thing going on, but for some people, they were so far removed from it...
that this was the first introduction to the larger group. (Director of Learning Resources interview).

According to this administrator, keeping the internal community informed about the goals and process of this effort along the way would have prevented the pushback that the school had to deal with. Teachers articulated this as well.

Including teachers more on the front end would change things dramatically, because then it changes it from an only an administrative moment to a key community moment. You have lots of different people who have different jobs here. Not even just teaching jobs (Teacher interview).

Teacher participants told me about discovering that only administrators had been included in “key” conversations. A Hillview teacher described an “us vs. them” dynamic that added to the teacher resistance.

Many Hillview administrators and Accel participants acknowledged to me that the late conversations with faculty played a major role in evoking faculty resistance. As noted in the context chapter, Hillview’s previous Head of School resigned two months into the branding initiative. A number of people blamed the sudden head of school search for overshadowing the faculty engagement work. The branding process was put on the back burner while the school was scrambling through the search process. This sentiment was shared by members of the Accel team and the Hillview community.

We were in the middle of a head search at that point. I think that probably, if we dropped any balls, it was the faculty piece. Not that they weren't very involved in the process, because I think what we got from Accel came directly from the teachers. I don't know if we did as good a job as we expected (Communications interview).

Teachers also mentioned the lack of communication throughout the branding process. Having been left out of conversations during the discovery phase, faculty members felt that more communication through the branding process would have been helpful.

Another part of it could be more communication about the process, all the way through. You know? Also making sure that people are getting regular updates, and people are seeing the progression and seeing how it connects. Then it wouldn't be such a surprise (Teacher interview).

A number of teachers noted the need for better communication throughout the branding process. They revealed that there was a concern about holding on to important values of Hillview
that they attributed to things like the shield. The shield represented academic rigor and solid programming; a wide range of community members were reluctant to change the look of the school, including the school colors.

One administrator pointed to the dangers of under-communicating with any group of people through the change process.

We should have been updating the faculty throughout the process. What I was reminded of in this process was that people are actually suspicious and worried that a major change is coming as opposed to redefining the good work that we already do (guidance, p, 5).

I was impressed with the openness and candor of the school community, especially a senior administrator who had been at the school for many years. She described the missed opportunity in faculty engagement.

Could we have done it earlier, where it was so much ingrained with what the entire school needed to be engaged in? Sure. We probably would have had more buy in. (Learning Team interview).

In the end, faculty members at Hillview felt more comfortable with the branding work, but by engaging faculty only late in the process, unnecessary time was spent on gaining cooperation during the first phase of implementation.

What is True Faculty Engagement?

Participants shared a wide range of perspectives with me on faculty engagement during this branding process, particularly regarding what it really means to involve the faculty in the branding process. On that subject, there seemed to be a discrepancy between the perspectives of faculty, leadership, and the Accel Group.

Many members of the school’s leadership team felt strongly that the faculty was in fact engaged appropriately in the work. Administrators pointed to the beginning of the process, when Accel was on Hillview’s campus for interviews and focus groups.

We absolutely did give a portion of time to the faculty and staff. They were considered in those different focus groups between faculty, admin, parents, and students. That was part of the process. It certainly had a voice in shaping, and explaining, to Accel the DNA of this school. I would say that in a very positive, effective way. Everything we worked with came directly from the faculty. (Leadership Team interview).
According to this school administrator, the faculty was effectively incorporated into the process. Some school administrators felt that interviewing faculty in the research phase was a reasonable amount of faculty engagement.

Accel team members agreed with this assessment and pointed to the discovery phase as sufficient engagement for faculty members.

What we find is when we create the brand promise, we are really using what people tell us. We're not cherry-picking language here; it’s what they’ve already told us when we were on campus. (Pam, Accel Consultant)

Accel, like the school administration, agreed that the research phase included the full voice of the faculty. “The faculty was not involved in the concept phase. They of course were very much involved in the whole gathering of data” (previous Head of School interview). Yet, administrators described conversations that they had had with faculty members that indicated feelings of exclusion.

We were pulling the teachers into the interviewing process in the beginning, but I heard that they still felt left out. There can always be a difference between what we’re saying and how somebody receives it. We have to remember, in those moments, that that then becomes their reality. It doesn't matter what we say. It's what they heard. (Guidance Counselor interview).

The teachers confirmed this. Although they had been interviewed during the data collection phase, they were not consulted again until the brand was finalized. The Director of Communications defended the position of the teachers.

I think that teachers had a hard time with it because so much time had gone by. Yes – they interviewed them all at the start – but they were not considered throughout the rest of the process. Do you blame them for being surprised or left out? I don’t. (Director of Communications interview).

The real question on display was about the definition of faculty engagement. Different constituencies disagreed about the sufficiency of merely collecting information from the faculty at the start of the project. School leadership and Accel team members felt that the initial interviews were enough, while teachers felt separated from the real work of defining the brand.
The Concept Meeting

Faculty members were given the chance to offer information during their interviews at the beginning of the process, but they were not consulted during subsequent conversations with Accel. These conversations allowed the leadership team to provide feedback to Accel. The first time that anyone from Hillview saw a draft of the brand narrative was in concept meetings with leadership. One leadership team member spoke about the power of this meeting and the strong impact it had on her.

That meeting, oh my. That was very powerful. Because I am sitting in a room of people that, as I said, I spend more time with them than I do my own husband, or my own children. You want to feel like, at the end of the day, that it has been worth it. It gave me the chance to be able to really connect with words, and really connect with the description of what we were hearing, and to finally have it put into words, was just very powerful. It was all the reasons why you get up, and do what you do. Honestly, I will never forget that meeting (Learning Services Director Interview).

A number of leadership team members reported that they had similar experiences. At this meeting, they felt that, with the head of Accel presenting the new brand story, they were connected and pulled into the work. The Director of Admissions stated, “I realized in this meeting that Accel understands our school. They really get us and it gave me goose bumps hear the language for the first time.” The concept meeting was a unique experience for the leadership team that helped them to own the brand work.

In addition to revealing the early draft of the Accel’s work, the concept meeting allowed the school to provide feedback. In At Hillview, the leadership team offered considerable feedback that steered the course of the brand work. While much of the original concept was kept in the final version, there were many parts of the original concept that were changed after feedback from the leadership team.

The concept presentation was interesting. It was interesting to hear how someone else sees your institution, so I enjoyed that. They took us in a really different direction…their process forced us to think about areas where we could grow. Also areas where we maybe sold ourselves short a little bit. I think the most important part of the meeting was tell[ing] Accel what didn’t sit well with us. For the most part, they got it right…but it was important that everyone in the room had a chance to challenge it and move things around. (Director of College Guidance interview).
The space for feedback during the concept meeting seemed to make a big difference. Excluding faculty from this experience was a major contributor to later faculty resistance. Although the teachers did not know about the concept meeting, a few members of the leadership team reflected upon the missing voices in that conversation.

