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Brand and Culture Fusion: How Marketing Directors Lead Brand and Culture Alignment at Private Non-Profit Higher Education Institutions

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A Dissertation by

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"Gratitude opens the door to…the power, the wisdom, the creativity of the universe.

You open the door through gratitude." -Deepak Chopra

ABSTRACT

Brand and Culture Fusion: How Marketing Directors Lead Brand and Culture Alignment at Private Non-Profit Higher Education Institutions

by Erin Marie Hales

Purpose: The purpose of this phenomenological study was to identify and describe, through the lens of activity theory (AT), the challenges and best practices of marketing directors at private, non-profit higher education institutions on how they lead brand and culture alignment.

Methodology: This phenomenological study collected, analyzed, and triangulated data through 15 semi-structured interviews and the collection of artifacts. Data was then coded into themes, frequencies were calculated, and data was organized into the four categories of AT: tools, rules, community, and division of labor.

Findings: Examination of the data found that marketing directors experienced six challenges representing all four AT categories and seven best practices representing three out of the four AT categories. Division of labor and rules represented the most significant challenge marketing directors experienced, and division of labor was the most significant best practice that supported marketing directors leading brand and culture alignment at their private non-profit higher education institution.

Conclusions: Based on the findings and literature of this study, nine conclusions were drawn that offer deeper insight into the challenges and best practices marketing directors encountered as they led brand and culture alignment. The conclusions underscored the importance of authenticity in brand and culture alignment, of proactively building collaborative relationships with key stakeholders, of support from the institution's most senior leaders, of providing the marketing team with sufficient resources and recognizing

their expertise. In addition, the conclusions identified the need for marketing directors to proactively build brand education efforts, including educating new hires upon onboarding.

Recommendations: Further research should be conducted to explore this phenomenon through the lens of other populations, such as vice presidents of marketing, faculty and students. In addition, now that challenges and best practices have been identified, a deeper dive into these items would be beneficial to further define this phenomena.

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CHAPTER I: INTRODUCTION

The higher education landscape is becoming increasingly competitive with significant disruption occurring. Post 9/11 families are having fewer children, resulting in increased competition for higher education enrollment. At the same time, parents are carrying their own student loan debt and the repercussions of the recession created sensitivities to debt versus value in higher education decisions (Huisman, 2020). In 2020, Huisman argued that it can sometimes feel like the "sky is falling" (p. 1) due to changes in the higher education landscape. These changes are further exacerbated by changing expectations with new generations of students.

Higher education institutions are currently serving Generation Z (Gen Z) students, those born between 1997-2012, but they are also planning for Generation Alpha students. Generation Alpha consists of individuals born starting in the early 2010s and through the mid-2020s (Munir & Nudin, 2021). Gen Z is "accustomed to high-tech and multiple information sources, with messages bombarding them from all sides…and they have never lived without the internet" (K. C. Williams & Page, 2011, p. 10). More so than with prior generations, Gen Z has created new imperatives for marketing, as this generation compares options readily online and they "value authenticity and realness" (Williams & Page, 2011, p. 10). Likewise, "the Alpha's were born at the same time iPads were born" (Thomas & Shivani, 2020, p. 80) and they are driven by technology. These two generations are causing marketers to explore the best way to understand them because of how imperative it is to connect with what drives them. Loveland (2017) elaborated on these new expectations, stating Gen Z wants authenticity and they are driven by work and decisions that they believe in. At the same time, Generation Alpha is expected to be

strongly innovative, with a higher level of sophistication, not only around technology, but also around entertainment and education (Thomas & Shivani, 2020).

Flannery (2021) shared the competitive nature of a higher education institution, noting that:

> stand[ing] out, successfully compet[ing], and meet[ing] an institution's goals have never been more critical…and in the wake of a devastating global pandemic that is likely to permanently alter the higher education landscape for years to come, leaders are under intense pressure to ensure steady, or growing enrollments, cultivate greater philanthropic support, grow research funding, and diversify revenue streams all while strengthening institutional reputation. (p. 2)

Huisman (2020) expressed that the "future belongs to nimble institutions with a clear vision, a distinct value proposition and a diverse portfolio of initiatives that fit into a broader strategy" (p. 2). While higher education institutions are used to competing for rank, students, research funding, and faculty, these student expectations have changed and the way institutions market to students. Krücken (2021) argued that higher education institutions need to deploy distinct marketing strategies to attract the right student for their institution. It is not about just finding students; it is the competition to find the right match for the student and the institution. To remain competitive, higher education institutions must have an effective marketing strategy, a distinctive brand, and a healthy institutional culture, all components crafted by a skilled marketing director.

Flannery (2021) asserted that marketing directors at higher education institutions traditionally motivate external and internal constituents to support the institution through enrollment, philanthropy, state appropriations, and research funding, and increasingly

university leaders are understanding that "marketing strategy is institutional strategy" (p. 7). Flannery further argued that smart leaders partner with their marketing directors, and recognize marketing as a strategic function that builds not only reputation, but revenue and other value. Given what is known about the competitive landscape of higher education, coupled with the changing expectations of Gen Z and Generation Alpha, emerging literature suggests that it is crucial that marketing directors integrate brand and culture to stay competitive and reach the new generation of students.

Background

There is a disruption happening in higher education that is changing the course of how institutions are operating.

> Higher education in the United States is built on a long history of strong traditions that have, in many ways, been impervious to outside pressures or influences. Often higher education institutions have served as change agents for society but they, themselves, have functioned with a great deal of autonomy and now find such autonomy challenged. (Craig, 2004, p. 79)

As expectations of students have changed, the way higher education institutions market to students has also continued to advance. Huisman (2020) argued, "Higher education is ripe for innovation. The future belongs to nimble institutions with a clear vision, a distinct value proposition, and frankly, a diverse portfolio of initiatives that fit into a broad strategy" (p. 4). This innovation is essential in order to remain relevant in an increasingly competitive higher education landscape.

According to the Public Policy Institute of California (Johnson & Cuellar Mejia, 2019),

> California's higher education system has three public segments: the University of California (UC), the California State University (CSU), and the California Community Colleges. It also includes more than 150 private nonprofit colleges and about 160 for-profit institutions. In total, the state's colleges and universities enroll almost three million students from a wide range of backgrounds. (p. 1)

The magnitude of these numbers alone has resulted in an increasingly competitive environment to attract and retain students, generate revenue and private donors, and woo top-notch faculty and research dollars. A study conducted by Hanover Research in 2014, titled *Trends in Higher Education Marketing, Recruitment and Technology*, argued that "universities must now go to greater lengths to differentiate themselves from competitor institutions…successful branding can help with increasing enrollment, expanding fundraising abilities, and other outcomes" (p. 5). Although higher education institutions have traditionally considered marketing efforts taboo because those working in academia do not like to view students as customers, these sentiments are quickly changing. The Hanover research study also highlighted that there is an increased institutional focus on hiring marketing professionals to build a strong institutional brand. The underpinnings of the Hanover research study also suggest that branding alone is not enough to survive an increasingly competitive environment. Pucciarelli and Kaplan (2016) suggested that culture is equally as important and share that connecting an institution and its students is essential for the success of an institution's brand because it is the people at the institution who give life to the brand and the experience. Furthermore, "a great brand can make all the difference…but it cannot replace a poor experience" (p. 83). Huisman (2020) explained that potential students should look for institutions that show, and not just tell.

To meet this challenge, institutions may need to display the authenticity of the institution in a way that resonates with the potential student and engages with them in a transparent and responsive way. Furthermore, Yohn (2018) asserted that suggests the key to competitiveness lies in the fusion and alignment of brand and culture.

Higher education. Higher education plays an essential part in shaping American society, pushing the growth of democracy, economic development, and opportunity (Bowen & McPherson, 2017). Although higher education is often viewed as bureaucratic and slow to change and adjust when it comes to business approaches like marketing (Pucciarelli & Kaplan, 2016), the reality is our higher education systems are heavily influenced by fluctuations in technology, economy, politics, and institutional culture. At the same time, there is increasing competition in the higher education institution space, and institutions are competing for areas like enrollment, fundraising dollars, rankings, and societal impact (Krücken, 2021). According to the *US News and World Report* and National Center for Education Statistics, in 2021, there were 3,982 degree-granting institutions in the United States; compared to that of 500 institutions in 1860 (Cohen & Kisker, 2009). This intense growth and change factors have contributed to and will continue to augment the evolution of higher education.

Private non-profit higher education institutions are the oldest higher education institutions in the United States (Clark, 2017) and dominated higher education until the expansion public university systems and private institutions. Levy (2013) highlighted that private non-profit higher education institutions are being threatened by growth in the public and for-profit higher education systems and institutions. Public institutions pose a particular threat because they receive taxpayer subsidies that allow for lower tuition rates

and large university systems benefit from economies of scale. These two elements establish the need for private non-profit higher education institutions to stand out to stay competitive.

Marketing in higher education. With the increase in competition, marketing has come of age in higher education. College and university leaders have been slow to recognize that strategic integrated marking is beneficial for meeting institutional goals (Flannery, 2021). Prior to 2010, marketing was a term that was spoken in hushed tones in higher education institutions because highly educated faculty members did not like to think of education as a product and students as consumer;, however, the resistance to this concept of marketing in higher education institutions is dissolving (Edmiston-Strasser, 2009). Institutions are starting to recognize that to meet the competitive needs of the future of higher education, it will take comprehensive strategic planning, marketing, and brand management efforts that connect with the culture or experience at the institution. It is important to note that this concept goes beyond traditional marketing techniques. McKibben (2005) shared this concept as early as 2005 during a presentation at the American Marketing Association's (AMA's) Symposium on Marketing in Higher Education and expressed:

> Today, effective strategic planning and brand management require more than traditional advertising, marketing, or identity development. Institutions that craft, present and manage a unified brand message, experience and environment achieve a competitive advantage in recruiting, retaining, and building loyalty amongst their students, parents, staff, faculty, alumnae and donors. (p. 1)

McKibben (2005) demonstrated the initiation of growth toward a more strategic mindset about the significance of effective marketing, branding and identity in the higher education landscape. This concept has continued to develop over the last 15 years, highlighting the importance of the leader of the marketing efforts at the institution, also known as the marketing director.

Marketing directors in higher education. In 2015, the *Chronicle of Higher Education* published "Higher Ed Marketing Comes of Age" and contended that increased competition of higher education resulted in the need for skilled marketing directors to partner with institutional leadership to meet the challenges ahead of them. The study stated,

> With competition between colleges surging, institutional and state finances often shaky, student demographics shifting, and pressure to maintain and grow enrollment intense, today's higher-education challenges require the skills and perspectives that marketing departments and their senior marketing executives can bring. (p. 4)

It is the role of the marketing director to help their colleges and universities better tell their stories, but their role does not stop there. A marketing director's areas of influence may include: creative direction, branding and communication, websites, social media and public relations for a variety of departments including admissions, advancement, alumni relations, student affairs, events, athletics, and academic departments across the institution. Marketing directors are required to identify strategy to attract the right students, donors, faculty, and staff. In addition, marketing directors lead the brand strategy at their institutions and serve as the lead brand ambassadors. As such,

marketing directors have the unique opportunity to effect change. They are required to stay up-to-date on traditional as well as new techniques to ensure their work is effective, as they are constantly trying to assess the best way for their institution to stay relevant to the diverse populations they aim to attract and the colleagues they serve. Moreover, Sujchaphong and Sujchaphong (2019) expressed that marketing directors serve as brand leaders that encourage individuals to work in alignment with the institution's brand. Factors like a strong mission, healthy culture, and engaging brand are becoming increasingly more significant.

Branding and higher education. A strong brand is essential to the success of an institution. Chapleo (2015) conveyed that "branding was originally conceived as a technique to convey prestige to manufacturers" (p. 151). The technique has progressed over time, especially in relation to higher education. According to Nguyen, Melewar, and Hemsley-Brown's (2019) book, *Strategic Brand Management in Higher Education*, there are four ways that an institution establishes a strong brand. First, they enhance marketing awareness among their key audiences. Second, they improve their ability to recruit high quality students, faculty and staff, and donors. Third, they differentiate themselves from other institutions. Fourth, by leveraging the first three, the institution increases market share through strong communication of the first three steps. Drori (2013) further underscored the importance of dedicated marketing teams to lead brand management at their institution and argued that branding can create meaningful impact on the identity of an institution. Drori stated that "branding is more than mere fashion, where universities learn marketing practices from firms and other successful universities; rather, branding a meaningful change in the identity of the university" (p. 4). Successful branding in the

higher education environment goes hand-in-hand with a strong marketing strategy. Marketing strategies should leverage the brand of the institution to create departmental level plans to meet strategic goals, build and maintain brand integrity, and strengthen the institution's effectiveness. Marketing directors lead the brand strategy at their institution and understand that it must be aligned with the institution's culture, mission, and values.

Culture and Higher Education. The concept of culture within organizations is believed to hold its roots in anthropology and sociology with contemporary theories that stem from the concept that "organizational culture relies upon bringing life to the richness and the vitality of people living and working together" (Ouchi & Wilkins, 1985, p. 459). Bastedo (2005) suggested that:

> a strong organizational culture provides a degree of social cohesion from a shared set of norms, values, and beliefs. Culture can be used by the university as a marketing tool to demonstrate the special and unique niche to attract new students well suited for the culture of the university. (p. 241)

Yohn (2018) expressed that purpose and values drive organizations, and further argued that every company should have a distinct purpose and core values that guide the organization's operations. An institutional culture reflects what type of work is accomplished, how that work is implemented, and the people within the institution carrying out that work. Moreover, culture is supported by shared norms of individuals at institution. Over 30 years ago, Tierney (1988) conducted a study on organizational culture in higher education, specific to employees. Tierney expressed that the understanding and support of an institutional culture was essential because it allowed administrators to be in a stronger position to keep up with changes in higher education

institutions like enrollment declines, costs increases, and decreasing resources. He further argued that it was important for institutions to identify the significance of institutional culture and how it could impact future institutional growth. These interests around brand and culture have led to increasing exploration on the importance of brand and culture alignment in the higher education market.

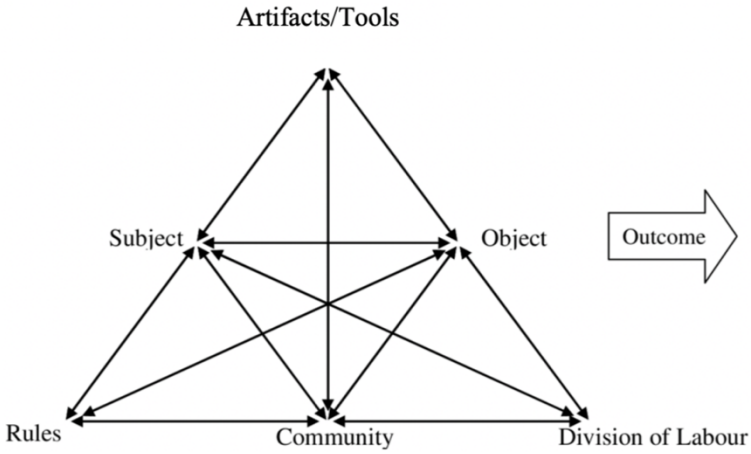
Brand and culture fusion. In 2005, Toma, Dubrow, and Hartley (2005) shared that higher education institutions are better positioned for brand equity, which is how an institution represents itself to produce benefits, and a healthy institutional culture when there is a strong connection between the two areas. Thirteen years later, Denise Lee Yohn (2018) coined the term *brand and culture fusion*. Yohn defined brand and culture fusion as "the full integration and alignment of external brand identity and internal organizational culture" (p. xiii). Yohn further explained that in nuclear physics, fusion is the reaction that happens when two atomic nuclei come together. When fused, the two nuclei create something entirely new. In the same way, an organization can unleash great power when it fuses together its organization's two nuclei: its culture and its brand. Mosley (2007) suggested that connecting these two concepts will only be effective when the ethos of the brand is deeply rooted in the everyday leadership and people management process of the organization. This takes a keen understanding across the institution of the importance of brand and cultural alignment and strong leadership. Yohn further argued that if these areas are not aligned, and marketing leaders are not orchestrating design and operations to support and progress the organization's preferred culture and brand, that the result will be mixed messaging that dilutes any intended

efforts. This begs the question, what is required to successfully fuse brand and culture together in the higher education space and what barriers get in the way?

Activity theory: A theoretical framework. Marketing directors are tasked to lead their institutions' marketing and brand strategy. Moreover, there is an increase in higher education leaders who recognize "marketing strategy is institutional strategy" (Flannery, 2021, p. 7). This change in perspective is imperative to achieve brand awareness; cultivate a healthy culture; meet enrollment and fundraising goals; and attract the right students, faculty, and staff to their institution. Understanding multifaceted concepts like brand and culture alignment benefits from the application of a framework that allows for the full exploration of the concept. One such framework is activity theory (AT). AT is a theoretical framework that was created to help clarify multifaceted systems that involve multiple stakeholders.

AT uses methods of *rules, community, division of labor*, and *tools* that may influence the activity system. Simply described, AT defines "who (subject) is doing what (object), why (outcome), and how (methods)" (Hasan & Kazlauskas, 2014, p. 9). The center of this relationship focuses on the subject, the object and the outcome. An example of Engeström's AT model is depicted in Figure 1.