When you really think about it, it’s mostly about recognition of the people who will be carrying this all out in the classrooms. If you think about it, the teachers have a closer look at who we are as a school. I know this seems like a big undertaking to do...but it might have been helpful and interesting to have a few teachers in that meeting.” (Advancement Director interview).

According to members of Accel, getting feedback from the faculty is not usually part of the process. “Things can get very tricky when too many people are involved in these conversations. It’s important to get the opinions of the community, but at some point the leadership team needs to take on a bulk of the work” (Accel Group interview). The leadership team was solely responsible for interacting with Accel in the shaping of the brand. When asked why this was the case, there appeared to have been some resistance on the part of both Accel and Hillview leadership to allowing faculty to give feedback on the concept. This reluctance seemed to center around an anxiety around faculty feedback. Hillview’s Chief Financial Officer described the perceived consequences of eliciting feedback from the faculty.

I think that would open a whole different can of worms. If we went back and added all of the things that everybody said, nothing would get done. Someone could say that the new brand doesn’t talk about the religious identity. Someone else could say that it doesn’t talk about athletics. Then you get back to that laundry list of things that we were trying to get away from. (CFO interview)

There seemed to be a fear of uprooting the branding project if teachers were brought into the process. Both the Accel team and the school leadership team were concerned about having to start over or shift the concept if the faculty took issue with it. One participant came right out and asked, “Well, what if the teachers don’t like it? Then you’re in trouble” (Admissions Director). There was an underlying fear that the entire scope of work could be undone if faculty disapproved.

Some members of the school community agreed with Accel’s hesitation about bringing faculty into the conversation. “You can’t let faculty control the process, because I’m not even sure
it's right for faculty be kind of like extensions of the administration. You want them to have a different perspective, so I don't think there's a simple solution there” (Mark, trustee interview). By limiting the concept phase to a small group, Accel had hoped to limit the feedback to the senior administrators.

When looking at this, another interesting theme emerged from the data. A number of school community members noted that the faculty did not seem interested in reading the reflection paper, which was the written culmination of the branding work. While most of the leadership team was fascinated by the reflection paper, many teachers felt disconnected and uninterested in the document when it was distributed (Director of Learning Services interview). The leadership team seemed to blame the teachers for their disinterest. One senior leadership team member describes her thoughts on this.

They had the opportunity, every opportunity, to opt in. Speaking about the accreditation piece as an example, versus there is just something going on, and you hear about it on the outskirts, but you're not really asked to participate. Does that mean that it doesn't mean much to you, just because you weren't directly involved in it? (Director of Learning Services interview).

I was struck by the level of confusion on the part of Hillview's leadership regarding the response of the faculty. School leaders either failed to see or failed to acknowledge that faculty engagement in the process was limited.

Another administrator offered a similar comment that also captured an us vs. them dynamic:

At the end of all of this, the head of school asked them all to read [the final reflection paper] well in advance of that meeting in the chapel. If people really wanted to know more about the broader initiative, they certainly had a very powerful, deep dive opportunity. All they needed to do was open up, and freaking read it. It is their own choice to have not been more engaged. (Learning Services interview)

It is clear that the leadership team developed deep feelings about the faculty resistance and they developed their own theories for the potential causes.

In conversations with teachers and administrators, I learned that a small group of community members were involved in the shaping of the brand. At the end of the process, members of this small group felt that by showing resistance to the new brand, the teachers were
not honoring this group’s hard work. These administrators also attributed this to teachers’ discomfort with the very idea of branding and marketing. According to a number of participants, administrators believe that teachers did not understand the importance of branding, which led to resistance.

I remember having a conversation with a teacher colleague who was initially put off by the whole idea of marketing and became outwardly negative as they started to see some of the templates of what was happening. It was clearly a fear that Accel was looking to change who we are. I also think that they don’t have a good grasp on branding. I’m not sure she got it. (Director of College Guidance interview)

It was interesting to hear about the strong impact of faculty engagement on the branding process.

It’s possible that more involvement with faculty could lead to more buy in. I would just say it was because it was part of a process. It was part of a collaborative work. Part of all people being included, from the ground up. I believe internal buy-in is critical to the success of a branding project. (Communication Director interview).

**From the Inside Out: Differentiating Messaging to Leverage Internal Branding**

If you get agreement with the internal community and the entire internal community—from the board of trustees to the students, that’s when things start to click. Then you’re starting to sing from the same hymnal. (Accel Project Manager interview)

A major theme that emerged when discussing the success of the branding initiative was the notion of internal branding. According to participants, there are great benefits to making sure that everyone in the school community fully understands the brand’s work. It is also important that internal constituencies personify and demonstrate the revised brand in all of their work. This idea was first mentioned by Hillview’s Director of Admissions.

Schools aren’t a tangible product. If you think about it, we are actually branding relationships and experiences. This makes internal branding a priority at schools. Everyone in the internal community should really understand the brand identity and live it out on a daily basis.

Team members at Accel reinforced this idea, and also pointed to the tricky dynamics that sometimes occurred when informing the internal community after the concept phase. The biggest challenge was noted by the Accel project manager who talked about engaging different constituencies in appropriate ways.
You need to find a way to engage each stakeholder where they are, and that means alums need to be communicated with different than parents, which is different than faculty, so I really take implementation on a stakeholder by stakeholder basis because they’re going to come at it with a different lens. (Christina, Accel Project Manager)

In this case, internal messaging and communication proved to be extremely powerful in the implementation of the new branding work. Ensuring that the entire internal community was aligned with the new messaging allowed Hillview to send a clear and strong message to the external community. By taking a differentiated approach to constituent involvement, Hillview worked with the internal community to clarify and strengthen the brand message from the inside. Parts of this design came through recommendations from Accel, while other parts came directly from Hillview leadership.

**Communication with Faculty**

Hillview’s leadership focused much of its attention on communication with the faculty and staff. Giving faculty and staff language to use when talking about the school emerged as a priority for the implementation. With a large faculty spanning three campuses, arming the teachers with a clear description of the school helped in the branding effort. According to the Lower School Head, having teachers spread the word in the greater community was important.

If teachers are happy and talking about our school in the greater community – there is no better branding than that. We quickly realized that our teachers were talking, even with their teacher friends, about the vision for the school and the direction of the school. Happy teachers can do a lot for you.

Other school administrators pointed out other benefits to having a faculty that clearly understands and speaks about the school’s identity. The school’s guidance counselor explained the importance of having a faculty that fully understands school identity.

Don’t forget that we are also, to a degree, re-recruiting the people who work here and ensuring that they stay on message but also understand the importance of common language and thinking about school in similar ways. As we’re talking to families as we are talking to our teachers. (Director of College Guidance interview).

Hillview leaders, under the direction of incoming Head of School, achieved this by doing two things. First, they continued to focus on keeping a happy culture at the school. Second, they
put their time and energy into helping the internal community understand the brand. Sarah, Hillview’s Director of Communications, commented on this.

How you can use the branding to sort of coach the people already initiated within your community? Can we give them some language to push out into the community when they’re talking about the school? We already knew that our parents and our kids are talking about the school out in the community. It's not that you're not known. We saw this start to happen with teachers once we started giving them the vocabulary.

This part of internal communication took longer than expected, mostly because of pushback against the branding work. “Given that there was some faculty pushback at the beginning, our first job was to make sure that our teachers understand the concept” (current Head of School interview). To do this, the team created opportunities for Accel to present this information to teachers. “Because it's different for every school and every school faculty is a different animal, we need to work on this with schools in various ways” (Christina, Accel Group consultant). Accel and Hillview worked in partnership to come up with methods to infuse the faculty with the new brand work.

The first step was introducing this to the faculty, as laid out by the Lower School Head.

Our rollout consisted of a number of the things that you might expect – a couple of presentations with the entire faculty that present the whole journey with Accel, a document called Hillview’s story, plus the journey with Accel and the major things they found.

This was followed by smaller meetings, which were led by the division directors. They created conversations with their divisions about the brand, using the new language in faculty meeting.

It was very helpful when our division directors began talking about brand at their faculty meetings, and our faculty were asked to talk about their own work. Teachers were asked, “Okay, here is our identity and this is how we do things. Now tell me how you’re doing that in your classroom.” So, it's not just putting it in front of them and saying, “Hey, read this.” It's making them think beyond that: “Tell me how we're doing this. How are you encouraging your classrooms to embrace healthy risks? How are you teaching them that?” And so, they have to really think about it and articulate how they are living out who we say we are. And so, visually, it's in front of them and they are being asked to reflect on how they're living out and all the words that Accel has given us. (Director of Admissions interview).

In addition to word of mouth, giving the faculty language to describe the brand also improved the school itself. Many teachers and administrators described enhancements to the academic program. A Hillview teacher talked about her experience with the brand language.
It took us some time to really wrap our heads around what it all meant. It wasn’t an easy thing to understand, especially for someone like me who has been at the school for a long time. But once it settled in, it actually helped me to talk about the way we do things here. It also helped me focus my work. It was the first time we all had a vision and in a weird way, it was easier for me. I didn’t know that this was something that I needed but after I got it things seemed to make a lot more sense (teacher interview).

In addition to helping to clarify their own language, the brand language also gave teachers a more refined way of discussing students. Hillview’s guidance counselor noted the impact this internal branding had on the way in which teachers spoke about their work. “As I was reviewing course comments for the students who I advise, I could see language that is consistent with the branding language that we’ve been using” (Director of College Guidance interview).

This level of internal clarity was especially powerful for Hillview with its distinctive campus model. With three separate campuses, consistency in programing and messaging was a problem. Hillview’s Director of Admissions described the challenge of having three distinct groups of teachers and the challenges that come along with this model.

We have three campuses and it’s hard to keep up. It is hard to know what's going on every campus and you have a faculty member from one campus who never really had a great reason to go to the other campus, unless we’re inservice or unless we’re doing something that has an all faculty purpose to it. But if you don't have the language to say exactly our approach and what the experience looks like you may have seven different people and get seven descriptions of our program. Giving the internal community the same language had a huge impact on our messaging.

Ensuring that the internal community understood the brand concept also helped to focus the academic program and gave teachers consistent language for what they had already been doing. This consistency allowed for strong messaging from the internal community that projected to the outside community.

This shows anyone looking at Hillview that we think carefully about who their child is – whether she arrives as a three year old or a twelve year old. Having a clear identity on the inside helps out tell our story. (Director of College Guidance interview).

**Communication with Parents**

Just as Hillview attempted to strengthen and clarify the brand through faculty engagement, it also worked to engage parents in brand conversations. The new brand gained momentum through strong messaging directed at the internal parent and student community. In my experience, independent schools rely heavily on word of mouth marketing. Though marketing
efforts like print ads, social media presence, and open houses are helpful for admissions, a number of participants pointed to the importance of word of mouth as a powerful tool for Hillview. Hillview realized throughout the branding process that they would need to focus on strengthening its community’s understanding of the brand, while also monitoring family satisfaction of the school experience. As I describe below, this was done by clarifying brand messaging and allowing for more opportunities to hear about the brand identity. Hillview’s Director of Admissions described why it is important to pay attention to both of these dynamics.

Schools are just like any other business and we need to pay attention to what the people on the inside are saying. I don't know about you, but if I go to a restaurant and I really like the food and I had great service, I'm going to talk about it. It just happens naturally. If someone believes strongly in something and if they have a really, really wonderful experience, they will talk about it and that is the most powerful marketing you can get.

Beyond the customer satisfaction element, participants also mentioned the importance of the ways in which the internal community describes the school. Accel and Hillview worked together to plan ways to educate the internal community on the new brand, such as providing clear language to explain the school. The Lower School Head described the power of word of mouth marketing and connected this to the learning experience.

We are a very word-of-mouth school with typically not a very big budget that has been spent on marketing. The things that we have done [in-house marketing through the admissions office] have largely been in house and there hasn't been any professional help with them. When parents understand our identity and witness the effects of the brand – that’s when people start talking. After this work was done, we were able to keep an eye on the school experience to make sure it matched what we said. There are a lot more people talking about us now and what they are saying is positive and it matches our brand.

As in many other cities, the “word on the street” has a particularly strong impact on the Memphis independent school scene. According to the Director of Advancement, continuing to generate excitement with the parent body proved to be a valuable marketing tool. Arming happy parents with language to use in their social circles made it easier for families to spread the word about Hillview. Although Hillview had already been doing this, the branding work prompted the school to do it in a more thoughtful way.

I often wonder about the amount of marketing versus how much content we are getting out into the cocktail party chatter. One of the biggest things that's been beneficial for us over the years is that parents were really, really happy with our school. This became ever
more important for us when we got the new language from Accel. My opinion is, if your boss is talking about how great a school is, chances are you would probably look into sending your kids there (Lower School Head).