Figure 1: Engeström's Expended Activity Theory Model



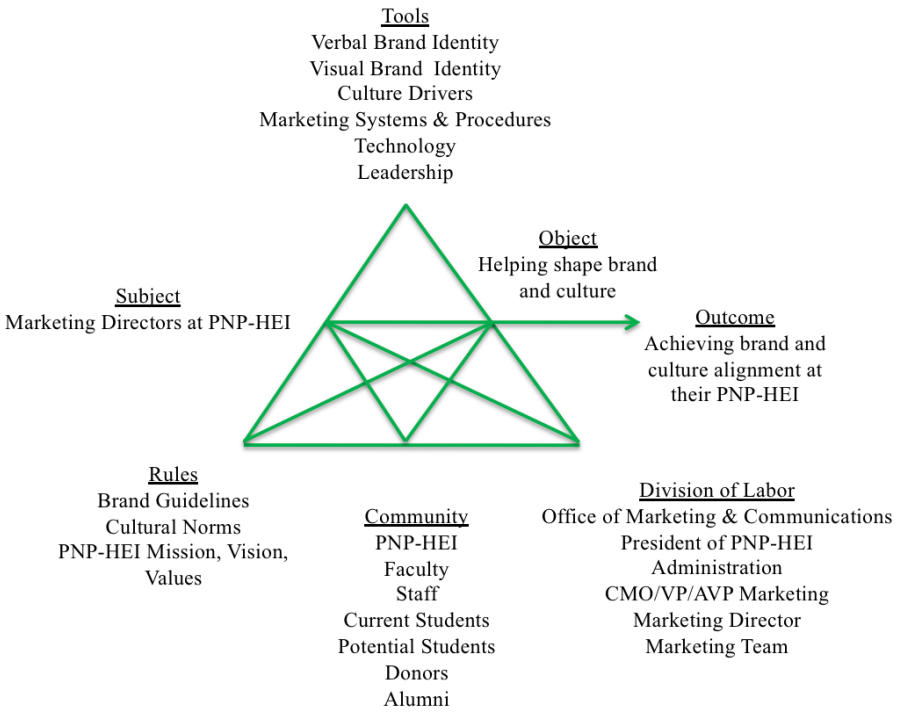
Note. Reprinted from "Work as a Testbench of Activity Theory," by Y. Engeström, 1993, in S. Chaiklin and J. Lave (Eds.), *Understanding Practice: Perspectives on Activity and* Context (p. 65–103). Cambridge, YK: Cambridge University Press. Copyright 1993 by the author.

AT is used to analyze complex issues such as the lived experiences of marketing directors as they lead brand and culture alignment at private non-profit higher education institutions. Figure 2 provides a hypothetical example of how a marketing director could lead and shape brand and culture alignment at their private non-profit higher education institution.

AT as a framework to understanding how marketing directors lead brand and culture alignment. The goal of this study was to expand on AT in educational research with a focus on higher education and provide useful and supportive information to marketing directors at private non-profit higher education institutions to better understand the challenges and best practices experienced by other marketing directors as they work to lead brand and culture alignment, so private non-profit higher education institutions can understand the best path forward to stay competitive and attract the internal and external constituents they desire to stay progressive. It was anticipated that

this AT research would provide a deeper understanding of the challenges and best practices that marketing directors encounter trying to achieve this multifaceted work. AT provides a holistic framework to investigate marketing directors' activities in their efforts to achieve brand and culture alignment at their private non-profit higher education institutions.

Figure 2: A Hypothetical Branding and Culture Activity



Note. This activity identifies potential challenges and best practice systems that interact to either support or hinder the desired outcome, achieving brand and culture alignment.

Statement of Research Problem

In today's rapidly interconnected world, areas like higher education are being exposed to increased competition. This competition, coupled with changing expectations from new generations of students that want their institutions to align and connect with their personal values (Khanna, Jacob, & Yadav, 2014), is requiring institutions to focus on differentiating themselves at greater levels, especially in private non-profit

institutions. As a result, while once resisted by academia, higher education is starting to be viewed as a service where there is active involvement of both the service provider (*institution*) and the consumer (*student*), and marketing is starting to come of age in this unique space. Although progress has been made and applying notions of branding, culture, and marketing to education has started to occur, Simões (2019) shared that it is still viewed as a challenging, controversial, and often-unsuitable approach in many institutions. R. L. Williams and Omar (2014) explained that higher education institutions must employ traditional business theories regarding brand management decisions to remain competitive. To remain competitive, brands for non-profit institutions must be uniquely adapted to reflect the institutional culture and individuality (Chapleo, 2005). However, more recent work suggests that branding alone is not enough and instead marketing directors must focus on aligning brand and culture to produce meaningful and powerful results (Yohn, 2018).

Branding and culture are often viewed as separate entities; however, understanding the power of their connection is crucial in higher education. "Branding is an organization's attempt to tell their story" (Judson, Aurand, Gorchels, & Gordon, 2008, p. 54). Culture generally indicates to a broad connection of principles, standards, and actions regularly led by the organization (Lim, 1995). This brand and culture relationship is where the ethos of the alignment begins.

> Whenever a person encounters a successful corporate brand, standing behind that brand you will find coherence between what the company's top managers want to accomplish in the future and what has always been known or believed by the company's employees. (Hatch & Schultz, 2008, p. 11)

These concepts of brand and culture are ingrained in the corporate world but need to be explored more in higher education, especially how marketing directors play a crucial role in leading this effort.

Ali-Choudhury, Bennett, and Savani (2009) expressed that the most critical decision makers in marketing at higher education institutions, are perhaps the marketing executives or marketing directors who direct and control various areas. Marketing directors serve as the lead brand ambassadors and change agents at institution and have the unique opportunity to effect change through their marketing efforts. Fong (2009) described how marketing is an industry that is continuously evolving and can change quickly. Furthermore, marketing directors are required to stay up-to-date on traditional as well as new techniques when it comes to marketing to ensure their work is effective. These constant changes necessitate the demand for marketing directors to assess the best way for their institution to stay competitive so they can consistently attract the best students, faculty, staff, and donors.

The problem develops that while leaders in higher education believe there are strong changes in demand for the future, there is limited understanding around the clarity that is needed to plan for that future and create action around it (Grawe, 2018). This results in circumstances where marketing directors are often left to their own accord to develop and lead the institution's marketing strategy and branding efforts with little support or theoretical research to build from. Although there is some literature around the importance of fusing brand and culture in higher education, there is limited research exploring how to align brand and culture. In fact, no studies exist that investigate the challenges and best practices of marketing directors at private non-profit higher education

institutions as they lead brand and culture alignment at private non-profit higher education institutions.

Purpose Statement

The purpose of this phenomenological study was to identify and describe, through the lens of AT, the challenges and best practices of marketing directors at private, non-profit higher education institutions on how they lead brand and culture alignment.

Research Questions

1. Through the lens of AT, what are the challenges of marketing directors at private, non-profit higher education institutions on how they lead brand and culture alignment?
2. Through the lens of AT, what are the best practices of marketing directors at private, non-profit higher education institutions on how they lead brand and culture alignment?

Significance of Problem

This study investigated the challenges and best practices of marketing directors leading brand and culture alignment at private non-profit higher education institutions. Recent literature explains that the approach to leading branding and culture efforts has evolved significantly and must remain central in order for marketing directors in higher education to remain competitive and meet the needs of this next generations of students; however, there is no research that delves into best practices for aligning brand and culture in the higher education or private non-profit higher education environments. In addition, the literature fails to elaborate on the challenges that marketing directors face as they lead

brand and cultural alignment at their institutions. This study is significant in a few notable ways.

First, because marketing directors are these defenders of the institutional brand, this study had the potential to bring to light the challenges faced by marketing directors as they work to lead brand and culture alignment at private non-profit higher education institutions. Findings from this study could benefit the decisions marketing directors make daily. For example, should this study reveal that marketing directors play a significant role in leading institutional brand and culture goals, but are understaffed, a conclusion could be made that for private non-profit higher education institutions to be truly effective in leading brand and culture alignment, appropriate staffing decisions should be made.

Second, this study built on previous work by notable researchers in the area of marketing directors and brand and cultural alignment. Ali-Choudhury et al. (2009) specifically shared views on institutional branding and how marketing directors play a crucial role at their institutions and extend the work that argues the importance of brand and cultural alignment because they help drive the image of the institution. More applicable research like this could help institutional leaders understand how to best supervise and support marketing directors in their own institutions. Moreover, it may allow institutional leaders to understand how to best partner with marketing directors to support institutional goals in order to meeting enrollment and fundraising goals and attract top faculty and staff.

Third, practitioners in higher education marketing continue to struggle with brand and culture alignment, as evidenced by Nguyen et al.'s (2019) work regarding the

significance of strategic brand management in higher education institutions. Findings from this study may reveal best practices in brand and culture alignment, thus providing current marketing directors a set of research-proven strategies they can utilize immediately. Nguyen et al. explained that with rising competition, institutions all over the world are branding themselves to create distinctive brand identities that not only allow them to attract the right students, but also attract faculty and staff who align with the culture of the institution. Since this study investigated the best practices of brand and culture alignment within higher education institutions, results may have strong synergy with the work of Nguyen et al. which discussed how branding has an impact on the future expectations of students.

Finally, Dupont (2019) shared that it may take the work of astute brand communicators to observe diligently and ascertain the best way to provide pertinent, authentic communication that emotionally connects with this impending generation. Higher education institutions need to actively plan for this upcoming generation. Moreover, private non-profit higher education institutions face the challenge of changing the culture of the institution of higher education. This generational shift, the continued competitiveness of the higher education landscape, and necessity to have strong brand and culture communicators, may demonstrate the significance of brand and culture alignment at higher education institutions and provide the support marketing directors need to effectively align brand and culture at their institution.

Definitions

This section provides clarity regarding theoretical and operational terms significant to the study. Each definition gives meaning to the terms and concepts when referencing marketing, brand, and culture.

Theoretical definitions.

Activity theory (AT). A strong and descriptive theoretical method that seeks to understand the connection how elements impact an activity in a societal structure. These two elements are classified into one of the following four categories: *tools* (also known as instruments or artifacts), *rules*, *community*, and *division of labor* (Engeström, 1999).

Best practices. For this study, best practices refer to any best practices or positive ways that marketing directors face when leading brand and culture alignment. Best practices might be display through support from the institutional community using the AT categories of *rules*, *community*, *division of labor* or *tools*.

Challenges. For this study, challenges refer to any challenges or difficulties that marketing directors face when leading brand and culture alignment. Challenges might be displayed through a lack of support from the institutional community using the AT categories of *rules*, *community*, *division of labor* or *tools*.

Operational definitions.

Activity. An activity is an intentional form of action between an individual, object, initiative, or purpose.

Admissions. The team of individuals at an institution responsible for the outreach, evaluation, and authority of admitting students.

Advancement. The department responsible for fundraising, endowments and philanthropy at an institution.

Brand/Branding. "A brand is a distinct product, service, or business, and branding is the act of impressing a product, service, or business on the mind of a consumer or set of customers" (Vaid & Campbell, 2003, p. 3).

Brand equity. How an institution represents itself to produce institutional brand benefits (Toma et al., 2005).

Brand identity. Who or what your brand is. This can include, but not be limited to visible elements like logos, colors, design, etc. that help distinguish an institution's brand.

Brand and culture fusion. The full integration and alignment of external brand identity and internal organizational culture (Yohn, 2018).

Community. A connected group of individuals who share common values, work or interests.

Culture. The shared attitude, characteristics, attributes, and values of an organization.

Division of labor. The structure of who does what in relation to an individual, object, initiative, or purpose.

Generation Alpha. The generation succeeding Generation Z, born between 2010-2024.

Generation Z or Gen Z. The generation succeeding Millennials, born between 1995-2009.

***Institutional leadership*.** The key leadership, also referred to as administration or cabinet, of a college or university responsible for the protection and management of the institution.

***Marketing*.** The action or business of promoting a product, service or good using the means of branding, advertising, market research, design, brand management, marketing communications, advertising, public relations, website, digital and social media.

***Marketing department/team*.** The team of people responsible for the promotion of the institution's creative, brand and marketing strategy, policies and initiatives, including, but not limited to: market research, design, brand management, marketing communications, advertising, public relations, website, digital and social media.

***Marketing director*.** The individual who oversees and leads creative, brand and marketing strategy, policies and initiatives, including, but not limited to: market research, design, brand management, marketing communications, advertising, public relations, website, digital and social media.

***Private non-profit higher education institution*.** An institution that is both not-for-profit and tax exempt by using less funding from state and federal funds with the focus on reinvesting those funds into the educational mission of the college or university.

***Rules*.** The cultural norms, rules or regulations leading the goal of an activity.

***Subject*.** The person who carries out the activity in the research.

***Tools*.** The means in which the activity is carried out through artifacts and instruments that are used by the subject.

Delimitations

This study was delimited to marketing directors at private non-profit higher education institutions in the United States. This study was further delimited to: marketing directors at private non-profit higher education institutions in California and have held the title of marketing director at a private non-profit higher education institution within the last 3 years, worked in higher education for at least 1 year, served as a marketing director at their current private non-profit higher education institution in California for at least 1 year, was or is currently in a professional association like the AMA or Public Relations Society of America (PRSA) and must be the primary person responsible for branding at their private non-profit higher education institution.

Organization of Study

This study is organized into five chapters, references, and appendices. Chapter II of this study focuses on a review of literature that outlines each variable associated with this study. It explores the history of higher education in America, along with the development of marketing, branding and culture in higher education. Furthermore, it discusses how AT can be used with marketing directors to provide a greater understanding of the multifaceted marketing issues in higher education. Finally, it examines the literature associated with marketing directors in higher education and the roles and responsibilities leading brand and culture alignment. Chapter III explains the research methodology that was used for this study. Chapter IV presents the examination, discussion, and findings of the study. Finally, Chapter V shares the study's summary, conclusions, implications for action, and recommendations for future research.

CHAPTER II: REVIEW OF THE LITERATURE

Overview

This chapter begins with an overview of the higher education sector. It examines the disruption in higher education and the distinctions between public higher education, for-profit higher education, and private non-profit higher education. Following those areas, it provides a comprehensive summary of marketing, branding, and culture within higher education. It also addresses the leadership of marketing departments, and the works of brand and culture fusion within the higher education sector.

This chapter then considers how marketing directors lead both brand and culture in higher education as well as the unique challenges that private non-profit higher education institutions face when leading brand and culture. Further consideration is presented regarding the increasing challenges for higher education institutions when marketing to the next generation of students. Finally, this chapter discusses the complexities of marketing directors' experiences when leading marketing in higher education around brand and culture alignment and the competencies required of marketing directors who succeed in their roles. It also examines the theoretical framework of AT, which the researcher used to investigate how marketing directors lead brand and culture alignment at their private non-profit higher education institutions. The themes within this literature review are demonstrated utilizing a synthesis matrix (Appendix I). The synthesis matrix was compiled by the researcher and includes essential components of the study.

Introduction

Higher education plays an essential part in shaping American society and is what pushes the growth of democracy, economic development, and opportunity (Bowen & McPherson 2017). Higher education institutions are ever evolving as a function of uncontrollable and changing factors like technology, economy, politics, and cultural, and because of this, it is important to explore the factors creating shifts in the future of higher education (Rustagi & Gautam, 2013). These change factors have contributed and will continue to contribute to the evolution of higher education institutions. Thelin (2011) shared that there is an element of continuity that higher education institutions are always changing, both on purpose and by accident. Moreover, higher education institutions are revisiting their heritage with critical eyes, which can lend for more growth and change when it comes to a higher education institutions marketing, branding and culture.

Types of United States Higher Education Institutions

Higher education encompasses three key sectors: public 4-year institutions, for-profit institutions, and private non-profit 4-year institutions. For the purpose of this study, the researcher is focusing on higher education institutions in California. Table 1 comes from the United States Department of Education's (n.d.) Integrated Postsecondary Education Data System or IPEDS and displays the total number of higher education institutions in California.

Table 1: 2021 IPEDS Reporting: 4-Year California Institutions

4-Year Institution Type	# of Institutions
For-Profit	70
Public	34
Private Non-Profit	145
Total	249

Brewer, Gates, and Goldman (2017) shared the significance of strategy and competition in the higher education landscape, expressing that:

> higher education is a vital part of the U.S. economy and society, critical to our national well-being: it educates our citizens; produces both basic and applied research; supports national security; generates spin-off technology; and helped improve quality of life in communities throughout the country by supporting cultural, recreational, and continuing education activities. (p. 1)

Each of these segments that these authors share demonstrates the immense impact higher education institutions make on society at large.

Public 4-year institutions. According to Best Colleges (n.d.), public 4-year institutions are largely funded by the state governments and hold larger student enrollment. State appropriations remain an important source of revenue for a public 4-year institutions' sustainability (Cheslock & Gianneschi, 2008). Furthermore, the policy initiatives around public 4-year institutions have been a formidable force and shape how these institutions differentiate themselves (Bastedo & Gumprot, 2003). From a conceptual standpoint, the policy initiatives have also driven a focus on "efficiency and effectiveness" to determine how academic programs are added and policies are shaped (p. 342). McKeown (1996) explained that public 4-year institutions were initially seen as a means to distribute public funds but have since grown into more complicated methodologies that range from academic disciplines, levels of enrollment, funding, and institution type.

Hemelt and Marcotte (2016) shared that public institutions enroll the "vast majority of students in American higher education" and cost plays a huge part in

students' decisions to attend that institution (p. 44). Explicitly stated, "State policies affecting the cost of public higher education help shape where students decide to pursue postsecondary education" (p. 66). With cost as a driver that attracts students to public 4-year institutions, it is important to identify that institutions also rely on fundraising and private contributions to offset any funds not provided by state funding because when "tuition dollars cannot be increased further, public higher education institutions become more reliant upon alternative sources of revenue" (Cheslock & Gianneschi, 2008, p. 210).

For-profit institutions. According to Best Colleges (n.d.), for-profit institutions are privately run institutions with shareholders or investors who have the fundamental objective of making money from the institution. They are privately owned and operated by investors who make the decisions on the institution and not educators. Higher education progressed into for-profit institutions over time and these institutions can be disregarded by public institutions. For-profit institutions are more developed in the United States because many other countries do not legally permit for-profit institutions. Additionally, the tax code of an institution drives its profit position, and some U.S. companies are heavily involved and invested in for-profit institutions which is a big distinction around for-profit because they can distribute profits to owners (Kinser & Levy, 2005). Lastly, for-profit institutions hold the freedom to utilize any remaining funds as they see fit, unlike a private non-profit 4-year-year institution for example.

***National and regional accreditation*.** Literature on the subject of for-profit versus public and non-profit institutions also discusses the difference between regional and national accreditation. National accreditation is not generally acknowledged in higher

education and is respected more on a regional level. Figure 3 clarifies distinctions regarding nationally and regionally accredited institutions.

Figure 3: Drexel University Table Demonstrating Differences Between Regional Accreditation Versus National Accreditation

Regionally-Accredited Institution	Nationally-Accredited Institution
Considered the most prestigious and widely-recognized type of accreditation, regionally-accredited schools are reviewed by their designated regional agency.	Nationally-accredited agencies review institutions of a similar type, such as career, vocational, and technical (art & design, nursing, etc.) schools.
May be more expensive than nationally-accredited schools.	May be less expensive than regionally-accredited schools.
More selective during the admissions process.	Has more relaxed admission standards.
Mostly academic, non-profit institutions (must fundraise in order to meet their budget via private donations, federal grants, and legacy giving).	Predominantly for-profit institutions (earn revenue via enrollment or selling educational products). They may also have shareholders they must answer to.
Typically, regionally-accredited schools do not accept credits from nationally-accredited schools. Credits are easily transferred to other regionally-accredited schools.	Typically, nationally-accredited schools will accept credits from both regionally- and nationally-accredited schools. Credits are not transferable to a regionally-accredited college.
Eligible for all corporate tuition reimbursement plans.	Employers do accept nationally accredited degrees, but graduates are not always eligible for corporate tuition reimbursement plans.

Private non-profit 4-year institutions. Private non-profit 4-year educational institutions are registered as 501(c)(3) organizations and cannot benefit private interests because the institutions' assets must always be devoted to charitable purposes and net earnings are not permitted to be dispersed to any owners or shareholders (Kinser & Levy, 2005). Furthermore, private non-profit higher education institutions must use money left over after expenses to continue to build out the institution to further the missions of the non-profit purposes. Additionally, Best Colleges (n.d.) explained that public 4-year institutions are largely funded by the state governments, which differ from private non-profits which rely solely on tuition and donor support to fund programs. Private non-profit higher education institutions enroll "3.4 million full-time equivalent students, or 30 percent of all U.S. students attending 4-year institutions" (Chingos, 2017, p. 1).

Clark (2017) shared that the private, non-profit liberal arts college is the oldest of the institutions for higher education in the U.S, beginning with Harvard (1636), William and Mary (1693), and Yale (1701). The private non-profit higher education institutions model dominated higher education until the expansion of university structures like public and private institutions.

> Still today, in an age of giant universities and mass higher education, these small places retain impressive status in American society and a hold on the hearts of many. The private liberal arts college is *the* romantic element in our educational system. (Clark, 2017, p. 4)

Although Clark references private non-profit higher education institutions as a romantic element, Levy (2013) shared that private non-profit higher education institutions and private non-profit higher education institutions' enrollment are being threatened due to the growth in the higher education system, especially from public and for-profit institutions. Public institutions can be more competitive because they can enroll more students while maintaining a lower tuition, while for-profits may have more access to funds because they can benefit from economies of scale with multiple locations nationally and internationally. These two elements of competition establish the need for private non-profit higher education institutions to stand out more than ever, and as higher education continues to evolve, the need for a way for private non-profit higher education institutions to stay competitive is imperative for continued growth in the higher education landscape. Shah and Nair (2016) shared that private non-profit higher education institutions are a "force to be reckoned with" (p. 323) and that private non-profit higher

education institutions will remain a consistent player that provides a fundamental role in higher education.

Disruption in United States Higher Education

There is disruption happening in higher education that is changing the course of how institutions are operating.

> Higher education in the United States is built on a long history of strong traditions that have, in many ways, been impervious to outside pressures or influences. Often higher education institutions have served as change agents for society but they, themselves, have functioned with a great deal of autonomy and now find such autonomy challenged. (Craig, 2004, p. 79)

Higher education has evolved over the last century and especially in the last 25 years. The expectations of students have changed and the way higher education institutions market to students continues to advance. Huisman (2020) argued,

> Higher education is ripe for innovation. The future belongs to nimble institutions with a clear vision, a distinct value proposition, and frankly, a diverse portfolio of initiatives that fit into a broad strategy, not a haphazard Hail Mary on fourth down. (p. 4)

This innovation, is what is driving change and competition in the higher education landscape. Dew (2012) shared that the changes taking place in society today will continue to drive change in higher education. Furthermore, the needs of society will continue to match the needs to students over time. “Just as higher education altered and grew dramatically in the era immediately after World War II, it will continue to change in

response to the economic, technological, and student-driven changes taking place in society today" (p. 12).

Huisman's (2020) work around vision, value proposition, and strategy demonstrates that higher education leaders should expect the current disruption in higher education to continue. Huisman explained that potential students should look for institutions that show, and not just tell. Showing presents a need to display the authenticity of the institution in a way that resonates with the potential student and engages with them in a transparent and responsive way.

COVID-19 disruption. One of the biggest current disruptions in higher education institutions is COVID-19, which has affected all areas like budget, enrollment, recruiting and research (Blankenberger & Williams, 2020). Blankenberger and Williams (2020) argued that:

> the higher education ecological system is composed of a number of interconnected elements – people, place, physical technology, social technology, wishes and ideas, catastrophe, and personality. The impact of COVID-19 on this system will produce changes in these elements which, in turn will create a series of interconnected reactions by the other elements until this system achieves a new equilibrium. (p. 14)

The current pandemic has also added another layer of disruption in higher education. Flannery (2021) described pressures to

> stand out, successfully compete, and meet an institution's goals have never been more critical…and in the wake of a devastating global pandemic that is likely to permanently alter the higher education landscape for years to come, leaders are

> under intense pressure to ensure steady, or growing enrollments, cultivate greater philanthropic support, grow research funding, and diversify revenue streams all while strengthening institutional reputation. (p. 2)

These key areas of competition around enrollment, philanthropy, research funding, revenue streams, and reputation play a huge part in the continued growth and future of higher education.

Disruption in private non-profit higher education institutions. The literature shows that the disruption in higher education associates with all types of higher education institutions, which includes private non-profit higher education institutions. However, private non-profit higher education institutions have their own specific areas of disruption that are worth identifying. First, Altbach (2005) shared that although the U.S. is often viewed as the center of private non-profit higher education institutions, only 20% of American students study at private non-profit higher education institutions. Moreover, even though many of the "prestigious universities are private...the large majority of students attend public colleges and universities" (p. 2). Additionally, L. Romero and del Rey (2004) expressed that there has been growth of private education in reaction to the strong need for access to higher education without the increase in public funding. Moreover, Chingos (2017) shared that private non-profit higher education institutions plays a significant role and could position themselves to "contribute even more to the nation's educational attainment and economic mobility than it currently does" (p. 1).

Generations

Generations embody significant trends and perspectives that provide insight into how to link people of different ages based on how they are influenced (Washington,

2021). With each new generation, higher education institutions need to adapt to changing needs and expectations. It is important to identify the generations over the last 100 years to provide insight into the evolution and change that have occurred and help higher education leaders stay competitive. According to Munir and Nudin (2021), generations have been tracked since 1890. Table 2 presents the generation classification table from authors Munir and Nudin.

Table 2: Educational Design from Alpha Generation in the Industrial Age 4.0

Generation Name	Births Start	Births End	Youngest Age Today	Oldest Age Today
The Lost Generation of 1914	1890	1915	103	128
The Interbellum Generation	1901	1913	105	117
The Greatest Generation	1910	1924	94	108
The Silent Generation	1925	1945	73	93
Baby Boomer Generation	1946	1964	54	72
Generation X	1965	1979	39	53
Xennials	1975	1985	33	43
Millennials (Generation Y)	1980	1994	24	38
Generation Z	1995	2012	6	23
Generation Alpha	2013	2025	1	5

Generation Z. As time has evolved, each of these aforementioned generations has moved through the higher education market. Most recently, the millennial generation has been replaced in the higher education market by a new generation. Generation Z, or Gen Z, is anticipated to be one of higher education's biggest challenges due to the individual needs of the generation coupled with how institutions will have to shift their thinking in reaching, teaching, supporting and engaging this generation (Swanger, 2018). Furthermore, the research suggests this generation will be the most "radically and ethnically diverse generation in U.S. history…and will be more community-centric" (Rickes, 2016, p. 36).

This generation, driven by technology, is a digital generation that has grown up with digital devices while being dependent on the internet (Zorn, 2017). They have never known a world where they could not instantly connect to the internet, and they prefer virtual interaction versus face to face, which has both adverse and beneficial effects on society (Schwieger & Ladwig, 2018). Loveland (2017) pointed out that this generation wants authenticity, and they are driven by work that they believe in. This "internet generation" (p. 10) has individualities that showcase themselves with freedom of expression with a strong integration of their personal and professional life (dos Reis, 2018). Gen Z will look for meaningful and authentic experiences, more specifically ones that hold a "connecting over a board game, taking a road trip with parents, participating in the arts, or learning how to make and fix things from their grandparents – skills that will be right at home in maker culture and sharing economy" (Rickes, 2016, p. 41). Three key elements drive Generation Z: "culture, purpose and impact which are required to create an engaging and inspiring organization that Gen Z will want to be a part of" (McCrindle & Fell, 2019, p. 19).

Generation Alpha. Right behind Gen Z is another generation, the children of millennials, that is important to identify as higher education looks to their future students. The term Generation Alpha was devised by Mark McCrindle, an Australian social researcher, taking Alpha from the first letter of the Greek alphabet to represent the first generation born entirely in the 21st century (Washington, 2021). Generation Alpha is projected to lead in the number of people on earth, and that growth will continue over time. Similar to their previous generation, Gen Z, technological development and literacy will be very strong (Munir & Nudin, 2021). Educating Generation Alpha will entail a

level of comprehension of the world in which they will be nurtured and educated (A. Romero, 2017). Moreover, though this generation is still new and not college age, they are the successors of Gen Z and will inherit the technology characteristic, but in a more developed form, with parents, educators, and social media holding a large authority in this technology and connection (dos Reis, 2018).

Generation Alpha is expected to be strongly innovative, with a higher level of sophistication, not only around technology but also around entertainment and education, and is expected to be one of the most transformative generations (Thomas & Shivani, 2020). Furthermore, there are expected to be more than 2.5 million Generation Alpha' born each week, and when they are all born by 2025, the number will be almost 2 billion people (McCrindle & Fell, 2019). This generation is expected to be one of the "most formally-educated, technology-supplied and wealthiest generation ever," and will "comprise the largest generation of middle class the world has ever seen…so it is no surprise that even today, marketers and employers are trying to better understand and prepare for Generation Alpha" (p. 25).

Competition

"Competition in academia has always been a force, and universities are used to competing for status and ranking, talent and funding" (Pucciarelli & Kaplan, 2016, p. 314). To remain competitive, higher education institutions need to make a strong effort to understand the next generation of students and their background, needs, and desires, as well as keep an eye on the culture of the newest generations in order to stay relevant and adapt to the challenges of today and tomorrow (A. Romero, 2017). The challenges of tomorrow play a huge role in the competition of higher education. Goldman, Goldman,

Gates, Brewer, and Brewer (2004) asserted that because there are a vast number of students each year who have different needs and demands when choosing a higher education institution, there are many institutions competing to meet those students' needs. Additionally, Krücken (2021) described multiple levels of competition in higher education that center on resources, ranking, external stakeholders, and societal impacts. Each of these concepts drives the competitive need for higher education institutions to deploy distinct marketing strategies to attract the right student for the higher education institution. It is not about just finding students; it is a competition to find the right match for the student and the higher education institution. This competition is also driven by the new generation of students and their expectations around higher education.

Disruption in Leadership

The literature shows that there is further disruption happening around higher education leadership. Antonopoulou, Halkiopoulos, Barlou, and Beligiannis, (2021) shared that the leadership role in higher education is a "crucial parameter" (p. 2) and the evolution of higher education has moved from transactional to transformational, given the rate of change happening and the complexities that higher education leaders face. The authors further argued that transformational leadership has a positive and significant effect on an institution. Additionally, Owusu-Agyeman (2021) discussed the impact that transformational leadership has on innovation at an institution and its impact on areas like engagement, motivation, and communication. Lastly, Sharma and Jain (2022) expressed how transformational leadership can support institutions to live out their purpose and goals as well as contribute to the overall welfare of the institutional community. This

concept around transformational leadership not only is vital in broader higher education, but also directly influences marketing at an institution.

Marketing

"The choice is not whether to market or not to market, for no organization can avoid marketing."

– Kotler & Levy, 1969, p. 15

In 2007, the AMA defined marketing as "the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, marketers, and society at large" (as cited in Gundlach & Wilkie, 2009, p. 262). The practice of marketing is quite ancient, dating back to Greek philosophers like Plato and Aristotle, but the formal study of marketing is more recent, only emerging in the last 100 years (D. B. Jones & Shaw, 2002). In the 1960s, Philip Kotler, commonly recognized as the father of modern-day marketing, asserted that marketing was a concept that was useful for all organizations because it keeps in constant touch with consumers while trying to understand their needs, develop products to meet those needs, and build communication strategies to better explain the purpose of the organization (Kotler & Levy, 1969).

According to Gundlach and Wilkie (2009) in an article titled, "The American Marketing Association's New Definition of Marketing: Perspective and Commentary on the 2007 Revision," this new definition was essential in order to truly reflect the work of those in the field of marketing. Moreover, it:

> dissuades the view that marketing is only a managerial technology by ensuring a broadened view that included not only marketing management, but other

> subdisciplines of marketing thought as well…it positions marketing thought and practice for the future by equipping scholars and practitioners with the capacity to address the ever-increasing complexity of marketing. (p. 263)

These complexities of marketing are about providing a more inclusive understanding of marketing practice, reflecting how marketing provides value to various audiences and reflects the evolution of marketing and how much it has transformed in the last 60 years.

The four Ps of marketing. Understanding the larger picture of marketing requires some general education around marketing theories as well. It is essential to understand the four Ps of marketing, developed by E. J. McCarty but introduced by Neil Borden with his term of "marketing mix" (Borden, 1964, p. 7). McCarthy expanded on Borden's marketing mix with his description of the four Ps of Marketing: *product, price, place* and *promotion* (McCarthy, 1960). *Product* refers to the service between the customer, *price* is the investment the customer makes with the product, *place* is where the delivery of the service takes place, and *promotion* is the communication that occurs to connect with the customer on the product (Zineldin & Philipson, 2007). This concept focuses on the relational component of marketing and satisfying the wants and needs of the customer, which plays a significant role in the place of that customer.

Marketing in higher education. Marketing in higher education is defined as the "analysis, planning, implementation, and control of carefully formulated programs designed to generate voluntary exchange of value with target markets for educational services to achieve the goals of educational institutions" (Dally, Sinaga, & bin Mohd Saudi, 2021, p. 240). Marketing in higher education has evolved over the last 80 years and especially in the last 20 years. Marketing in higher education can be tracked from the

early 1900s. James M. Wood, in a 1939 article published in the *Journal of Higher Education*, discussed the necessity of promotional activities, and though the idea of selling education might be criticized by faculty, it was essential and a "legitimate function of the institution" (p. 412). Polec (2019) explained that many higher education institutions were utilizing marketing and communications practices between 1950-1980, but efforts were often "decentralized and uncoordinated" (p. 22) and marketing in higher education did not develop into a more formal and accepted practice until the 1980s. As marketing in higher education became more sophisticated, it led to the concept that the quality of the institution should be matched with the expectations of students to demonstrate satisfaction with their institution, so educational marketing practices should promote policies and practices that drive student satisfaction and that then supports the overall institutional goals (Dally et al., 2021).

Teresa M. Flannery (2021) described marketing in higher education in her book, *How to Market a University*, arguing that marketing and institutional strategy must align.

> The pressures to stand out, successfully compete, and meet an institution's goals have never been more acute…and in the wake of a devastating global pandemic that is likely to permanently alter the higher education landscape for years to come, leaders are under intense pressure to ensure steady, or growing enrollments, cultivate greater philanthropic support, grow research funding, and diversify revenue streams all while strengthening institutional reputation. (p. 2)

When making the case for the importance of marketing higher education institutions, Van Heerden, Wiese, North, and Jordan (2009) further added that higher education institutions compete for students, staff, and funding, necessitating strategic

marketing practices that supports the institution's image as well as communication that underscores the unique features of the institution to make it more desirable to potential students. Furthermore, higher education has seen a variety of trends in the recent years that have instilled the "growing need for higher education institutions marketing to successfully compete in an increasingly competitive environment" (Berndt & Hollebeek, 2019, p. 143). Pucciarelli and Kaplan (2016) also aligned with Flannery's arguments. They emphasized the need for higher education institutions to employ marketing initiatives to compete in the higher education institutions marketplace, noting that a higher education institution's market standing is a key display of how outside stakeholders view the quality of the higher education institution. Despite widespread agreement that marketing is a key component of remaining competitive in an increasingly disruptive market, Maringe (2004) offered that although higher education institutions have been slow to adapt to a more business-oriented approach in marketing, they have embraced a larger strategic approach, however, some "strategies and structures remain fairly similar to those set out in the 1950's" (Pucciarelli & Kaplan, 2016, p. 314). This underscores the need for further research around marketing in the higher education space.

Seven Ps of marketing. The four Ps of marketing (*product, price, place* and *promotion)* has expanded to the seven Ps of marketing: *product, price, place, promotion, people, process* and *physical evidence* in the research article *The Impact of 7P's of Marketing on the Performance of the Higher Education Institutions*. The *people* represent the type and quality of individuals who will be involved in providing services, the *process* is the method of the service function, and the *physical evidence* which is how the environment is managed. Higher education institutions provide educational services to

customers and there is a need to apply modern marketing principles to achieve the goals on the institution, moreover, the competition around higher education is one of the driving factors of the marketing of educational services (Dally et al., 2021). This evolution of the growing competition of marketing and how it correlates within the higher education market also connects specifically with the audience the institution is marketing to in order to reach their enrollment goals.

Controversies in higher education marketing. Marketing can still be viewed as a taboo word in academia and higher education. Marketing in higher education centers on the audience to which the institution is marketing, and higher education has various audiences depending on the goal of the institution. For example, when recruiting for enrollment, the audience would be the student, but when identifying a potential philanthropic audience, the audience would be the donor.

Flannery (2021) contended that this taboo or biased outlook is really entrenched in a lack of understanding of what marketing really means because traditionally academia viewed marketing as simply just advertising to students. Baldwin (1994) explained how institutions are being inhabited by "interrelated culture of business, industry, and advertising…and some grumbling about the 'corporatization' of institutions" (p. 125). This concept around business practices being applied to higher education is still considered controversial. The sophistication of marketing and the understanding of the importance and strategy behind it is lacking. Simply stated, the goal of marketing in higher education is to consistently and successfully support the reputation of the institution. Moreover, the topic of marketing in higher education is extensive and in the last 10 years, much has evolved regarding marketing in higher education (Tams, 2015).

> Professors typically bridle at the very word ‘marketing,’ much less ‘advertising,’ and for good reason. Marketing and advertising are means to employ persuasion, not toward the good, but amorally, toward a commercial end that may be socially beneficial or harmful. As academic rhetoricians, which all of us are, whatever our disciplines, we mean to alert students to the wiles of persuasion and employ language for the discovery of what is real. But the reality is that we in academe exist in a competitive environment, and while we are painfully aware of certain excesses and compromises that the competition among us encourages, we also are aware that the competition keeps us working to provide a better education for our students. (Weisbuch, 2007, p. 3)

This description drives at the notion of competition and the need for marketing to communicate to future students and impact on the type of education they will receive at the institution.