To achieve this, Hillview designed conversations with all internal constituencies. The Accel Project Manager, Christina, offered her thinking about the priorities of designing these conversations.

Hillview needed a concerted, strategic commitment to rolling this out school-wide and that's beyond the communication department. It's all about changing your lexicon. We need to help people change how they communicate about the school. Everybody: faculty, administrators, and parents. If you don't teach them all the language then you're not going to get traction.

She explained why this was so important.

The stakes are so much higher in internal communication when communicating the brand. For families, they spend so much time going through this monster admissions process, thinking carefully about what does my family want, what do I want for my child. After it's all said and done, all they really want is...to defend and celebrate their choice. If the branding is put upon them and it doesn't feel like it's in-line with why they chose the school to begin with and what compelled them to get to yes, then they're going to blow it up. As we say at Accel, it doesn't fit with what they see.

A number of Hillview leadership team members mentioned "school ambassadors" when discussing the importance of including current school families in branding. According to these participants, schools consider current parents to be important players in marketing and messaging. Hillview's Head of School described this as a priority in admissions.

I believe you've got to get that internal marketing piece in place and that's sort of our current work, is to deploy that language. Not just to encourage people who don't know Hillview to think about coming, but how to get the people who are already here initiated into the school on another level so that they become sort of ambassadors for the school. When they start speaking our language – that's when things really got going.

This was reinforced by members of the Accel Group. The team leader described what usually happens with the internal parent body when they are carefully considered during the branding process.

You want to make sure that families are attracted, satisfied and communicated with in a way that they understand what they bought and what makes it special. In the long run, they give and they refer other families, and they're happy alums. (Christina, Accel Project Manager).
At Hillview, parent engagement was strengthened after the rebrand when current parents began to spread the word about the school. The clear brand messaging that was shared with the families allowed them to do this more effectively.

Accel took this a step further by stressing the importance of internal branding with students. Schools rely on current families to spread excitement about the school, but they also need their students to extend messaging in the external community. For example, the Director of Admission spoke of the importance of tours to prospective students and families.

It was fascinating when we got to the point where students were actually using the language when we would stop to speak with them on the admissions tours. You can imagine how powerful it is to hear a student reinforcing ideas that these parents have heard throughout the admissions process. I will never forget a middle schooler talking about the balance of traditional curriculum and progressive teaching. When that tour was over I literally ran to my computer to email Accel. (Director of Admissions interview).

According to members of the Accel Group, the alignment of faculty, families, and students around the school’s brand seemed to be key in the success of the initiative. Accel warned what might happen if Hillview was not able to achieve this level of alignment.

If everyone inside the organization is not on the same page, everything else is a wash. You can have the best marketing in the world, but if the teachers and families aren’t living the experience, then nothing else matters. (Accel Project Manager)

By spending time explaining the new brand concept to the internal community, Hillview was able to saturate the internal community with a clear message about the school. This energy among parents, faculty, and students helped to solidify the school’s identity while also informally communicating to the external community.

**Role of the Head of School**

Members of the Hillview community and team members at Accel spoke highly of the new Head of School and the impact he had on communicating the new brand message to the internal community. According to the founder of Accel, an invested Head of School is key in internal branding.

Just like in organizations, good branding needs a commitment from the CEO and doing it internally first. In the case of schools, the head of school needs to take the lead on this messaging. If the head does this well, when the school becomes market facing,
everybody’s on the same page and understands what they’re doing and why they’re doing it. (Accel’s Founder)

Many participants discussed the importance of the head’s role as driver of the brand. Hillview’s communication director spoke about the parent communications that went out from the Head of School. The new head tried to incorporate new messaging in every email that went out of his office. Additionally, the new Head of School incorporated Accel’s language throughout the admissions process – using language from the Promise Statement in remarks and speeches. By using the language in daily conversation, the leader was able to spread messaging to all constituent groups. The following is an example of communication from the Head of School in a faculty meeting during which he connected teacher engagement to the new brand message:

Choosing the School:
- We will be the right school for teachers who strive to put the needs of each student dead center, every day, every class, every interaction.
- We will be the right school for teachers who want to challenge their own practice whenever there is an opportunity to serve students better.
- We will be the right school for teachers who, though their participation in departments, grade levels, divisions, etc., model the characteristics of great collaborators and colleagues.
- We will be the right school for teachers who are ready to be the reason that a student and family should choose our school.
- We will be the right school for teachers who are deeply aligned with our strategic plan and are earnestly committed to moving it forward.
- We will be the right school for teachers who reach out not only to the students who make it easy on them, but also to all those who don’t.
- We will be the right school for teachers who pitch in when they can, however they can.
- We will be the right school for teachers who strive to be the sort of people we describe in the Portrait of a Graduate.

This language used by the head stresses Accel’s messaging. It mentions the importance of putting students at the center of the learning experience, something that is typical of experiential learning. The notes end with a reference to the “Portrait of a Graduate” document, which stresses the outcomes of a Hillview education.

It was clear from my first conversation with him that the Head of School placed great importance on his role in leading the brand messaging, including communicating with the school’s internal community. He shared his dedication to his school’s internal community.

I’m always trying to tie things back to it in all my spoken language about the school, whether that’s the hour I spend with the faculty a few times a year where we talk about
where we are as a school, to the state of the school and what we're emphasizing this year. Knowing what the strategic plan is, I find the Accel language to be more muscled. So, I tend to use it where sometimes I think schools start to use language of their strategic plan. The language from Accel pretty much puts everyone on an equal standing. What I like about Accel's language is that you can be a faculty member, a parent, a student, friend of the school and all that language feels applicable. This year I'm talking in front of faculty and always tracking back to the Accel language but also bringing focus. (Head of School interview).

Participants from almost every constituency at Hillview praised the head for doing exactly this. Participants described his use of the Accel language in all that he did, allowing the entire community to hear and understand the new messaging. He was able to do this without seeming forced. Hillview’s college guidance counselor described how this language was used for the internal community.

We see it from him at the start of the school, as we're in in-service, and talking through the direction of the school. His language, his comments, the speeches that he delivered, the talks that he's done – it's consistent with that language. At the same time, though, it's still true to who he is. I think that's the delicate line that he walks, making sure that it reads as thoughtful, but not rehearsed. When we started the process, it was my one concern that as we were moving toward using more consistent language, I was slightly worried that it would read scripted. Instead, it read as well thought out (director of college guidance interview).

As the lead storyteller for the organization, the Head of School took responsibility for this messaging, but he also led other administrators in this work. He urged division directors, admissions officers, and even members of the development office to use the language whenever possible. To help keep the new brand messaging central for everyone, the Head of School created documents that contained stories illustrating the new branding work.

We have really been taking the lead from him. He sends out a Friday afternoon email that is consistent with the branding with which we're working. Sometimes it has more Accel language, other times it doesn't. To me, it doesn't always have to, but you get a sense of the look and feel of the school in everything that he puts out. We are all trying to do this in our own way. (Upper School Head)

Hillview’s Director of Admissions mentioned how helpful it was for the Head of School to remind her to always come back to the language.

Even in his communication to families, you'll see the language there. You'll see it in his blog. I feel like he's constantly bringing people back to it in a really intentional way. He and I were recently talking about campus tours and he said, “make sure the admission team is using the language from Accel. It's really powerful. It tells who we are.” I feel like he's constantly directing people back to it, both on a one-on-one level and in a larger venue.
Members of the Accel Group and the members of the Hillview community attribute much of the progress of the marketing and branding work to the hard work of the Head of School. He had a good understanding of the brand process and realized that transmitting the new brand messaging would make or break the whole effort.

I've built it into the equation of logic of whatever I'm saying is of central importance in whatever setting I'm in without repeating it to people like a mantra. It's more about incorporating the brand language into the dialogue of what we're doing - while we're doing it. (Admissions director interview)

Role of the Director of Communications

In my first interview with the founder of the Accel Group, she talked about the importance of having an internal communications person at Hillview working on the brand project. In fact, Accel believes that having someone on the inside an organization managing branding and marketing is one of the most important factors for successful branding work.

For schools, having an internal communications director is an integral part of this work. You would be shocked by how revolutionary that idea is across the country. That is revolutionary, and it floors me every time, but I would say half the schools I've worked with over the nine years, we have had to say, "Someone has to be accountable for internal and external communications." Someone must have that job. We can give you recommendations and suggestions, but unless someone is pushing this work along after we leave, this won’t be sustainable. (Accel Project Manager)

Sarah, Hillview’s Director of Communications, carried this torch throughout the branding process. This was not originally planned, but when Hillview’s previous Head of School left Hillview, Sarah took over the internal project management of the entire branding effort. She provided consistency through the transition and gave Accel a point person to partner with throughout the process. Both school administration and Accel consultants talked about this communications role (and Sarah, specifically) as an important factor in the branding initiative. “It needs to be just that serious, and it's mission critical. That person needs to be on the payroll” (Christina, Accel Project Manager). Accel also noted that this communications person should have a senior administrative rank.

That's why I think you see a lot of directors in communications who are actually sitting on a senior administrative team rather than reporting to a director who then reports to the head. Those are still set up and those can still be incredibly effective, but more and more you're seeing a communication/marketing person sitting at the table reporting out to the
board specifically. Standing up and giving reports of what is happening, and being held accountable (Christina, Accel Project Manager).

Participants from Hillview agreed with Christina’s assessment. A number of school administrators – including Hillview’s Head of School – attributed the success of the branding initiative to the work of the Communications Director. Many praised her for keeping the work going through a tough time of transition. Others noted the way that she perpetuated the momentum of the project even after Accel finished their engagement. A number of staff, including teachers, claimed that the success of the brand was thanks to Sarah’s focus on the work.

What made it successful? Sarah did. Because if you don’t tend it, it’s like anything; if you don’t tend a garden, it’s not going to grow. This requires constant attention and time, because the other thing, there really is no final evaluation with a successful branding initiative. You want to see some numbers grow, but it’s an ever-evolving thing and it’s a commitment to continue to reach the right families, to continue to articulate your selling proposition, to continue to speak to what you believe in and to continue to keep people involved. That was all Sarah. (Director of admissions interview)

The Lower School Head noted that schools, unlike larger corporations, often lack teams that monitor this work.

I think if you were going to be in a corporate environment, you’re going to have a whole marketing division and they're going to be charged with driving the implementation. In schools, if you’re lucky, you have a communications person to work with admissions on this.

Accel’s Project Manager, Christina, described the importance of having an internal person or department to manage a school’s brand.

I mean, think about it; it can't fall to the Director of Development, they're trying to raise money; it can't fall to the Director of Admissions, they're trying to enroll a class, that's by nature their number one goal, and so otherwise it's just easy to let that goal lay on the ground. Somebody’s got to pick it up and hold it.

Internal branding had a powerful effect on Hillview’s project. The branding had a huge impact on the admissions process and school leaders noticed that, after conversations within the school community, they heard their message throughout the campus.

On campus tours you’ll even hear people within our faculty kind of repeating it back to us, which I just don't think was the case before. I think that you had different people who were sharing different pieces of school and maybe they weren't on the same page and so, the external communication was a little cloudy because the internal community didn't have a shared language to use. (Director of Admissions interview).
Making sure that Hillview’s internal community was invested in the brand was a key element of the branding process. Clarifying the brand message for students, faculty, and existing families allowed that message to resonate from within the school. Thanks to Hillview’s Head of School and Director of Communications, successful internal branding led to strong external messaging that did affect admissions. The example of Hillview’s branding initiative provides important themes to better understand advertising and marketing in the school setting.

**Applying the School Branding and Marketing Framework**

My summary of Accel’s branding initiative was structured according to the five stages of this framework. This helped me to analyze the amount of resources and time spent on each of the stages.

You will notice that **Stage 6** from the framework is missing from the summary of Hillview's work; Accel did not include an evaluation step in Hillview's branding process. In fact, there is no evaluation stage in Accel’s regular documented process. It is difficult to say what the impact of this missing step had on Hillview’s initiative, but there are a number of ways that the work could have been strengthened with an evaluation stage. First, because there was no follow-up on the project, there was limited data on the success of the branding working. The only figures that supported the success of the branding work were figures that were collected by the Hillview admissions office. It would have been helpful for the Accel group to collect data in the way that they collected data before the project. This would help the school evaluate the work and to think of next steps.

According to Koler and Fox (1995), it is important to circle back to reflect on the progress of the project throughout the process. This was not done by Accel; from summary of work provided by the school, Accel’s work stopped once the marketing materials were completed and distributed. Further work with the school was limited to redesign and reprinting of school materials. There seems to be a missing evaluation step that would have allowed Accel to think strategically about next steps.
While comparing the branding framework with the process used by Accel, I discovered that majority of Accel’s work can be considered as marketing work. It appears that after the research phase was finished, the Accel group spent a limited amount of time talking to Hillview about the school brand; the conversation about marketing materials happened shortly after the data analysis. To fully understand this, it is important to distinguish marketing from branding.