George (2007) expressed that the public is just as much the customer as the student because of the benefits the public receives from the educational process:

> It becomes a questionable structure for effective higher education once it is recognized that the university has two quite separate educational functions, the best known of these functions – having students leave who are better educated than when they entered – and the less appreciated function – measuring the extent of the education – are markedly different as to their public nature. It is the latter of the two that has the more clearly “public good” characteristics. The public benefits from knowing the levels of education that people attain and thus at least partially, the public is as much the university’s customer as is the student. (p. 975)

The controversy around this concept of the student as the customer is suggested in the literature, but the importance of marketing to the next generation of students to provide institutions with quality students remains a consistent theme in the literature.

Marketing to the next generations. In a research guide written in 2018 titled, *An Insider's Guide to Generation Z and Higher Education,* the authors explained that Generation Z is extremely brand loyal, and they value genuine authenticity in their brands and knowing a brand's value aligns with their own beliefs is key to winning them over (Dombrosky, Templeton, & Fong, 2018). Marketing is a huge component of what drives Gen Z and their decision making; as such, marketing to Generation Z and Generation Alpha will take savvy and strategic leadership in Higher Education. Marketing in a manner that communicates authenticity will be imperative as marketing directors develop strategies to attract future students to their institution. Thomas and Shivani (2020) added, "Marketers must show creativity in their work if they wish to engage with them" (p. 78).

Swanger (2018) shared that "traditional marketing methods will not be effective" (p. 23) with Generation Z students, because it will be more challenging to reach them than previous students due to the lack television and publication reading and the information they do receive comes from the internet through their devices. Moreover, this generation is very "outcome focused" (p. 22), wanting to know the cost of college, how their education will prepare them for their career, and the academics being offered, with their parents very much involved in their decision (Swanger, 2018). Furthermore, authenticity and realness are areas that should drive marketing to this technologically-savvy, global, and diverse generation (K. C. Williams & Page, 2011).

Marketing Leadership

In 2022, SimpsonScarborough, a research, brand, and marketing agency, published *The Higher Ed CMO Study State of Higher Ed Marketing*. The study shared the significance of marketing's role in higher education leadership as well how advancement in the marketing industry was more critical than ever. The study demonstrated that transformational leadership is a key component of the evolution of a marketing leader, sharing "higher education needs more transformational leaders at the helm of marketing communications in order to differentiate their institutions, achieve strategic goals, drive quantifiable performance, and advance the industry as a whole" (p. 27). Simões (2019) also expressed the significance of innovation in higher education, and how marketing and brand leaders "set the tone for behavior and strategic direction" (p. 50). Furthermore, Sujchaphong and Sujchaphong (2019) shared that having a leader who holds the characteristics of a transformational leader is a fundamental aspect which can influence employee behavior. The influence could be provided by an experienced marketing director.

Marketing directors. When leadership focuses on marketing at higher education institutions, is it the marketing leader or the marketing director driving this action. Flannery (2021) pointed out that marketing leaders present marketing in a strategic manner that creates value and allows for more open conversation with institutional leaders, like the president, provost, and administration, to build support and engagement around marketing efforts. Leadership and marketing in higher education are highly relational and support from the top down is essential. Moreover, support for marketing directors and leaders is even more crucial.

Marketing directors are responsible for leading the marketing, communications, and branding efforts for their institution. According to the U.S. Bureau of Labor Statistics (n.d.), it is estimated that a 7% growth is expected from 2019-2029 with marketing directors, and they will continue to be in demand to utilize their expertise on the best way to gain customers. Many times, marketing directors serve as the lead brand ambassadors and change agents at their institution and have the unique opportunity to effect change through their marketing efforts. The need for marketing directors to effectively show the brand promise of an institution and not just tell a potential student what is offered requires strategies to keep the institution moving forward. Fong (2009) expressed how marketing is an industry that is continuously evolving and can change quickly. Furthermore, marketing directors are required to stay up-to-date on traditional as well as new techniques when it comes to marketing to ensure their work is effective for their institution. These constant changes necessitate the demand for marketing directors to assess the best way for the institution to stay competitive so they can consistently attract the best students, faculty, staff, and donors.

In 2015, the *Chronicle of Higher Education* published "Higher Ed Marketing Comes of Age" in partnership with SimpsonScarborough, sharing the increased competition of higher education and the need for skilled marketing directors and leaders to partner with institutional leadership to meet the challenges ahead of them. The study shared that

> with competition between colleges surging, institutional and state finances often shaky, student demographics shifting, and pressure to maintain and grow enrollment intense, today's higher-education challenges require the skills and

> perspectives that marketing departments and their senior marketing executives can bring. (p. 4)

Moreover, it is the role of the marketing directors and marketing leaders to help their colleges and universities better tell their stories, and "like so many other parts of the non-profit sector, colleges and universities have come to realize that they have to compete" (p. 26).

Marketing directors' roles and responsibilities. The literature suggests that the roles and responsibilities of marketing directors, along with the significance of their work at their institution, continue to evolve. For example, Gundlach and Wilkie (2009) shared that the roles, impact, and responsibilities of marketing leaders have changed from this concept of managerial to that of a "thought leader" (p. 263). Marketing directors not only lead the coordination of marketing strategies and services at their institution but, as author Polec (2019) shared, marketing leaders should also contribute to broader institutional strategy and direction. Furthermore, Ali-Choudhury et al. (2009) expressed that marketing directors are viewed as the "most critical decision makers" (p. 2) because it is the marketing director that leads budgets, directs marketing campaigns, and influences institutional leadership, as well as any advertising and communication, and they also play an essential role in student recruitment. Part of this essential role in recruitment should be driven by the private non-profit higher education institution's brand and how marketing directors communicate that brand to their internal and external audiences.

Branding

Establishing and strengthening brands for companies and products is arguably a marketer's most important job.

–C. Jones & Bonevac, 2013, p. 113

According to the research, "a brand is a distinct product, service, or business, and branding is the act of impressing a product, service, or business on the mind of a consumer or set of customers" (Vaid & Campbell, 2003, p. 3). Furthermore, branding is about creating an emotional connection with a key group of customers and a central part of that branding process lies within brand design (Vaid & Campbell, 2003). Additionally, an organizational brand should be a "magnet for enhancing your relationship marketing effort" (Hannan, 2021, p. 52). In addition to strengthening how an organization is identified, brand equity can be augmented through advertising and communication, deploying symbols, and highlighting competitive advantages (Toma et al., 2005).

Branding has been around for centuries, even before the official term of *branding* was used in the modern age (Room, 1998). Room (1998) explained that Greeks and Romans used different manners of promotion when it came to goods like wine or pots, and messaging would be written to promote that person's services. This concept was seen as first usage of branding and continued to grow during the industrial age.

> At the root of all branding activity is the human desire to be someone of consequence, to create a personal and social identity, to present oneself as both like other people (e.g. to belong) and unlike other people (e.g. to stand out), and to have a good reputation. Sign and symbol are essential ingredients of this branding phenomenon. As a form of marketing, branding is richly ramified by application

> to oneself, to other people, and to property; it takes both material and metaphorical forms; and is perceived either positively or negatively (Bastos & Levy, 2012, p. 349)

It is essential to also understand that the notion of branding did not develop as a part of marketing until far into the 20th century (Bastos & Levy, 2012) and the term *brand* did not enter marketing until 1922 (Stern, 2006). According to Chapleo (2015) branding was originally conceived as a technique to convey prestige to manufacturers. However, that concept has evolved to a more modern theory that focuses on more of what an organization is and what it represents and what it is going to be known for (Arild & Marianne, 2009).

> **Branding and higher education.** An institution's brand is described as a: manifestation of the institution's features that distinguish it from others, reflects its capacity to satisfy students' needs, engender trust in its ability to deliver a certain type and level of higher education, and help potential recruits to make wise enrollment decisions. (Bennett & Ali-Choudhury, 2009, p. 4)

The importance of an institutional brand is what drives how the institution functions. Nguyen et al. (2019) argued "brand reputation is the most important determinant of a university's performance" (p. 264). Drori (2013) also connected this concept, explaining that branding is more than just trendy; when institutions learn marketing practices, branding provides a transformation in the distinctiveness of the institution. This distinctiveness leads to the necessity around stronger and more strategic branding practices in higher education and is considered essential to the future of branding in higher education. Pandita and Kiran (2021) shared that branding is "gaining a lot of

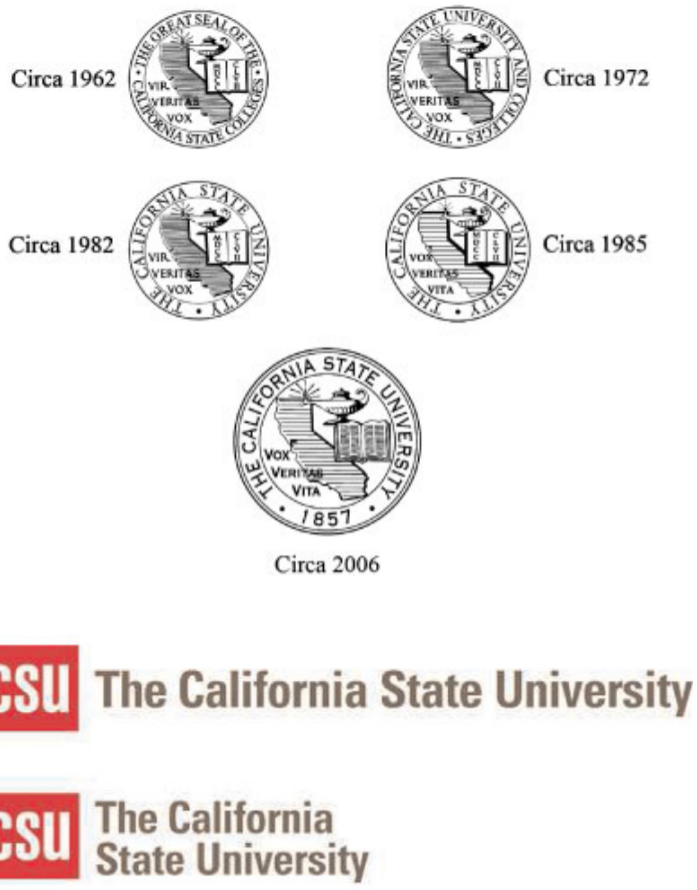
prominence and needs enough attention of the educationalists and policies makers at the global level" (p. 2). Furthermore, branding is supporting the increase as well as the "outreach and reputation through public perception which acts as a measuring technique to sustain the quality management-controlled strategies and procedures" (p. 2). With this increased competition for public perception, differentiation is imperative. In a 2010 article titled, "The California State University: A Case on Branding the Largest Public University System in the US," authors Celly and Knepper (2010) shared that "branding of universities is an area that is growing in importance as competition between universities increases and creates an imperative for strong brand positioning and visual identity as the basis for differentiation" (p. 137).

Institutional branding has increased significantly because institutions have strong demands to meet enrollment goals, manage higher tuition fees, and meet the financial pressures around growth in higher education, which brings along stronger competition and puts pressure on institutions to effectively marketing their programs (Nguyen et al., 2019). Branding private non-profit higher education institutions should demonstrate a true representation of that institution in an authentic manner. Drori (2013) suggested "brands are artifacts that uniquely identify the organization; they are taken to convey the personality of the particular university" (p. 1). The process of building a brand is a marketing strategy where the institution can be presented to interested audiences, like students, donors, and employees. For a brand to work effectively, it must be a clear and compelling image of the higher education institution. Once the brand has been built, the organization has a degree of brand equity, which serves as a resource beyond the organization's financial health and human capital.

Examples of branding initiatives in higher education. In 2009, because of the increased competition between universities and the realization that strong brand positioning was necessary to stay competitive, the CSU system, one of the largest public university systems in the nation, went through a complete visual and verbal identity refresh to globally communicate their value and excellence (Celly & Knepper, 2010). Their branding initiative was brought about by executives experiencing a lack of public knowledge and perception of the CSU and UC systems. This realization by such a force in the higher education space demonstrated the movement of branding and the importance of messaging to differentiate themselves and market themselves to the right audiences. Figure 4 illustrates the evolution of the CSU brand and the refreshed branding.

Contrary to the rebranding of the CSU system was the backlash of the UC system rebranding in 2012. In an article from *Inside Higher Ed*, titled "Logo Revolt," students and alumni started a campaign to eliminate the new symbol for the UC system that had been rebranded after using the original seal for over 140 years. Opponents felt the new logo represented a loss of prestige around the UC system and cheapened the brand of the institutions, while the original logo truly reflected the UC system's values (Jaschik, 2012). Figure 5 illustrates the change from the original UC seal to the new logo from 2012.

Figure 4: California State University Brand Refresh



Note. Reprinted from "The California State University: A Case on Branding the Largest Public University System in the US," by K. S. Celly & B. Knepper, 2010, *International Journal of Nonprofit and Voluntary Sector Marketing, 15*(2), 137-156 (https://doi.org/10.1002/nvsm.375). Copyright 2010 by author.

Figure 5: University of California Seal Refresh

Note. Reprinted from "Logo Revolt," by S. Jaschik, 2012, *Inside Higher Ed* (https://www.insidehighered.com/news/2012/12/10/u-californias-new-logo-sparks-outrage). Copyright 2012 by author.

The trend over the last 12 years has verified the need for branding to underpin all areas of a higher education institution's operations to drive growth and underscored the necessity for strong marketing directors for a higher education institutions to thrive. Anholt (2005) shared this necessity, explaining that branding, "if it is to serve its real purpose in the world, is not something you add on top: it is something that goes underneath" (p .121). Moreover, as the need for strategic branding practices grows, the concept of imbedding the institution's culture and the role it plays within the institutional brand is fundamental to explore.

American University (n.d.), a private non-profit higher education institution and research university located in Washington, DC, was driven to communicate their unique brand in a way that would differentiate themselves, launching their WONK campaign in 2011. "WONK – the word 'KNOW spelled backwards, was a term often associated with policy and experts in other fields and disciplines who were passionate about their subject and used their knowledge to create meaningful change" (Flannery, 2021, p. 99). Successfully run for almost a decade, the WONK brand campaign helped drive enrollment, created alumni engagement, and increased the institution's rankings (Flannery, 2021). Figure 6 is an example of a WONK advertising campaign.

Figure 6: Sample of WONK Brand Campaign Advertising

Note. Reprinted from "Know Wonk," by American University Website, n.d. (https://www.american.edu/ucm/wonk-campaign.cfm). Copyright 2022 by the author.

Examples of branding in higher education within the public and non-profit segments suggest the necessity for higher education institutions to stand out. Bill Faust, from the branding and marketing agency Ologie, shared his thoughts on difficulties that higher education institutions have in staying unique in Flannery's (2021) book, *How to Market a University*, sharing that "higher education wasn't designed to be unique, but be unique within your market" (p. 99). Driving those unique qualities of the institution takes strong leadership, a defined brand and a well-defined culture.

Culture

Culture focuses on a connected set of behaviors, beliefs, and values for an organization. It is the glue that holds everything together (Pascale & Athos, 1981). The concept of culture within organizations is believed to hold its roots in anthropology and sociology with contemporary theories that stem from the concept that "organizational culture relies upon bringing life to the richness and the vitality of people living and

working together" (Ouchi & Wilkins, 1985, p. 459). Culture is not just a buzzword, but has a long historical context and the importance of culture must be taken seriously (Schein, 1990).

Schein (1990) explained that culture is a deep phenomenon, manifested in a variety of behaviors that focus on deep cognitive layers, defining culture as:

> the pattern of basic assumptions that the group has invented, discovered or developed in learning to cope with its problems of external adaption and internal integration, and that has worked well enough to be considered valid, and therefore, to be taught to new members as the correct way to perceive, think and feel in relation to those problems. (pp. 30-31)

Additionally, effective organizations should have strong cultures that can not only attract the right people, but also retain them (Sun, 2008). At the core of a strong culture are shared beliefs and values that help keep an organization grounded.

The earliest works around higher education culture stem from Burton Clark's (2017) book, *The Distinctive College,* published initially in 1970. Prior to Clark, studies were only conducted around student cultures in the 1960s. Clark posed that values are firmly embodied in organizations and guide the thoughts and actions of the people within the institution. Over 50 years later, Clark's research has led many authors to research the impact of organizational culture within higher education.

In 1982, David Dill published an article titled, "The Management of Academic Culture: Notes on the Management of Meaning and Social Integration," where he argued culture has been neglected in academic organizations and there should be support around the understanding that as members of academic communities, that community manages

the academic organization and are responsible for setting that tone at the institution. Furthermore, even back in 1982, there was a concern around the survival of academic institutions, and the need for them to adopt more traditional organizational policies, like healthy organizational culture, to stay relevant and competitive. Areas like culture, strategic planning, and marketing operations management must be viewed from a cohesive standpoint to be better prepared for the future ahead. Moreover, Dill expressed that smaller, private non-profit higher education institutions have established a stronger system around the importance of culture, compared to larger institutions, further supporting the theory around the importance of a healthy culture at private non-profit higher education institutions.

Culture and higher education. When discussing higher education in terms of organizational culture, Tierney (1988) shared that institutions are influenced by strong external influences and these influences originate from values, processes, and goals. An institutional culture should mirror what is done, how it is done, and who is involved in doing it at the institution. Moreover, culture is supported in shared norms at the institution. Bastedo (2005) suggested that a strong institutional culture provides a level of social connection from a collected set of norms, values, and beliefs, which can then be used by the institution as a marketing tool to demonstrate the unique and special way to attract students.

As culture in higher education continues to evolve, it is important to understand that organizational culture is essential to the future of the institution to create an environment that is prepared for innovation, transformation, and achievement of the institution's goals (Craig, 2004). How the private non-profit higher education institutions

community feels about the culture impacts how it is viewed by the outside world. Lamboy (2011) shared that there are:

> Unique attributes an institution presents to the outside community which ultimately impact how one feels about the institution and that students may not remember everything they learn at that institution, but they will remember the environment and the impression the school made on them. (p. 29)

However, culture in higher education can also produce challenges. Masland (1985) shared that institutional culture presents its own challenges because some literature around culture suggests it can be manipulated by administrators and may not be authentic; however, others believe culture is entrenched into the psyche of a group of individuals and it cannot be easily influenced.

Masland (1985) defined culture within higher education as the:

> Persistent patterns of norms, values, practices, beliefs, and assumptions that shape the behavior of individuals and groups in a college or university and provide a frame of reference within which to interpret the meaning of events and actions on and off campus. (p. 6)

The belief that culture is both a process and a product connects with the concept that the culture is shaped by the process of interactions of various groups across the institution, whereas the product part of culture concentrates on the institutions' traditions, history and structure (Masland, 1985). Furthermore, trust is essential within the cultural construct of a private non-profit higher education institution; more specifically group interactions across an institution must be authentic to build trust. Tierney (2008) shared the importance of trust and organizational culture in higher education and creating conditions

where trust can flourish to create a healthy cultural model at the institution. Tierney (2008) asserted that trust is engrossed in the context of culture. Smart and St. John (1996) shared that weak cultures are less distinctive in higher education and also less effective, demonstrating the importance of establishing a strong culture to be effective. Building an authentic culture is an essential component for private non-profit higher education institutions to market effectively using the institutional brand to achieve a fusion between both areas to effectively connect with their internal and external constituents.

Brand and Culture Fusion

Denise Lee Yohn coined the term *brand and culture fusion* in her book, *Fusion – How Integrating Brand and Culture Powers the World's Greatest Companies*. Yohn (2018) define brand and culture fusion as "the full integration and alignment of external brand identity and internal organizational culture" (p. xiii). Yohn further explained that in:

> Nuclear physics, fusion is the reaction that happens when two atomic nuclei come together. When fused, the two nuclei create something entirely new. In the same way, an organization can unleash great power when it fuses together its organization's two nuclei: its culture and its brand (p. xiii)

According to Yohn (2018), "to build a great organization, one must have that same clarity about the organization's brand aspiration and how to align the organizational culture" (p. 29) Yohn also noted that "culture must be as distinct as the brand and brand and culture should be cultivated together" (p. xxi). This concept is the foundation of the study, because the literature suggests that in order to build a sustainable marketing model in a higher education institution in the future, bringing clarity around an institution's

brand and culture will provide the distinction needed to create a strong model that can be leveraged to build enrollment, partner with donors, hire top staff and faculty, connect internally as an organization, and continue to grow the institution.

Operationalizing brand and culture strategy is also imperative for brand and culture fusion. Yohn (2018) shared that to "tap the full value and growth creating potential of your desired culture - one that is fully aligned with your brand - you must operationalize it through strategy, management, communication, and operations systems" (p. 78). If these areas are not aligned, and design and operations are not supporting and progressing the organization's preferred culture and brand, they are detracting from it, causing mixed messaging and diluting any efforts.

Yohn (2018) shared that when culture and brand are completely in sync, their alignment is manifested visibly in four primary areas:

1. Purpose and values integration
2. Employee experience-customer experience integration
3. Internal brand alignment
4. Employee brand engagement

Furthermore, because internal brand alignment is achieved when people are aligned with each other on brand matters, for a culture to be fully aligned with the brand, everyone in the organization must share one common understanding of the company's brand identity. There are two ways in which this alignment manifests in a company's culture:

1. The company's brand identity and positions have been clearly articulated to everyone inside the organization.

2. The key stakeholders in the organization consistently agree about what is considered on brand and what is not (Yohn, 2018).

Yohn's theory around brand and culture fusion is built upon a strong foundation from earlier works on the importance of both brand and culture within an organization.

Earliest works of brand and culture. As early as 1954, Peter Drucker, widely considered as the leader in modern-day management, argued that marketing could not exist separately from management functions but instead must be built within the whole business to be seen from a customer's point of view (Drucker, 1954). Deshpande and Webster (1989) elaborated on this, stating "in other words, the marketing concept defines a distinct organizational culture, a fundamental shared set of beliefs and values that put the customer in the center of the firm's thinking about strategy and operations" (p. 3). Although Drucker referenced marketing and culture, while not explicitly stated, this concept of integrating marketing and culture was one of the first ideas to surface where the importance of alignment between branding and culture was underscored. In the 1960s, Kotler shared, "effective marketing requires a consumer orientation instead of a product orientation and marketing has taken a new lease on life and tied economic activity to a higher social purpose" (Kotler & Levy, 1969, p. 15). Even over 50 years ago, Kotler connected that marketing must have a higher purpose which connects to the significance of marketing, branding, and culture.

After Drucker's early writing on this topic, it was not until 1985 that the discussion around brand and culture was first explicitly applied to higher education. Discenza, Ferguson, and Wisner (1985) shared that higher education institution attendance and choosing the right college received a lot of attention, which led

researchers to apply marketing theory to attract students. Furthermore, it was suggested that marketing theory would persist at higher education institutions, especially at the turn of the century. Tierney (1988) addressed the rationale regarding why organizational "culture is a useful concept for understanding management and performance in higher education" (p. 3). Tierney (1988) also shared that the lack of understanding regarding the significance of organizational culture is an opportunity for management development because institutional operations often hinder honest evaluation of the problems within higher education. These authors provide support for the importance of intentional work around brand and culture and each of these ideas underscore the significance of investing in employees while focusing on branding and marketing to successfully grow an institution.

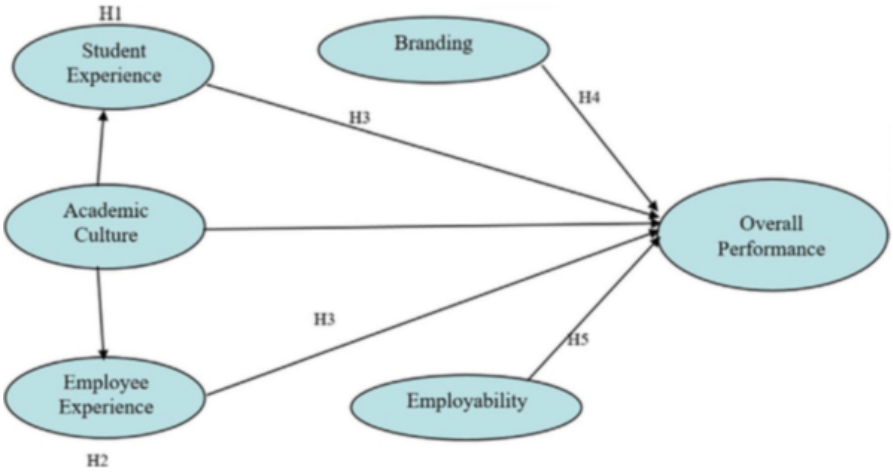
Brand and culture in higher education. In 2005, Toma et al. shared that higher education institutions are better positioned for brand equity and healthy institutional culture when there is a strong connection of the two areas. Connecting these two concepts requires the understanding that supporting brand and culture alignment at higher education institutions "will only be effective when the ethos of the brand is deeply rooted in the everyday leadership and people management process of the organization" (Mosley, 2007, p. 132). This ethos should be connected in order for true alignment to occur successfully. Sataøen (2015) shared that within the higher education brand, essential components should include areas of vision, values, and culture.

Furthermore, Vieira-dos Santos and Gonçalves (2018) conducted a study of 635 employees that demonstrated how an organization's culture is a core component that must align with both internal marketing and external marketing. Vieira-dos Santos and

Gonçalves' study concluded that culture contributes to the understanding and analysis of educational organizations, like how an institution gets structured, how it is developed, and how well it performs. The study also identified potential ways for institutions to improve their management, build engagement, and update strategies to improve culture, as well as how the use of those concepts could help marketing departments tap into what employees value. Vieira-dos Santos and Gonçalves' concepts demonstrate how organizational culture and internal marketing contributes to employees' perceived organizational support.

In Figure 7, Pandita and Kiran (2021) illustrate how branding positively influences the performance of an institution and how variables like branding and culture make an impact on the overall performance of the institution.

Figure 7: Employee Experience Through Academic Culture



Note. Reprinted "Employee Experience Through Academic Culture Emerges as a Strongest Predictor of Overall Performance of Higher Education Institutes, by A. Pandita, & R. Kiran, 2021, *Journal of Public Affairs*, e2672. Copyright 2021 by the authors.

Each of these distinctions plays a huge role in how higher education institutions and marketing directors lead brand and culture alignment at their institution. Simões

(2019) shared, a "specificity and variety of constituents (in particular students, researchers, faculty, staff, alumni, parents, employers) with multiple interests in the institution calls for a comprehensive idea of what the university stands for and its brand" (p. 46). Marketing and brand strategy should be institution-wide strategies and it is the marketing leader's job to ensure institutional leaders understand the importance to these strategies to institutional goals (Flannery, 2021).

Leading marketing in higher education in the area of brand and culture alignment. Leading marketing in higher education in the area of brand and culture alignment requires a full comprehensive and authentic approach that truly embodies the institution. Stukalina (2021) shared that there are many changes happening in the higher education landscape, and marketing and branding are becoming a central component of higher education institutions. Furthermore, Flannery (2021) expressed how marketing leaders should go about stewarding the institutions brand and culture by partnering with the president and key leaders of the institution:

> Under pressure from their boards to elevate the profile of their institutions, presidents want to ensure that the stories of their colleges and universities are told in a manner that effectively promotes perceptions of excellence, quality, and value. They expect the mission, vision, and values of their institutions, and often key aspects of their strategic plans, to be expressed through inspirational and consistent messaging in all marketing to many constituencies. (Flannery, 2021, p. 4)

In his dissertation titled , *Branding in Higher Education: How Meaning-Making Efforts Lead to Successful Branding Outcomes that Positively Influence Reputation and a*

Strong Institutional Culture, Steen (2020) shared that brand and culture have a powerful impact on higher education institutions. “Culture and institutional identity are not only inseparable from the brand; they *are* the brand” (p. 157). Leading marketing in higher education in the area of brand and culture alignment is established as vital across the literature, yet there is no information in the literature that demonstrates how marketing directors at private non-profit higher education institutions lead brand and culture alignment, nor does the literature address the challenges and best practices experienced. Additionally, Sujchaphong, Nguyen, and Melewar (2015) contended that there is a strong necessity for institutions to align “employee behavior with brand values” (p. 24). This alignment would be led by marketing directors and the work of their team, creating further urgency for additional research. To further explore and understand the work around the challenges and best practices of marketing directors at private non-profit higher education institutions, AT will be used as a framework to unpack this multifaceted topic.

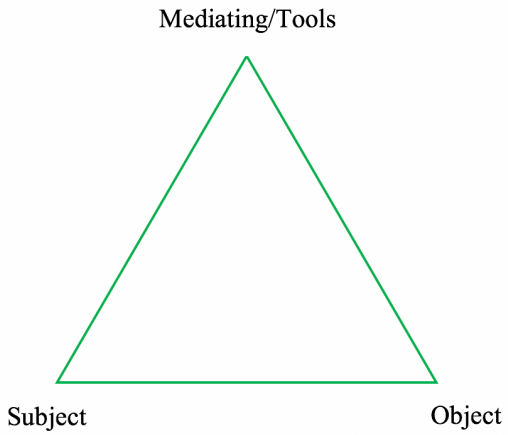
Activity Theory: A Theoretical Framework

AT is a theoretical framework that was created to help clarify multifaceted systems that involve multiple stakeholders. This study is rooted in AT because of its organized methods to unpack the multifaceted complexities of brand and culture alignment and identify the challenges and best practices of marketing directors and how they lead brand and culture alignment at their private non-profit higher education institutions. Private non-profit higher education institutions are complex organizations with many stakeholders and departments that affect the brand and culture of the private non-profit higher education institutions on a daily basis, which affects private non-profit

higher education institutions both internally and externally. AT provides a clear approach to organizing and evaluating the challenges and best practices that marketing directors experience when leading brand and culture alignment.

Historical overview. Developed by German philosopher Lev Vygotsky and his student Russian psychologist Alexei Leontyev in the 1920s, AT is a theoretical model that provides clarity and description around a theory to offer an understanding of the activity that is being studied. Engeström (2001) explained that Vygotsky was focused on the connection of human (*subject*) activity having purpose (*object*) that is carried out by actions through the use of tools to achieve that purpose (*outcome*), which can be both physical or psychological. The center of this relationship focuses on the subject and the object. Simply described, AT defines "who is doing what, why, and how" (Hasan & Kazlauskas, 2014, p. 9). To provide better clarity around Vygotsky's theory, Leontyev created a first-generation model, which is understood as the mediational triangle (see Figure 8).

Figure 8: Vygotsky's First-Generation Mediational Triangle



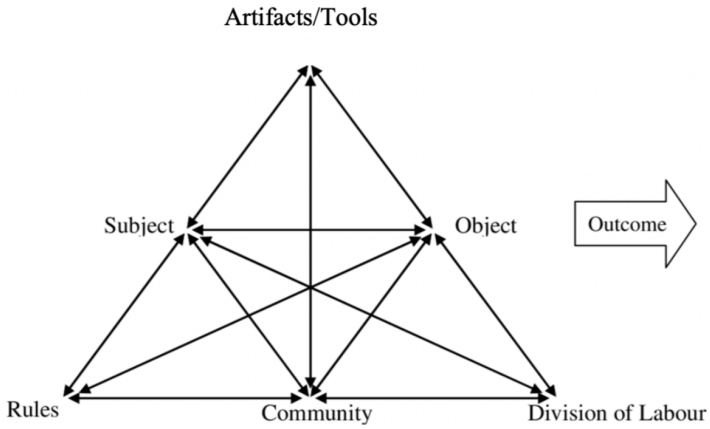
Note. Adapted from "Expansive Learning at Work: Toward an Activity Theoretical Reconceptualization," by Y. Engeström, 2001, *Journal of Education and Work, 14*(1), 133–156. Copyright 2001 by the author.

Researcher Yrjö Engeström built on this mediational triangle in 1987, developing a second generation AT model that brings more complexities from the first generation AT triangle. Engeström (1987) believed activity can be more than one element and should represent the complexities of the world. Subsequently, his model provides more depth into AT. This *collective system* that Engeström shared built on the first two elements of subject and object and also looked at the systems outcomes using four additional elements: *tools, rules, division of labor* and *community* (Hasan & Kazlauskas, 2014, p. 11). Engeström's AT system can be applied to real world circumstances like places of work, community organizations, and places like schools and institutions. Hasan and Kazlauskas (2014) shared that the main focus of AT centers on three steps:

- Step 1: Identify the main activities of the system that is going to be explored together with each activity's *subject(s)*, *object* and *purpose*.
- Step 2: Identify the *actions* and *tools* of the *activity* or *activities*, and indicate the levels of *tools* beginning with most important.
- Step 3: Identify significant "dynamics and tensions" that occur between the activities identified.

It was Engeström's (1987) contention that following each step will create a well-rounded and thorough instrument that provides robust descriptions of the activity that can be used for both the researcher and the group being researched. Figure 9 illustrates Engeström's updated model.

Figure 9: Engeström's Expended Activity Theory Model



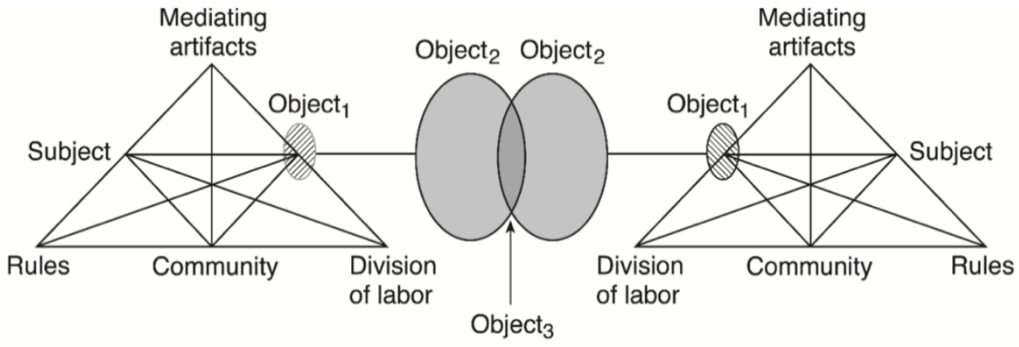
Note.. Reprinted from "Work as a Testbench of Activity Theory," by Y. Engeström, 1993, in S. Chaiklin and J. Lave (Eds.), *Understanding Practice: Perspectives on Activity and* Context (pp. 65–103). Cambridge, YK: Cambridge University Press. Copyright 1993 by the author.

It is important to understand the four key factors that drive AT. These factors are: *tools, rules, community and division of labor*. The heart of AT focuses on the connection of the *subject* and the *outcome* of the activity being studied. The four factors can either help or hinder the subject's ability to achieve their goal which creates the activity. *Tools* or *instruments*, which can also be artifacts, can be anything internally or externally the subject uses in the activity. *Tools* can include books, marketing materials, technology, or procedures. *Rules* connect the subject to the community through areas cultural norms, the missions, vision and values of an organization and guidelines the organization follows. *Community* is the group with which the subject interacts to carry out the activity. For example, in a private non-profit higher education institutions, community can include faculty, staff, current students or alumni. Lastly, the fourth factor is *division of labor*. Engeström (2015) shared that with the division of labor is a group of individuals with hierarchy who are accountable to lead various tasks within the activity. For example, at

private non-profit higher education institutions, the division of labor could include the administration, the admissions or marketing office, or the president of the private non-profit higher education institution. The second-generation AT model provides a comprehensive look, going deeper into the activity of the subject and how the tensions of the activity generate the outcome.

The third generation of the AT model built on the last two generations that were shared previously (Figures 8 & 9). The third generation AT model builds on similar elements as Engeström's model from 1987, but the new model is even more complex and demonstrates how various activity systems can mutually interact to demonstrate collaboration between systems (Yamazumi, 2006). Yamazumi's (2006) theory was further supported by Engeström and Glăveanu (2012), who identified the need to expand to the third model to provide an augmented focus to subjects and new introductions to viewing how to analyze the complexities of the process of AT.

Figure 10: Engeström's Third Generation Activity Theory Model Depicts Two Interaction Activity Systems



Note. Reprinted from "Expansive Learning at Work: Toward an Activity Theoretical Reconceptualization," by Y. Engeström, 2001, *Journal of Education and Work, 14*(1), 133–156. Copyright 2001 by the author.

AT is a framework that was created to help clarify multifaceted systems that involve multiple stakeholders. Analyzing AT results can help clarify and support efforts

in multifaceted activity systems like private non-profit higher education institutions. Yamazumi (2006) described this shift that is occurring with organizations and education, and how this movement requires new standards in education.