As a reminder, my working definition of branding is the planned and implemented process of creating a positive image that distinguishes an organization from its competitors, by using careful communication to all stakeholders and by promoting behavior within the organization that aligns with and supports the brand image. Essentially, branding involves the identity and essence of a product. James Heaton, President and Creative Director at a New York City marketing strategy firm, has a simple way of distinguishing the difference between marketing and branding.

Branding should both precede and underlie any marketing effort. Branding is not push, but pull. Branding is the expression of the essential truth or value of an organization, product, or service. It is communication of characteristics, values, and attributes that clarify what this particular brand is and is not. A brand says “this is what I am. This is why I exist. If you agree, if you like me, you can buy me, support me, and recommend me to your friends” (Heaton, 2017).

According to Heaton, the brand should always stay consistent and clear, even as the marketing activity changes over time. “Branding is strategic. Marketing is tactical. Marketing unearths and activates buyers” (Heaton, 2017). In other words, marketing is the process through which companies or organizations communicate the brand to potential buyers.

A majority of Accel’s work focused on marketing, rather than branding. Time spent on Hilliew’s branding was limited to Accel’s internal conversations during their data analysis phase and the concept meeting that included a conversation with school leadership about the “traditional meets progressive” differentiator strategy. Once this conversation was over, Accel seemed to move directly to the application of the new brand ideas to admissions marketing materials.

A more in-depth discussion on the school’s brand could have helped the project in a number of ways. First, the school could have established a more developed differentiator for the school. Though “traditional meets progressive” is a unique characteristic for Hillview, a deeper
conversation about this would have provided a clearer picture of this idea; there seems to be a lack of detail and description to support this new brand identity.

More time exploring the school’s identity could have included more faculty and staff. As I mentioned earlier, the faculty felt that they were not included in the process in a meaningful way. It is quite possible that a more robust investigation of the school’s brand would have involved more people in the work, thus leading to more buy-in from the faculty. In fact, one might argue that more involvement of faculty would be the only way to have a more in depth-conversation about the school’s identity.

By using the framework I created, I was able to look at the branding initiative from through the branding expertise of Daly and Maloney and the marketing experience of Kotler and Ross. After applying this framework, I discovered that the Accel Group would benefit from an evaluative step in their branding process and a process that puts more emphasis on uncovering and developing the brand identity with members of the school community.
CHAPTER 6

RELATIONSHIP TO EXISTING LITERATURE

Throughout this study, I thought back to key pieces of related literature about branding in the corporate world that aligned with the findings of this study. Though the existing literature on branding does not entirely apply to a setting like Hillview, there are a number of similarities that could be helpful in branding independent schools.

Alignment with Corporate Branding Literature

Existing literature about internal branding based in the corporate world has an interesting alignment with my findings regarding the internal school community at Hillview. My findings point to faculty feeling left out of the work. The exclusion, perceived or actual, of the faculty prompted faculty to push back and resist, which then required extensive work to address during the implementation process. Research on internal branding in the corporate world predicts this result. “In an environment where change is the norm, and time to respond or recover is very limited, internal branding requires the same attention as external branding” (Tosti & Stotz, 2001, p.20). Tosti and Stotz are referring to the to the attention that is needed so that the internal community has a common language and understanding of any changes.

Punjaisri and Wilson (2007) describe how in internal branding efforts, employees of corporations are seen as key players in the branding process. “While management can influence employees’ behavioural changes to support the brand promise delivery by the practice of IC [an internal branding process] and training, the study also suggests that [employee] performance is enhanced when they have positive brand attitudes, namely brand identification, brand commitment and brand loyalty” (p. 60).

Research on internal branding in the corporate world has described employee engagement as one way to empower employees to support and demonstrate the brand in their
daily work. Whisman (2009) describes the result of including lower level workers in the process of corporate branding.

“They were enthusiastic about representing the brand values through maintaining what the brand has promised to its client. Not only did they perceive themselves as significant, but they also regarded back-of-the-house employees also as a key component in fulfilling the brand promise” (p. 369).

This observation is echoed in the words of the faculty of Hillview.

My findings also pointed to the importance of internal communication throughout the implementation process. Faculty at Hillview spoke candidly with me about the importance of understanding the new brand messaging. Such internal communication has been highlighted throughout corporate branding research. Additionally, business research has looked closely at the type of communication that is effective for this type of internal communication.

Internal branding is more than a series of communication events. These largely one-way vehicles do not provide the interaction needed to go beyond talk to focused action. Turning a brand promise into practice requires coordinated planning and action at all organizational levels to align leadership practices and individual behaviors with the brand. (Punjaisri and Wilson, 2007, p. 30)

Mitchell (2012) supported this idea and stressed the importance of “weaving the brand messages into employees’ everyday experiences” (p. 101). There is a strong connection between existing corporate literature on internal communication and findings from this study.

Research on corporate branding also discusses the importance of the CEO or president, who must be the lead storyteller in the organization. The literature stresses that for successful branding work, these leader must be deeply involvement in brand messaging. This notion was echoed on Hillview’s campus as most participants mentioned the value of the Head of School spreading new brand messaging and all that he did.

“Although those at the back of house are virtually invisible to customers, they are regarded as significant components of seamless brand promise delivery. One observation is that to ensure that employees can enact brand values to fulfill the brand promise, management have to put an effort in to translating these values into daily activities with which they can then associate” (Punjaisri and Wilson, 2007, p.60).

Hillview’s head of school was successful in giving employees concrete examples of the school’s values. The literature by Punjaisri and Wilson describes how the actions of Hillview’s head of school helped to spread the brand message throughout the school community. There is a
strong alignment between the effective internal communication of Hillview’s head of school and the research on internal communication in organizations.

Alignment to Higher Education Literature

For independent schools, research on branding in higher education is the closest link to existing literature. Studies conducted at universities and colleges reveal findings that are connected to two findings from this study.

Research in higher education is very clear about the importance of engaging the full community in branding initiatives. Whisman (2009) describes this dynamic, but at the college level.

The findings of an extensive research project as part of a branding initiative show that alumni and faculties did not understand the university’s motto at the time. Once the university engaged alumni and faculties to help develop the university’s brand strategy, built from the inside-out, alumni, faculties and others rallied around the brand. (Whisman, 2009, p.268)

Though K-12 independent schools and universities are very different contexts, there are similarities in the ways in which both settings revolve around their faculties. Existing research describes the lesson learned when it comes to involving all members of the community in the branding process.

When universities understand that their most valuable tangible asset is their employees, and when universities engage them in the institution’s brand development process, the most valuable intangible asset becomes internal branding (Whisman2009, p.268).