Criticism of AT. Engeström (2009) discussed arguments and weakness regarding AT in his book chapter "The Future of Activity Theory: A Rough Draft" and used that feedback and criticism to drive the constant evolution of AT. Engeström shared that one critic argued that media determines the "nature and possibilities of human activity, making the object of the activity secondary" (p. 310). Engeström respectfully disagreed with the critic, stating, "focusing on contradictory objects in specific activities calls for new forms of agency" (p. 311). Engeström's continued progression of AT matches the progression of human activity, ensuring that it stays applicable in various forms of research.

Application of AT in educational research. Engeström (1993) argued that AT is one of the "best kept secrets of academia" (p. 64) because it can be applied to education, learning, and systems. Yamazumi (2006) provided insight into educational research, applying the new paradigm to educational research, paving the way for private non-profit higher education institutions to identify challenges and best practices. Furthermore, Kuutti (1996) shared that for an individual to develop a stronger skillset regarding a specific task or activity, operations must be put into place so that the skillset can then broaden, after which the individual becomes more fluent with the activity.

Application of AT in creativity, branding, and marketing. There is limited research that applies AT in the realm of marketing, branding, and communications. However, Kaptelinin and Nardi (2006) focused on the concept of AT within the study of

phenomenology and creativity that may connect with branding and marketing. Kaptelinin and Nardi provided examples of Walt Disney and computer gaming activities that required a level of creativity for the activity to move forward. In their research, they argued that AT "looks for the creative possibilities of breakdowns, conflicts and contradictions" (p. 220). The researchers further contended that the artifacts that came out of the AT process highlighted creativity, thus demonstrating that creativity and artifacts identify activity that is focused on the future.

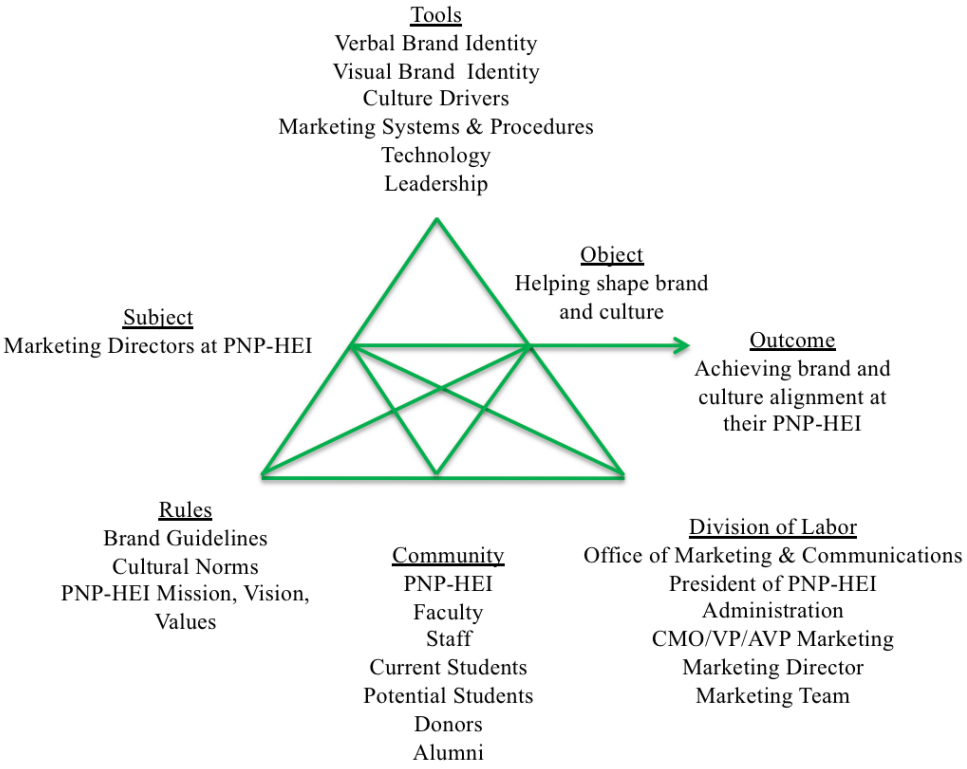
AT in branding. The review of the literature revealed a gap in the research in the application of AT to branding in higher education. In their AT research, *Employer Branding: Moulding Desired Perceptions in Current and Potential Employees*, Oladipo, Iyambo, and Otubanjo (2013) shared that employer branding has not received a lot of attention in the branding literature. They expressed how it was taken for granted that strong brands require effective employees who help implement the brand's vision. Although this is one small piece of the landscape of branding in higher education, it is the only relevant literature that could be found.

AT in marketing. The review of the literature revealed a gap in the research in the application of AT to marketing in higher education. Another study that connected AT with marketing was conducted by Nuseir and AlShawabkeh (2018). Their research was titled "Marketing Communication in the Digital Age: Exploring the Cultural Historical Activity Theory in Examining Facebook's Advertising Platform." Nuseir and AlShawabkeh focused their AT work on marketing and communications regarding social media. Although this is one small piece of the landscape of marketing in higher education, it is the only relevant literature that could be found.

AT as a framework to understanding how marketing directors lead brand and culture alignment. "Human activity is endlessly multifaceted, mobile, and rich in variations of content and form. It is perfectly understandable and probably necessary that the theory of activity should reflect that richness and mobility" (Brown, Heath, & Pea, 1999, p. 20). There is a richness and mobility around the work that marketing directors lead on a daily basis. Figure 11 provides a hypothetical example of how a marketing director could lead and shape brand and culture alignment at their private non-profit higher education institutions through their daily work.

AT provides a holistic framework to investigate marketing directors' activities in their efforts to achieve brand and culture alignment at their private non-profit higher education institutions. The goal of this study was to expand on AT in educational research with a focus on higher education and provide useful and supportive information to marketing directors at private non-profit higher education institutions to better understand the challenges and best practices experienced by other marketing directors as they worked to lead brand and culture alignment, so private non-profit higher education institutions can understand the best path forward to stay competitive and attract the internal and external constituents they desire to stay progressive. It is anticipated that this AT research may provide a deeper understanding of the challenges and best practices that marketing directors encounter trying to achieve this multifaceted work.

Figure 11: A Hypothetical Branding and Culture Activity



Note. This activity identifies potential challenges and best practice systems that interact to either support or hinder the desired outcome, achieving brand and culture alignment.

Summary

Brand and culture alignment are two essential and connected components to the work that marketing directors lead at their private non-profit higher education institutions, because it is the marketing director and marketing department's goal to effectively market that institution's brand. Higher education has great pressure to stay competitive and the use of strategic and organizational brand management decisions can be extremely valuable (R. L. Williams & Omar, 2014). Furthermore, a brand targets all audiences, and impacts activities at that organization; it infuses everything the company is currently, articulating who they are and what they do (Hatch & Schultz, 2008).

Moreover, a strong brand is one that has the ability to align its cultural values with the cultural values of their customers to build and support effective relationships with customers (Alexandra, Petruta, & Gheorghe, 2014). The link between organizational culture and branding is not fully understood in the brand literature, nor in the higher education market. In fact, some have viewed applying concepts of marketing to education as challenging and controversial and an inappropriate approach (Simões 2019). Furthermore, Simões (2019) shared that this controversial notion stems from institutions considering branding and marketing as an unsuitable approach because some believe students should not be viewed as consumers and higher education should not be viewed as a product or service.

The literature has established that constant changes are inevitable in higher education and this dynamic requires the need for continued growth and transformation in branding and culture at private non-profit higher education institutions. The literature also confirms that these changes will influence how private non-profit higher education institutions attract various audiences and create sustainability for the future and necessitate the further exploration the challenges and best practices that marketing directors encounter when leading brand and culture alignment at their private non-profit higher education institutions.

This chapter reviewed scholarly literature related to the topics outlined in this phenomenological study. The topics aimed to build contextual understanding around higher education, types of higher education institutions, disruption in higher education, generational expectations, competition, the importance of marketing, the role of marketing directors, the importance of branding, culture, brand and culture fusion and

alignment, and the unique challenges faced by marketing directors as they work to lead brand and culture alignment in higher education. The chapter further presented the theoretical framework that underpins this study, AT. The review was inclusive; however, the literature indicates the need for more practical research on understanding how marketing directors lead brand and culture alignment at private non-profit higher education institutions.

CHAPTER III: METHODOLOGY

Overview

This study focused on exploring the lived experiences of marketing directors and identifying the challenges and best practices experienced while leading brand and culture alignment in private non-profit higher education institutions. Chapter I of this dissertation provided a brief overview of the organization of the study, background on the core topics in this study and a statement of the research problem. Lastly, it presented the purpose statement and research questions and closed with the significance of the study.

Chapter II of this study focused on a review of literature. The review of literature outlined each variable associated with this study. It explored the history of higher education in the United States and presented background on marketing, branding and culture in higher education. Finally, it examined the literature associated with marketing directors in higher education and the roles and responsibilities leading brand and culture alignment as well at the theoretical framework, AT.

Chapter III presents the research methodology used for this study. The purpose statement and research questions for this study are presented, as well as an exploration of research design, population, and sample populations. Additionally, there is focus on the instrumentation, steps taken to control researcher bias, increase validity and reliability, and data collection and analysis procedures for this study. The chapter ends with a discussion on the study's limitations.

Purpose Statement

The purpose of this phenomenological study was to identify and describe, through the lens of AT, the challenges and best practices of marketing directors at private, non-profit higher education institutions on how they lead brand and culture alignment.

Research Questions

Two research questions formed the basis for this study.

1. Through the lens of AT, what are the challenges marketing directors at private, non-profit higher education institutions experience as they lead brand and culture alignment?
2. Through the lens of AT, what are the best practices marketing directors at private, non-profit higher education institutions recommend to lead brand and culture alignment?

Research Design

This study sought to identify and describe the lived experiences of marketing directors at private, non-profit higher education institutions to understand the phenomena associated with how they lead brand and culture alignment with a focus on the identification of challenges faced and best practices.

Qualitative research design. Qualitative research is a descriptive design that conveys data through stories and descriptions of the experience that is being examined (Patton, 2015). Qualitative research offers the researcher an opportunity to dig deep into the experiences of the participants. This is supported by McMillan and Schumacher (2010) who explained that the purpose of qualitative research is to identify and describe lived experiences and gather data on a naturally occurring phenomena. Additionally,

McMillan and Schumacher shared that to acquire those lived experiences, most qualitative data is conducted through interviews, observations, and artifacts, as well as in the "form of words rather than numbers so the researcher searches and explores until a deeper understanding is achieved" (p. 23). This study investigated the challenges and best practices of marketing directors in an attempt to deeply understand their lived experiences related to brand and culture alignment. It was important to collect stories about the lived experiences of marketing directors in private non-profit higher education institutions through a qualitative approach, since qualitative research allows for open-ended interviews and responses. Because the principal focus of this study was on the lived experiences of marketing directors, when determining which approach was most fitting, it was determined that a qualitative approach was best suited to meet the needs of this study. For example, to understand the core of their lived experiences, semi-structured interview questions allow participants to authentically describe their personal experiences and therefore was determined to be the most appropriate research methodology.

Phenomenological research. Within qualitative research, there are many methods. ethnography, heuristics, and phenomenology all appeared to be potential methodologies for this study. After investigating the appropriateness of these three methods, phenomenology emerged as the most appropriate method for this study, as this methodology looks at the lived experiences of a group of people and the consciousness of human experience (McMillan & Schumacher 2010). Patton (2014) explained that phenomenological studies focus on asking what the meaning, configuration, and core of the lived experience of a phenomenon is for a person or group of people. Researchers utilize a phenomenological methodology to dig deeper into the data and investigate the

lived phenomenon of a specific group of people, which in the case of this study, is the lived experiences of marketing directors and the best practices they use and challenges they face as they lead brand and culture alignment at their private non-profit higher education institutions.

Creswell (2013) explained that phenomenological research comes from both psychology and philosophy that looks at a group of individuals who are experiencing the same phenomenon. Moreover, this research usually involves interviews to explore the phenomenon more closely. Consistent with phenomenological studies, this qualitative framework focused on obtaining stories about the lived experiences of marketing directors at private non-profit higher education institutions to understand those experiences using semi-structured interview questions to allow participants to describe the best practices they deployed and the challenges they faced. To answer the research questions, two types of data were collected. First, the researcher interviewed 15 participants using a semi-structured interview protocol (see Appendix H). Second, artifacts were collected and used to triangulate data. The data collection and analysis sections of this chapter provide more details about the data collection procedures.

Population

According to McMillan and Schumacher (2010)**,** the population of a study "is a group of elements or cases, whether individuals or objects, or events, that conform to a specific criterion where a researcher intends to generalize the results of research" (p. 129). Moody (2021) indicated that there were 3,982 higher education institutions in the United States in the 2019-2020 school year. Of those 3,982 institutions, a total of 1,660 were private non-profit higher education institutions. Typically, an institution has one

marketing director responsible for branding. Given this, the population of this study was 1,660 marketing directors.

Target Population

The target population for this study was marketing directors at California private non-profit higher education institutions. Creswell (2013) explained that the target population is a reduced subgroup of the main population that represents the same qualities as the larger population. Out of the 1,660, private, non-profit higher education institutions in the United States, there are 150 private, non-profit higher education institutions in California according to the Public Policy Institute of California (n.d.). If each of those institutions has at least one marketing director, it is estimated there are 150 marketing directors in California.

Sample

McMillan and Schumacher (2010) defined a sample as a group of individuals from whom the data is collected. Sample size in qualitative studies tend to be smaller than studies in quantitative inquiry and research experts lack wide scale agreement on the appropriate size. Creswell (1998) suggested 25 participants as an appropriate sample size, whereas Morse (1994) advised a sample size as few as five participants and no greater than 25 participants in order to identify concepts or theories depending on the type of phenomenon and the multiple iterations of interviews. Sample sizes should be selected with the aim of generating rich data. Based on the target population and sampling criteria (described subsequently), along with combined recommendations from the phenomenological research experts, the sample size for this study was 15 marketing directors at private non-profit higher education institutions in California. Figure 12

illustrates a summary of the breakdown of population, target population, and sample population for this study. To complete a well-rounded and thorough phenomenological study, criterion sampling was used to identify 15 research participants.

Figure 12: Population, Target Population, and Sample Population for This Study

Criterion sampling. Criterion sampling entails choosing participants for a study using a predetermined criterion of significance (Patton, 2001). For this study, participants were specifically chosen using a predetermined criterion of being a marketing director at a private non-profit higher education institutions. To ensure the research participants had ample expertise and to further narrow the target population for this study, the following criteria was applied to the target population. To qualify for the study, participants must have met three out of the six criteria:

1. Must hold a title of marketing director;
2. Must have held the title of marketing director at a private non-profit higher education institution within the last 3 years.
3. Must have worked in higher education for at least 1 year;
4. Must have served as a marketing director at their current private non-profit higher education institution in California for at least 1 year.
5. Must be involved in a professional association like the AMA or PRSA.

6. Must be the primary person responsible for branding at their private non-profit higher education institution.

Sampling procedures. The researcher chose the following procedures to narrow down to 15 marketing directors.

1. An application was submitted to the UMass Global University Institutional Review Board (IRB) for review and approval. After IRB approval was received, the researcher conducted a thorough audit on the AICCU website to search for 30 private non-profit higher education institutions.
2. The researcher then used the private non-profit higher education institution's website to acquire the email addresses of the marketing director(s) at the private non-profit higher education institution. When email addresses were not readily available on the website, the researcher made phone calls to the private non-profit higher education institutions to obtain the email addresses.
3. An email was then sent to the marketing director(s) at each private non-profit higher education institution, inviting them to participate in the study. This invitation (Appendix C) included an overview of the study, the selection criteria, the Participant Bill of Rights (Appendix B), the Informed Consent Form (Appendix D), and contact information for the researcher in case potential participants had questions about the study.
4. Each potential participant was asked to verify that they met three of the six sampling criteria and to respond to the researcher to confirm their commitment to participating in the study. A secondary check to ensure that

potential participants met three out of the six sampling criteria was built into data collection interviews.

5. Once a participant confirmed the meeting, a meeting invite was sent via Gmail. The invitation included a link to the Zoom meeting as well as the Participant's Bill of Rights (Appendix B) and the Informed Consent Authorization Form (Appendix D). The participant was asked to digitally sign and return the informed consent prior to the scheduled interview and were provided with a list of potential artifacts to submit as part of the data collection process.
6. Once 15 marketing directors responded that met the sampling criteria and confirmed the interview, the participant list was closed, and the researcher moved forward and scheduled individual Zoom interviews using a Google document with 15 participants.

Instrumentation

For the purpose of this study, the researcher was considered the primary instrument to gather data for this study. It was imperative that the researcher exhibit the aptitude to represent the data for the study in an unbiased and precise manner. Patton (2014) explained that qualitative findings focus on two kinds of data: interviews that are open-ended, and artifacts. For the purposes of this study, it was determined that semi-structured interviews and artifacts would be the best way to gather data for this study.

Researcher as the Instrument

McMillan and Schumacher (2010) shared that the researcher's role when collecting data is to be as detached as possible to avoid any bias toward the study. Every

effort was made by the researcher to ensure bias was controlled, given that the researcher created the interview questions, interviewed participants, assessed all artifacts, coded the data, and identified themes in the research. The researcher of this study was a marketing director with over 16 years of experience in marketing in higher education, and specifically with private non-profit higher education institutions. The researcher's experience in higher education marketing could lead to researcher bias. This is noted as a limitation of this study.

McMillan and Schumacher (2010) shared that it is important for researchers to separate themselves from the study to elude bias and understand bias can happen especially when the researcher is passionate about their subject. Safeguarding the study was an essential priority to the researcher. This was imperative to limit possible bias and ensure alignment of the study. A sequence of semi-structured interview questions were created and aligned with the study's research questions. Among other quality assurance steps outlined in later sections of this chapter, a content expert was utilized to review the interview protocol (Appendix H) for the research.