This description of the value of university branding directly reflects the findings from my case study at Hillview. The internal community of schools could be an intangible asset to branding initiatives in the independent school setting. The words of the faculty members at Hillview described a missed opportunity when they were looked over throughout the branding process. One faculty member’s response says it all: “If they had talked to us about this earlier, it could have saved them a lot of money” (teacher interview). The faculty seemed to understand that they might be an integral part of the branding process. I am certain that they would not be surprised about the findings about internal branding in the university setting.
Implications for Practice: A Different Kind of Branding

The findings of this study signal a need to use targeted strategies when branding schools. It is clear that many brandings strategies that work for products can help to (re)brand and (re)position schools in their crowded markets. There are specific parts of the process on which we could focus in order to successfully brand independent schools. There were several aspects of the branding practice that were especially useful in work at a school.

Faculty at the Center of the Brand

The strongest theme that emerged from this work is the important role of faculty in the branding process. With teachers as the actors of the brand, including faculty in a meaningful way throughout the branding process is central to successful branding work. In my case, faculty and leadership agreed that a more consistent involvement of faculty throughout the branding process would have made for a smoother implementation process. Faculty should be involved, in genuine ways, through the end of the process.

In many ways, teachers hold the most important information about their school’s brand. They are in classrooms living out the brand on a daily basis and have the vocabulary to clarify and sell a brand. I learned through my study of Hillview that it is important to involve the faculty through the entire duration of the process, rather than only in the first stage(s) of the process (e.g., data collection). Including teachers in each part of the process will (1) demystify the process for them, (2) allow branding consultants to receive ongoing feedback from those who know the school best, and (2) contribute to buy in for the final product. The very least, it will avoid creating a perception that those more involved with the branding process do not trust teachers or care about their experience, views and/or opinions.

Truly engaging faculty in the branding process requires many things. Merely asking teachers for input on the identity of the school was clearly not sufficient at Hillview. Creating opportunities for teachers to be involved in the entire process is key. At Hillview, faculty members were involved only at the beginning of the process and were not engaged again until the very end. True faculty engagement can be achieved by giving faculty a voice in the shaping of the
brand – a process that happens well after the *discovery phase*. This likely requires including teachers at the table with administrators in the process, both literally and figuratively.

This will allow teachers to offer feedback on brand work, in real time, throughout the branding process. At Hillview, the faculty was presented with the final product only after final decisions had been made, and they knew it. To know that they have had a voice in the process – and thereby support the development of teacher buy-in – teachers must see that they have been genuinely asked for feedback *that could influence the final product*.

A number of participants told me about reasons why this type of feedback could be (in their view) detrimental to the branding process. I uncovered a fear on the part of school leaders and the branding consultants that opening up for feedback would, as a Trustee told me, “open up a can of worms.” Those who were included in the decision-making phases of the effort were concerned that this could throw the work off track. Some were concerned that soliciting feedback from teachers would create chaos with the work because, as this Trustee told me, you “can’t please everyone.” Asking for feedback from the greater community would create further disappoint, such as when they learned that their feedback was not followed. To avoid the problem of hurt feelings and ignored feedback, school leaders and branding consultants boxed the teachers out completely. The answer to this concern is to frame the teacher feedback process in a clear and transparent way. That is, it is important to include the faculty and ask for feedback, while explaining to them that, while feedback in welcomed and is important to the process, there are other voices at the table, as well.

Fear of hurt feelings or disagreement is simply not a good enough reason to avoid involving of teachers all through the process. By including teachers in a genuine way would reflect a combination of voices, among which the faculty voice which is very important but not the sole one. Clearly outlining the feedback process with teachers would help teachers to participate thoughtfully without expecting their feedback to be the deciding factor. To prepare for a branding process, leadership should convey to teachers that their voices are unique and important, but not the only important voices in the process. Transparency is key.
Many of the school leaders who were involved in the entire process noted that the most powerful part of the branding process was the concept meeting. This is a moment in the branding process when the branding team reveals the new brand identity and other important concepts. This meeting inspired members of the leadership to buy into the process and its resulting products. If we expect teachers to grab ahold of the new branding work to the same extent as the leadership team, it is important that teachers share this important experience. In most cases, teachers are given a less engaging launch, delivered by a member of the leadership team—instead of the more dynamic presentation given by the branding professionals. Exposing teachers to the excitement of the concept meeting will allow them to feel included in this important step and to share the excitement of this key turning point in the branding effort. Accel team members shied away from involving more than a small group in the stage, in fear of including too many opinions at this stage. Just as we can frame solicitation of feedback to faculty, leadership should frame the concept meeting with faculty so they can experience this important step in the process.

Many members of the branding company told me about their disappointment with the responses from teachers after the brand was launched. They thought that teachers were ignoring the tremendous amount of work that had been done. Both they and Hillview leadership knew that teachers did not like the fact that the school was participating in marketing work. It quickly became clear that the teachers did not understand the process or purpose of school branding. This shows that it is important that school leaders and branding consultants demystify the branding process at the beginning of the work.

Why is internal marketing so important? First, because it's the best way to help employees make a powerful emotional connection to the products and services you sell. Without that connection, employees are likely to undermine the expectations set by your advertising. In some cases, this is because they simply don't understand what you have promised the public, so they end up working at cross-purposes. In other cases, it may be they don't actually believe in the brand and feel disengaged or, worse, hostile toward the company. We've found that when people care about and believe in the brand, they're motivated to work harder and their loyalty to the company increases. Employees are unified and inspired by a common sense of purpose and identity” (Mitchell, p.99).

Schools can create a process through which they can engage and educate faculty on the branding process. Here is an example of a process that could help in a school.
1. **Define Branding.** Teachers are not taught in the course of their professional training why marketing or branding is important to independent schools. Rather than blaming our teachers for *not getting it* and punishing them for it (and thereby creating problems down the road), school leaders must educate their faculty on this work before it even starts. This way, teachers may understand the reasons for branding work, how it builds upon the valuable work that they do every day and how it can support the mission of their school. By beginning the school visit with a crash course in the branding process, school leadership could have circumvented pushback from faculty that was likely due to confusion about the process.

2. **Steering Committee.** Assemble a steering committee made up of teachers and academic admin that can work as an academic sounding board. This should represent all divisions of the school and can meet regularly to give feedback about as the branding work is done. This group should be led by the point person on the branding initiative.

3. **Faculty Updates.** This steering committee should be charged with updating the full faculty/staff throughout the entire process. Having these updates come from the steering group (and not leadership or the branding consultants) will help the full community see that faculty is involved in the branding work. It also empowers the steering committee.

4. **Faculty Feedback.** The steering committee, under the direction of consultants and school leaders, can help to unveil the final branding and marketing work, either in small groups or in a full faculty/staff meeting.