Interview design. For this study, the instrument to collect the data was an interview protocol (Appendix H) that consisted of semi-structured interview questions so each respondent would respond to the same prompts during each interview. The semi-structured interview questions were strategically designed to align with each research question and were separated out to align with each part of the theoretical framework, AT. AT is a theoretical framework that was created to help clarify multifaceted systems when multiple stakeholders are involved. Developed by German philosopher Lev Vygotsky and his student, Russian psychologist Alexei Leontyev, in the 1920s, and then expanded on

by researcher Yrjö Engeström, AT is a theoretical model that provides clarity and description around a theory to provide an understanding of the activity that is being studied. AT provides a well-defined approach to organizing and evaluating the challenges and best practices that marketing directors experience when leading brand and culture alignment. The semi-structured interview questions were carefully constructed and rooted in literature and AT. *Table 3* below addresses the foundation for the AT interview questions:

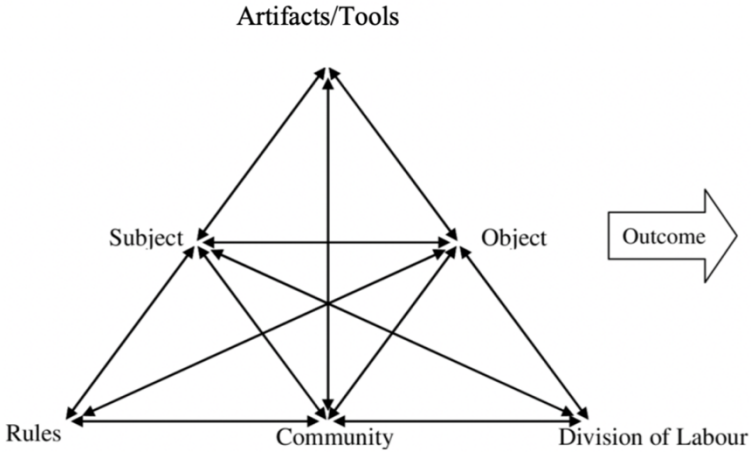
Table 3: Interview Questions Alignment Table

AT Interview Process	Interview Questions
Rules • Rules that were challenging leading brand and culture alignment • Rules that were best practices leading brand and culture alignment	Questions 1-2
Community • Community Groups that were challenging leading brand and culture alignment • Community Groups that were best practices leading brand and culture alignment	Questions 3-4
Division of Labor • Division of Labor Departments that were challenging leading brand and culture alignment • Division of Labor Departments that were best practices leading brand and culture alignment	Questions 4-5
Tools • Tools that were challenging leading brand and culture alignment • Tools that were best practices leading brand and culture alignment	Questions 6-7

The researcher created the interview questions to align with the AT methods of: *rules, community, division of labor*, and *tools.* The respondent was also provided definitions of each method prior to being asked the interview question. Specifically, the research participants were asked which of the AT methods (*rules community, division of*

labor, and *tools*) may have influenced the challenges and best practices they experienced as they lead brand and culture alignment. Simply described, AT defines "who (subject) is doing what (object), why (outcome), and how (methods)" (Hasan & Kazlauskas, 2014, p. 9). An example of Engeström's AT model is depicted in Figure 13:

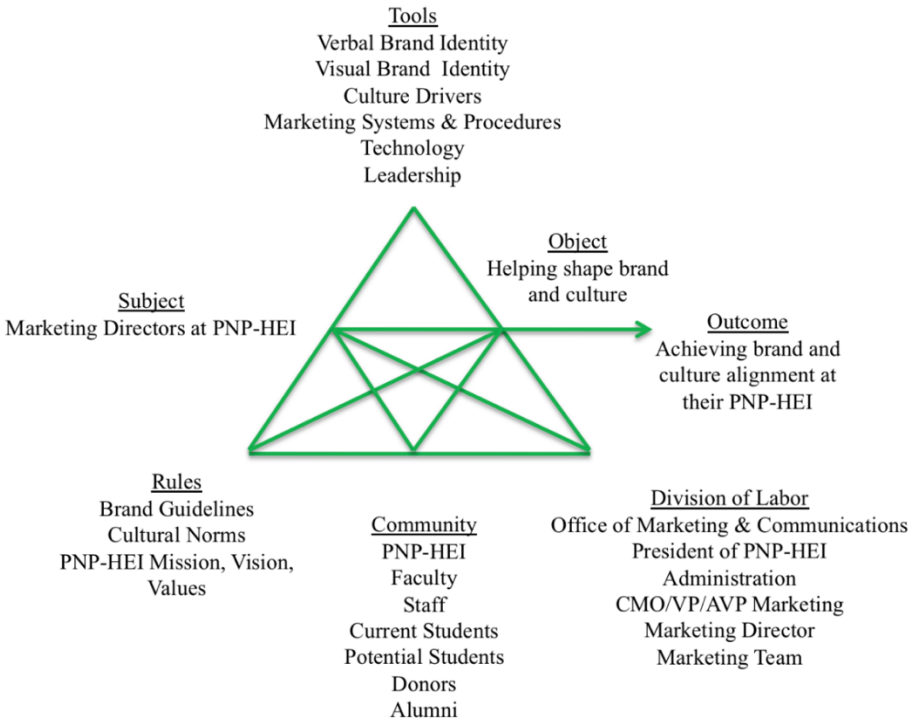
Figure 13: Engeström's Expended Activity Theory Model.



Reprinted from "Work as a Testbench of Activity Theory," by Y. Engeström, 1993, in S. Chaiklin and J. Lave (Eds.), *Understanding Practice: Perspectives on Activity and* Context (p. 65–103). Cambridge, YK: Cambridge University Press. Copyright 1993 by the author.

Utilizing Engeström's AT model, a hypothetical model of marketing directors at their private non-profit higher education institutions (*subjects*), helping shape brand and culture (*objects*) and how they achieve brand and culture alignment (*outcomes*). Figure 14 is provided to better explain the framework applied in the interview design:

Figure 14: A Hypothetical Marketing Activity



Note. This activity illustrates how the researcher plans to apply Activity Theory during the research process of marketing directors leading brand and culture alignment at their private non-profit higher education institutions.

Finally, the researcher employed probing questions as needed to investigate information at a deeper or if the researcher wanted to explore additional information that was unexpected or relevant to the study.

Validity

Validity is achieved when the degree of what is being measured precisely reflects what was designed to be measured (Patten, 2014). Validity also means that there is a connection between the phenomenon that is being investigated and what makes that phenomenon valid in how it is being tested. Understanding the importance of valid research was imperative to the credibility and veracity of the study. Three strategies were developed to ensure the validity of the study.

Content validity. Content validity indicates "an assessment of measure based on the appropriateness of its content and addresses whether or not other measurements used actually produce responses that address the construct in question" (Patten, 2014, p. 126). To ensure content validity, it was essential to have a content expert in marketing analyze the interview protocol (Appendix H) to discern and confirm that the questions would reflect the measurement that was desired for the research study. Preceding any data collection, interview questions were devised purposefully to align with the research questions. After the researcher created the interview questions, they were sent to the content expert to validate the relevance of the questions. A content expert is a resident professional in the field who is well-versed in the content being studied and is someone who can make accurate rulings on the truthfulness of the content of the study (Patten, 2014). Content experts are significant because if a question seems to contrast with a research question, the content expert can indicate that to the researcher to ensure there is consistent validity in each question. The content expert for this study was a current marketing director at a higher education institution who has worked in both public and private non-profit higher education institutions. The expert holds a hold a master's degree and has over 10 years of higher education marketing experience. To qualify as a content expert, the content expert met three out of the six criteria:

1. Must hold a title of marketing director;
2. Must have held the title of marketing director at a private non-profit higher education institution within the last 3 years.
3. Must have worked in higher education for at least 1 year;

4. Must have served as a marketing director at their current private non-profit higher education institution in California for at least 1 year.
5. Must be involved in a professional association like the AMA or PRSA.
6. Must be the primary person responsible for branding at their private non-profit higher education institution.

This content expert shared helpful feedback to confirm validity and expressed no trepidations concerning the alignment of the interview questions with the research questions.

Pilot interview. Once the content expert helped the researcher review the research questions, the researcher collaborated with a qualitative research expert to carry out a pilot interview and rehearse and refine her qualitative research skills (Appendix E). A research expert was imperative to help the researcher achieve a quality study. The research expert met four out of five of the following criteria to partake in the pilot interview. The research expert was not included as a participant in the study:

1. Has a doctorate degree
2. Has experience utilizing in qualitative research
3. Has conducted a minimum of 15 qualitative interviews
4. Has experience in the field of higher education
5. Available to participate using online platforms like Zoom or Google Meet

The purpose of the pilot interview was to field test the final interview protocol (Appendix H) and substantiate the researchers qualitative research, and interview proficiencies. Once the pilot interview was conducted, the expert was asked to provide feedback using the Pilot Interview Participant Feedback Questions (Appendix E). The

expert was also given a transcript of their interview to review and provide feedback on the transcription. During the pilot interview, efforts were made to safeguard the setting and participants and interview protocols were as similar to the main study as possible. The research expert, who was also proficient in the theoretical framework AT, watched the pilot interview via Zoom and provided helpful feedback on interview skills like tone of voice, pacing the questions for the participants, and follow-up questions (Appendix H). For example, the research expert suggested to use a notepad during the interviews to take notes, and also recommended that the researcher be genuine and relatable in the interviews. Additionally, the researcher expert suggested providing a broad overview of AT to the participants to help them understand how the interview questions fit within the AT framework. The researcher employed each of these suggestions for the interviews. The pilot interview was a positive experience that helped the researcher gain confidence and better experience in conducting interviews, as well as assisting in refining the process for the interview protocol. The feedback of the research expert was utilized, and the researcher was able to move forward with the data collection process.

Reliability

The reliability of a study is determined based on the consistency of the results (Patten, 2014). Various procedures can be implemented to support consistency in a qualitative study. This study used several reliability design measurements: internal and external reliability as well as intercoder reliability.

Internal reliability. Internal reliability is the most common manner of reliability and is the regularity of elements within an instrument (McMillan & Schumacher, 2010). It is commonly known that in qualitative research, triangulation of the data is a way to

ensure internal reliability. McMillan and Schumacher (2010) defined triangulation as obtaining convergent data using cross-validation. This strategy provides a more comprehensive set of data. As such, the researcher triangulated interview responses with artifact data, with the end goal of increasing the internal reliability of the data.

External reliability. External reliability is not a factor in qualitative research because the data will not be replicable in future settings. Creswell and Creswell (2018) shared that "generalization is a term used in a limited way in qualitative research, since the intent of this form of inquiry is not to generalize findings to individuals, sites or places" (p. 202). Generalizing was not essential for this study because the true goal was to better understand the phenomenon of the lived experiences of marketing directors as they lead brand and culture alignment at their private non-profit higher education institutions.

Intercoder reliability. Another way to ensure reliability of a study is to collaborate with a qualified research expert during the coding process to ensure intercoder reliability. Lombard, Snyder-Duch, and Bracken (2002) defined intercoder reliability as a "widely used term for the extent to which independent coders evaluate a characteristic of a message or artifact and reach the same conclusion" (p. 2). To ensure the strongest results possible for this study, the research expert selected to code a section of the data was a professional with experience in both AT and qualitative research. This was done to ensure the research expert had ample experience to make applicable judgments on the content (Patten, 2014). This expert reviewed 10% of the transcripts to ensure intercoder reliability with the aim of achieving 80% consistency in coding, which

is consistent with Lombard, Snyder-Duch, and Bracken's conclusion (2010) that at least 80% is considered to provide acceptable reliability.

Data Collection

In an effort to generate an accurate view of the lived experiences of marketing directors in private non-profit higher education institutions as they lead brand and culture alignment, data was acquired through semi-structured interviews and artifacts using AT. Prior to soliciting marketing directors to participate in the study, the researcher completed the Human Subjects Research: Social-Behavioral-Education Research Course by CITI Program to learn about the ethical treatment of research participants (Appendix A). An application was submitted to the IRB for review and approval. Once IRB approval was received and the sample was identified, as outlined in the sampling procedures, the researcher emailed potential research participants in October and November of 2021. This email included an overview of the study, the selection criteria, the Participant's Bill of Rights (Appendix B), the Informed Consent Form (Appendix D), and contact information for the researcher in case potential participants had questions about the study. The informed consent form was signed by the respondent prior to scheduling the interviews.

Types of data. The two types of data collection used for this study were semi-structured interview questions and examination of artifacts. Both data elements allowed the researcher to gather meaningful data to analyze, code, and categorize into various themes and patterns. Thorough effort was made to ensure the interview questions aligned with the purpose of the study and the research questions to ensure the data was aligned with the research questions, which sought to identify the challenges experienced and best

practices recommended by marketing directors, through the lens of AT, as they lead brand and culture alignment.

Semi-structured interviews. Interviews are commonly used in qualitative research to gather data. There are structured and unstructured interviews; however, the most customary method is semi-structured. In this approach, interview protocols are created in advance to create the necessary structure, however, the interviews can then follow the natural progression of conversation rather than precisely following the interview guide (Patten, 2014). This natural progression can also add to the interview process, creating an authentic approach to data collection. Semi-structured interview questions were used to explore the research questions for this study.

Artifacts. Artifacts are physical exhibitions that help to define a person's "experience, knowledge, actions and values" (McMillan & Schumacher, 2010, p. 361). The researcher gathered artifacts related to the lived experiences of marketing directors and how they encounter leading brand and culture alignment at their private non-profit higher education institutions. Examples of artifacts were visual representations of the private non-profit higher education institutions' missions, visions and core values, brand guidelines, and verbal and visual brand identities. Artifacts were used to explore the research questions for this study and triangulate data against the data generated through the interviews.

Data collection procedures. Outlining the methods for data collection is imperative so future researchers are able to replicate the study. This section identifies the procedures the researcher used for data collection.

Participant recruitment. The research questions associated with this study sought to understand the lived experiences of marketing directors, and the best practices they use and challenges they face as they lead brand and culture alignment at their private non-profit higher education institutions. The following criteria were followed when recruiting the participants for the study:

1. An email was sent to the marketing director(s) at each private non-profit higher education institution, inviting them to participate in the study. This invitation (Appendix C) included an overview of the study, the selection criteria, the *Participant Bill of Rights* (Appendix B), the *Informed Consent Form* (Appendix D), and contact information for the researcher in case potential participants had questions about the study.
2. Each potential participant was asked to verify that they met three of the six sampling criteria and to respond to the researcher to confirm their commitment to participating in the study.
3. As required, after 2 weeks, the researcher followed up with a reminder email and/or phone call, to those potential participants that did not respond to the initial inquiry.
4. Once the researcher confirmed the participant met the criteria for the study, prior to scheduling, a designated time for the interview was chosen that was suitable for the participant.

Attention to detail was fundamental in the selection of participants for this study.

Semi-structured interviews. Interview questions were created specifically to align with each research question and were broken down based on the various sections of the

theoretical framework, AT. Once the researcher identified the research participants through the steps outlined in the sampling procedures, the following steps were completed for the interview process:

1. Taking into consideration the COVID-19 pandemic as well as time constraints and travel time for the researcher and participant, virtual interviews were conducted through the use of Zoom.
2. Once a participant confirmed the meeting, a meeting invite for scheduling was sent via Google document. The invitation included a link to the Zoom meeting as well as the Participant's Bill of Rights (Appendix B) and the Informed Consent Authorization Form (Appendix D). The participant was asked to digitally sign and return the informed consent prior to the scheduled interview and were provided with a list of potential artifacts to submit after the interview as a part of the data collection process.
3. Once the form was signed, the researcher verified receipt and provided a copy of the interview questions (Appendix H) and term definitions (Appendix G) for reference.
4. Before the official interview started, the researcher checked the technology to ensure it was working properly and asked the participants if they had any questions or concerns. The researcher also communicated to the participants that at any time a break could be taken, and the interview would stop to accommodate, and it could reconvene when the participant returned. Additionally, contact information was shared with email and cell phone in case any issues with technology occurred. Lastly, participants provided their

consent to be recorded (video and/or audio) using Zoom to record and transcribe.

5. The researcher verified that the participants examined and understood the Participant's Bill of Rights and the Informed Consent Authorization Form.
6. It is essential to maintain the confidentiality of all participants. Protecting the privacy of each participant was thoroughly explained prior to the interview process. Additionally, the researcher listed on the Informed Consent Authorization Form that the results from this study would never identify the participants' names or institutions.
7. The researcher explained to each participant that after processing interview data, the researcher may reach out for clarifying questions as needed.
8. After the researcher established consent and resolved any questions from the participants, the purpose of the study was summarized, and consent forms and confidentiality were confirmed.
9. Once the participant confirmed consent, the researcher utilized the interview protocol (Appendix H) to conduct the interview. The researcher then asked 16 semi-structured questions that aligned with purpose statement and research questions.
10. As needed, follow-up questions were conducted to learn more or explain any responses, so a clear understanding of the participants' lived experiences were comprehensive. The follow-up questions were diverse based on the participants' replies. Interviews lasted 1 hour.

11. Following the interview, the audio from each participant interview was uploaded to an online speech-to-text program. The program provided a typed transcript of each interview. A copy of the transcript was reviewed to remove noticeable transcription errors and provided to the participant via email for review so any modifications could be made prior to coding. Once approved, the final copy was emailed back to the researcher.
12. After each interview was complete, the researcher emailed the participant a thank you note and $25 gift card in appreciation of their time and assistance with the study.

***Artifacts*.** To cultivate a deeper understanding of the phenomenon, artifacts were collected. The following procedures were used to gather the artifacts.

1. After each interview, the researcher asked the participants to submit artifacts that aligned with the research questions and answers provided. Some of these examples provided were the private non-profit higher education institution's brand guidelines, core values, mission and vision statements, branded marketing projects like the Admissions Viewbooks, and the university magazine. Although a sample list was provided, participants were not bound to the list. They were permitted to submit any artifacts they deemed appropriate to help the researcher answer the research questions.
2. Prior to data analysis, artifacts were provided, but not required, by the participants via email as attachments or as links to their institution's website.
3. Upon receipt, each artifact was saved in a digital format that was password protected for data analysis at the appropriate time. The artifacts did not

indicate the participant and only connected with a participant ID number to protect privacy. Furthermore, all information was identifier-redacted, and confidentiality was maintained. All paper copy documents (i.e., data, consents) were securely uploaded into digital files. Upon completion of the study, all recordings were deleted, and paper copy documents were confidentially shredded. All digitally stored documents will be securely stored for three years then fully deleted.

Data Analysis

McMillan and Schumacher (2010) explained that data collection could be carried out by measuring techniques, widespread interviews, observations, or documents. This qualitative phenomenological study gathered data using the method of semi-structured interviews, and artifacts. The analysis of the data occurred after the data gathering was complete. The researcher then segmented the data and clearly identified codes and themes to present the data in a manner that stays true to the participants responses and experiences as outlined during each interview.

Creswell's (2014) process of data analysis was utilized when assessing each interview. The following steps were followed in the data analysis process:

1. The researcher coordinated and prepared data.
2. The researcher gathered artifacts in a digital format.
3. The researcher posed theoretical concepts from previous experiences and literature.
4. The researcher scanned for patterns, themes, or categories.
5. The researcher examined data and identified the themes or categories.