**A Balanced Process**

There are several things that are vital to the school branding process that were missing in the process presented in this case study. First, Branding consultants and/or schools should carefully design evaluation mechanisms into their branding work. Schools should make sure that consultants continue to collect data after the brand launch and monitor the progress of the work. It is important to use data to monitor progress and to determine next steps. At the very least,
branding consultants can offer school tools to the school so that the school can monitor this progress internally.

Schools should also be open to evaluation throughout the process. By touching back on the goals of the work and monitoring the project, schools could allow evaluative data to change the course of the work. For example, by evaluating the work at the halfway point, the branding consultant could decide to change the course of the work. Evaluation is an important step in the branding and marketing process and it is important to evaluate throughout the process and at the end.

Second, it is vital to pay close attention to the relationship between marketing and branding. When looking to do branding and marketing work in a school, it is important to brand first, and market second. Before moving on to the creation of admissions brochures and other marketing materials, it is wise to spend ample time with the internal community in order to clearly identify and develop the brand identity. Only after the brand is clearly developed, should the focus move to marketing efforts. Marketing efforts will change from year to year, but articulating the brand identity is an important part of the process that will impact the school for many years.

**Implementing the Brand with Internal Alignment**

Throughout the branding development process and after implementation, internal communication was incredibly important. The internal community (teachers, students, families, trustees, and alumni) need to understand the process and its goals. They must also be understanding of products of this process, so that they can contribute to rollout and longer term implementation. Accel was very successful in doing this at Hillview. Hillview’s new head of school was extremely effective in the process and aligned the internal community with important information about the brand. This lesson learned from the Hillview case should be a strong focus when branding independent schools.

After the considerable work of the brand development process, it is important that everyone understand the new brand position and revised/strengthened brand of the school. This can only occur if the new brand and its associated product are clearly explained to the entire
internal community. It must understand the messaging that the school will focus on and how the school will be positioning itself in its market? If the teachers do not fully understand new branding work, marketing materials and classroom realities may run into conflict. Therefore, schools implementing the brand work should carefully design opportunities for the internal community to learn about the new work. Hillview’s leadership team did this beautifully, by consistently offering learning opportunities for the community. Brand messaging was included in many communications and the head of school spoke to all constituent groups about the major themes of the brand. Independent school branding hinges upon these experiences for the internal community.

As internal communications become more and more important in brand implementation, storytelling likewise becomes more and more important. Not only do leaders need to define the new brand need for the community, but they must explain concrete examples of the new brand. This important storytelling should come from the very top of the organization – directly from the Head of School. He or she must become the primary branding agent for the school by infusing all messaging with aspects of the new brand. The success of Hillview’s branding effort is in part due to the exactly this kind of hard work by its Head of School. Other Heads of School should take the driver’s seat in spreading new messaging throughout both their internal and external school communities. It makes a difference when this comes directly from the top of an organization, and in the case of independent schools, the head of school has the audience to spread new messaging. It is also important that, since everyone in the community is asked to live the brand, that all faculty and staff see the leader doing so.

However, Heads of School are too busy to lead this work on their own. They need someone on staff at school during the brand development process, through implementation and in an ongoing capacity to have primary responsibility for maintaining the school’s brand. For messaging to be consistent, a school must integrate new brand messaging into fundraising, admissions, academics, and external affairs. Someone in a leadership position at school must coordinate and reinforce consistent messaging in all areas of the school. Using a branding company do the expert creative work in the rebrand process is a good first step, but it is not the
end of the process. Having someone from the school community in charge of sustaining the work is key. The director of communications was a major player in the success of Hillview’s branding initiative and other schools should consider having someone on the inside of the institution to drive the work.

**Conclusion**

Corporate branding practices offer a framework for school branding consultants and school leaders who want to make an impact on the brand of their independent schools. Using these practices while paying close attention to specific parts of the school branding process is essential to successfully school branding efforts. Thorough market research, putting faculty at the center of the work, and leveraging both the Head of School and an internal communications coordinator all can contribute to ensuring that the work that goes into school (re)branding initiatives is not wasted, and is in fact fully leveraged to the advantage of the school and its communities.

**Further research**

Conducting a case study at Hillview allowed me to gain a full picture of the branding initiative and the successes and challenges surrounding it. It was helpful to get to know members of the community who were close to the branding work and the staff at Accele who planned and implemented the work. However, there were a number of moments throughout the case study where I found myself asking specific questions about the work. Future research on the topic would help to uncover important details in the school branding process.

Findings of my research suggest benefit may be gained by employing a pair of parallel processes for the internal community. This may address the problem of faculty feeling left out of the branding process and the resulting resistance to parts of the implementation. It may do this while still allowing the “tightened up” academic program that Hillview’s Communications Director and Director of Admissions told me they saw resulting from the branding process was. They
thought that with the clearer school messaging that this branding effort yielded, faculty were able to go about their day-to-day work with a clearer understanding of the brand.

Including faculty in in-depth conversation, even after the discovery phase, about school identity could help to minimize resistance while strengthening the narrative of the school. Future research could look closely at faculty resistance in this setting and unpack exactly what leads to faculty push back.

As discussed above, many participants – from both The Accel Group and The Hillview School leadership team – told me that, in their work, teachers have difficulty understanding branding and marketing. Future research should look carefully at teacher perception of branding and marketing. Unpacking sources of discomfort and potential misconceptions of branding, researchers could figure out how to move through the school branding process with a more informed faculty.

Finally, this case study involved most members of the Hillview community, but it did not include students. The branding work done by Accel did include students in the discovery phase, however. Researchers should look into how students experience and understand both their participation of the brand development process and how their feelings about their schools may have changed as a result of the new school brand. They might also specifically examine how students feel about the very fact that their school is trying to change its brand, what they means to them and how that may have impacted their experience as students at their school.

Conclusion

NAIS has responded to sudden admissions challenges by offering suggestions to bolster independent school enrollment, with branding work being at the top of the list. With limited research on branding initiatives in K-12 independent schools, we must begin looking closely at the unique needs of school branding work. This case study is a first look at the work of a professionally executed branding project at an independent school, and the possible factors that had an impact on the work. Focusing on these factors is an important next step for school leaders
who will be relying on branding and marketing to weather the storm of a quickly changing school choice environment.
## APPENDIX 1

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<th>Participant</th>
<th>Description</th>
<th>Time</th>
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<td>1</td>
<td>Founder and President of the Accel Group</td>
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<td>8</td>
<td>Hillview Director of Learning Services</td>
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<td>Director of College Guidance</td>
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