6. The researcher examined the data for significant themes that directly connected back to the research questions for the study.
7. The researcher identified those specific themes that answered the research questions for the study.
8. The researcher coded the data using NVivo® software, to the previously identified themes. The researcher assessed the frequency of the themes to understand how they helped to answer the research questions for the study.
9. After the researcher coded the data, the researcher worked with an expert who was experienced with qualitative research and the coding of qualitative data to validate through intercoder reliability that the data had been coded appropriately.

Limitations

The researcher applied thoughtful tactics within each of the aforementioned areas to decrease the impact that the limitations could have on the study. Patton (2014) shared that studies can be inhibited by limited resources, time, and intricacies of the world that may not generate easily within the parameters of the study. Listed subsequently are each of the limitations and the manner in which they were addressed by the researcher:

Researcher bias. Qualitative research requires the researcher to participate in both data collection and analysis. Bias can ensue in any research stage: research design, data collection or data analysis. Patton (2015) explained that the researcher is the instrument of investigation when it comes to qualitative research. Because of this, it is imperative that policies are followed to ensure bias is limited as much as possible. Examples of policies to mitigate potential bias include: pilot interviews to test interview

questions and make any alternations prior to the official interviews, content experts reviewing interview questions for precision and connection back to the research questions, and finally, intercoder reliability used to validate the coding, frequency, and themes that come out of data analysis. Additionally, once the data was examined, intercoder reliability was utilized to ensure the research was accurate, the results were satisfactory, and the methodology used for data collection was consistent. Lastly, the researcher of this study was a marketing director with over 16 years of experience in marketing in higher education, and specifically with private non-profit higher education institution. The researcher's experience in higher education marketing could lead to researcher bias. Each of the elements helped preserve and protect the limitations in the study.

Sample size. Sample size signifies the number of subjects who participate in a study (McMillan & Schumacher, 2010). The sample size for this study was 15 marketing directors in private non-profit higher education institutions. The sample size of 15 marketing directors could be a limitation because it does not fully represent all marketing directors in private non-profit higher education institutions, which therefore may inhibit the researcher's ability to generalize the data.

Self-reported data. Qualitative research involves participants self-reporting their experiences throughout their interview. The researcher decreased the influence of this occurrence through triangulation of the data by using artifacts and interviews.

***Self-reported data participant bias*.** Participant bias, or subject bias, is the propensity for the participant in the study to either intentionally or unintentionally respond or behave in a way that they believe the researcher wants them to act (Patton,

2015). Participation bias is more likely when the participants understand the purpose of the research. Participants understood the purpose of this study; therefore, there was a potential for bias. Additionally, all participants were marketing directors; therefore, there was potential for the participants to have provided responses in line with the study. Taking these into consideration, the researcher was aware that the self-reported data could have been a limitation. To address these limitations, the researcher triangulated the interviews with artifacts to substantiate the participants' responses.

Timing of study. The timing of this study poses another potential limitation. The study was conducted in the fall and winter of 2021, as leaders were still navigating the COVID-19 pandemic and were just beginning to see the potential economic, enrollment, and fundraising impacts at private non-profit higher education institutions. According to an IAU Global Survey Report from 2020 titled, *The Impact of COVID-19 on Higher Education Around the World*, Marinoni, Van't Land, and Jensen (2020) shared that the pandemic has had an immediate impact on higher education and how all departments performed, leading to consequences that will be experienced far in the future. Similar to most organizations, private non-profit higher education institutions were cautiously navigating unknown terrains, posing less than ideal circumstances for data collection.

Summary

In Chapter III the researcher addressed the purpose of the study, research methodology, data collection methods, data analysis techniques, and the limitations of the study. This chapter thoughtfully embraced the researcher's goals and navigated the reader through each step taken during the data collection and analysis process while also addressing issues with the limitations of the study. Meticulous consideration was given to

ensure the research questions were addressed by the data that was gathered during the study and that the data detailed the lived experiences of marketing directors in private non-profit higher education institutions as it related to brand and culture alignment.

CHAPTER IV: RESEARCH, DATA COLLECTION, AND FINDINGS

Overview

This study focused on exploring the lived experiences of marketing directors and identifying the challenges and best practices experienced while leading brand and culture alignment in private non-profit higher education institutions. Chapter I of this dissertation provided a brief overview of the organization of the study, background on the core topics in this study and a statement of the research problem. Lastly, it presented the purpose statement and research questions and closed with the significance of the study.

Chapter II of this study focused on a review of literature. The review of literature outlined each variable associated with this study. It explored the history of higher education in the United States and presented background on marketing, branding, and culture in higher education. Finally, it examined the literature associated with marketing directors in higher education and the roles and responsibilities leading brand and culture alignment as well as the history of the theoretical framework, AT.

Chapter III presented the research methodology used for this study. The theoretical framework of AT (framework used to explore an activity) was discussed, defining the subject, object, and outcome using the AT methods of: rules, community, division of labor, and tools. An exploration of research design, population, and sample populations was presented, with a focus on the instrumentation, steps taken to control researcher bias, increase validity and reliability, and data collection and analysis procedures for this study. The chapter ended with a discussion of the study's limitations.

Chapter IV of this study provides a detailed analysis of data collection in which the researcher examined the lived experiences of the challenges and best practices of

marketing directors at private non-profit higher education institutions. This chapter includes a brief restatement of the purpose of the study, research questions, research methods and data collection process, population. and sample. Furthermore, this chapter presents participants' demographic data and concludes with a presentation and analysis of the findings organized by the research questions and the study's framework, AT.

Purpose Statement

The purpose of this phenomenological study was to identify and describe, through the lens of AT, the challenges and best practices of marketing directors at private, non-profit higher education institutions on how they lead brand and culture alignment.

Research Questions

1. Through the lens of AT, what are the challenges marketing directors at private, non-profit higher education institutions experience as they lead brand and culture alignment?
2. Through the lens of AT, what are the best practices marketing directors at private, non-profit higher education institutions recommend to lead brand and culture alignment?

Research Methods and Data Collection Procedures

A phenomenological, qualitative approach using AT was selected to analyze the lived experiences of marketing directors at private, non-profit higher education institutions to determine how they lead brand and culture alignment. Fifteen marketing directors from private non-profit higher education institutions in California participated in the study. Additionally, because this study sought to examine the lived experience of marketing directors, the researcher used semi-structured interview questions.

Interview questions in this study were purposefully designed to align to each research question and were separated into four categories (rules, community, division of labor, and tools) using the theoretical framework, AT. Interviews were scheduled via email and conducted via an online meeting platform, Zoom, at a date and time most convenient to the participants. During each interview, the researcher followed the interview protocol, which consisted of 16 questions. Probing questions were asked as needed if the researcher required more insight or clarification. The researcher conduced 15 semi-structured interviews (see Table 4). All 15 participants represented a private non-profit higher education institution in California.

At the conclusion of each interview, the researcher downloaded each participant's transcript. The researcher cleaned up any errors and emailed a copy of the transcript to the participant for verification of accuracy. None of the participants requested changes to their transcripts. The researcher moved forward on reading through each transcript meticulously, reviewed artifacts that were provided in a digital format via email after the interview, and began to make notes and record general thoughts about the data that connected back to the research questions for the study. The data was then organized into an Excel spreadsheet and formally coded and labeled into categories. The codes were then structured into key themes that told a story and answered the research questions using the NVivo software program. Lastly, themes were organized into the four categories of the AT framework, rules, community, division of labor, and tools.

Population

The population of this study consisted of marketing directors at private non-profit higher education institutions in California. According to the *US News and World Report*,

and National Center for Education Statistics, there were 3,982 higher education institutions in the United States in the 2019-2020 school year. Of those 3,982 institutions, a total of 1,660 were private non-profit higher education institutions (Cohen & Kisker, 2009). Typically, an institution has one marketing director responsible for branding. Given this, the population of this study is 1,660 marketing directors.

Target population. The target population for this study was marketing directors at California private non-profit higher education institutions. Out of the 1,660 private, non-profit higher education institutions in the United States, there are 150 private, non-profit higher education institutions in California according to the Public Policy Institute of California (n.d.). If each of those institutions has at least one marketing director, it is estimated there are 150 marketing directors in California.

Sample

Sample sizes should be selected with the aim of generating rich data. Based on the target population and sampling criteria (described subsequently), along with combined recommendations from the phenomenological research experts, the sample size for this study was 15 marketing directors at private non-profit higher education institutions in California. Figure 15 illustrates a summary of the breakdown of population, target population, and sample population for this study:

Figure 15: Population, Target Population, and Sample Population

Sampling procedures. The study investigated the lived experiences of 15 marketing directors at private non-profit higher education institutions in California. To further narrow down the population, and complete a study with rich data, criterion sampling was used.

Criterion sampling. Criterion sampling entails choosing participants for a study using a predetermined criterion of significance (Patton, 2001). For this study, participants were specifically chosen using a predetermined criterion of being a marketing director at a private non-profit higher education institutions. To ensure the research participants had ample expertise and to further narrow the target population for this study, the following criteria was applied to the target population. To qualify for the study, participants must have met three out of the six criteria:

1. Must hold a title of marketing director;
2. Must have held the title of marketing director at a private non-profit higher education institution within the last 3 years.
3. Must have worked in higher education for at least 1 year;
4. Must have served as a marketing director at their current private non-profit higher education institution in California for at least 1 year.

5. Must be involved in a professional association like the AMA or PRSA.
6. Must be the primary person responsible for branding at their private non-profit higher education institution.

After prospective participants were confirmed to have met three out of six of these criteria, a sample population of 15 marketing directors was identified.

Demographic Data

This study included 15 participants from 15 private non-profit higher education institutions in California who met eligibility criteria. Specific demographic information was collected from the institution's website or gathered from the participants during the interview process. Demographic information included gender, position, years of experience in Higher Education and years of experience as a marketing director (see Table 4). Gender demographics included 60% females and 40% males, with over 60% of the participants serving in higher education for over 10 years. The sample's years of experience in the marketing director role ranged from 2-18 years.

Table 4: Research Participant Demographics

Participant	Gender	Years of Experience in Higher Education	Years of Experience as Marketing Director
Participant 1	F	17	3
Participant 2	M	14	6
Participant 3	F	6	3
Participant 4	M	6	9 M*
Participant 5	F	4	5 M*
Participant 6	F	7	3
Participant 7	M	3	3
Participant 8	F	16	4
Participant 9	F	22	17
Participant 10	M	30	8
Participant 11	M	20	15
Participant 12	M	18	18
Participant 13	F	15	3
Participant 14	F	12	3
Participant 15	F	6	2

Note. *Participants 4 and 5 had both worked in marketing positions at the institution and were recently promoted to marketing director.

Presentation and Analysis of Data

The findings in this section include the outcomes of 15 participant semi-structured interviews, totaling over 20 hours of interviews, as well as a review of artifacts. Data from each participant was evaluated carefully to answer the two research questions. Accomplishing this goal required the data to be organized into themes and coded based on the two research questions. Once the data was evaluated, the researcher used the AT framework to help clarify the complex interactions of marketing directors by organizing the tensions of challenges and best practices into the four AT categories: rules, community, division of labor, and tools. The following data is presented from highest to lowest frequency within each AT category. Additionally, a list of all themes, sources, frequencies, and corresponding AT domains are also provided for clarity (see Table 5).

Table 5: Themes, Sources, Frequencies, and Corresponding AT Domains

Theme Area	Themes for Best Practices	Source	Frequency	AT Domain
Best Practices	Aligning Brand & Culture with Institutional Values	15	247	Rules
	Marketing Directors Foster Positive Relationships with Departmental Representatives	15	220	Community
	Conducting Brand Guideline Education Training	14	135	Rules
	Establishing Marketing Agency/Centralized Department with Authority	14	119	DOL
	Students Feel Connected to Institutional Brand & Culture	15	104	Community
	Top Down Support for Brand & Culture Alignment	15	92	DOL
	Marketing Voice at Leadership Table	14	68	DOL
Challenges	A Lack of Strong Stakeholder Relationships Distort Brand & Culture Alignment	15	156	DOL
	Resistance to Utilizing Brand Guidelines	15	113	Rules
	A Lack of Adoption of Brand Toolkit Materials	14	106	Tools
	A Need for Adequate Marketing Staff & Resources	13	92	DOL
	Faculty are Disconnected from the Goals of Marketing Directors	12	82	Community
	A Lack of Adequate Brand Education for	13	79	Rules

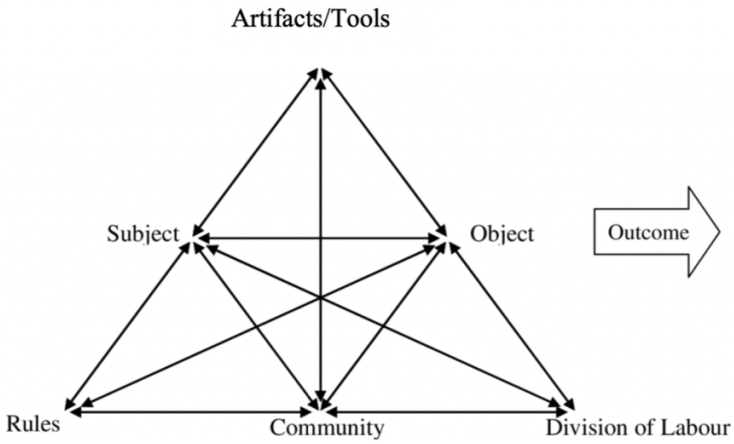
Theme Area	Themes for Best Practices	Source	Frequency	AT Domain
Unexpected Findings	Institutional Community Brand Guidelines Part of HR Onboarding Process	8	22	Rules
	Biblical Beliefs Drive Brand & Culture at Faith-Based Institutions	8	46	Rules
	Reinforcement of Athletics Brand that Support Institutional Brand	7	29	Rules

Activity Theory

Data for this study was coded based on two research questions. This research focused on the activity system to participants within the activity: marketing directors (subject) and the challenges and best practices (object) as they lead brand and culture alignment (outcome) at their private non-profit higher education institution. These areas are signified as domains or tensions. All of the four AT domains were applied to the study, including: rules, community, division of labor, and tools (see Figure 16). Due to AT's complex nature, AT domains represent individual variables in an activity; however, they can also be interconnected. This connection may cause overlap in how participant data was organized using AT. This study utilized one central domain to investigate the data on both frequency count and perspective of the theme.

AT is a descriptive framework instead of a predictive model, which allows AT to be used in a manner that objectively explains the assorted tensions that can make up activity systems. Additionally, the goal is to use the AT model to clarify multifaceted systems and understand how the domains (rules, community, division of labor, tools) may influence the subject, object and outcome. The domains, or tensions, used in this study refer to the challenges or best practices.

Figure 16: Engeström's Expended Activity Theory Model

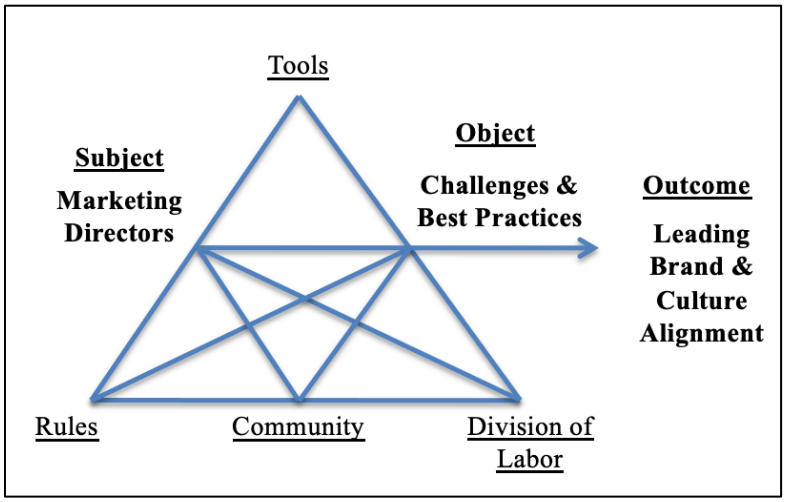


Reprinted from "Work as a Testbench of Activity Theory," by Y. Engeström, 1993, in S. Chaiklin and J. Lave (Eds.), *Understanding Practice: Perspectives on Activity and* Context (p. 65–103). Cambridge, YK: Cambridge University Press. Copyright 1993 by the author.

Subject, object, and outcome. The core framework of an AT activity system centers on the subject, object, and outcome. Engeström (2001) explained that AT has a focus on the connection of human (*subject*) activity having purpose (*object*) that is carried out by actions through the use of tools to achieve that purpose (*outcome*), which can be both physical or psychological. The center of this relationship focuses on the subject and the object. Simply described, AT defines "who is doing what, why, and how" (Hasan & Kazlauskas, 2014, p. 9). The outcome of AT signifies the concluding step in the activity system. The domains that remain (rules, community, division of labor, and tools) fuel the subject to move toward the object. The outcome can be inadvertent or deliberate and should be considered independent from the object. In this study, this is demonstrated as marketing directors (*subject*) and the challenges and best practices (*object*) as they lead brand and culture alignment (*outcome*) at their private non-profit

higher education institution. (see Figure 17) The remaining domains of the activity system provide the outcome that is desired for that activity.

Figure 17: A Visual Representation Showing Subject, Object, and Outcome in the AT System



Evaluation was needed to explore the roles of rules, community, division of labor, and tools to accurately describe how subjects achieved their desire outcomes. The elements denote the connected tensions that influence or direct the subject. For example, the participants described a best practice of marketing directors fostering positive relationships with departments across campus to lead brand and culture alignment. Participants leveraged rules in each of the community groups to achieve their desired outcome: leading brand and culture alignment.

Organization of the Study

The two central research questions were designed to produce a deeper and balanced understanding of the purpose of the study. Understanding the AT domains of rules, community, division of labor, and tools allowed for the exploration of both challenges and best practices that marketing directors experience when leading brand and

culture alignment. The researcher chose two questions, so illustrating the domains on a AT triangle allows for clear understanding of the complexities of both the challenges and best practices that marketing directors face when leading brand and culture alignment. The organization of the study was structured in this way to address the phenomenon of the study.

Major Themes

The participants shared challenges and best practices they experienced when leading brand and culture alignment at their private non-profit higher education institution. These major themes represent recurring subjects or topics collected from participant responses. The themes are valuable to understanding marketing directors' experiences when leading brand and culture alignment. The themes were utilized to construct the findings and unexpected findings, as outlined in this chapter.

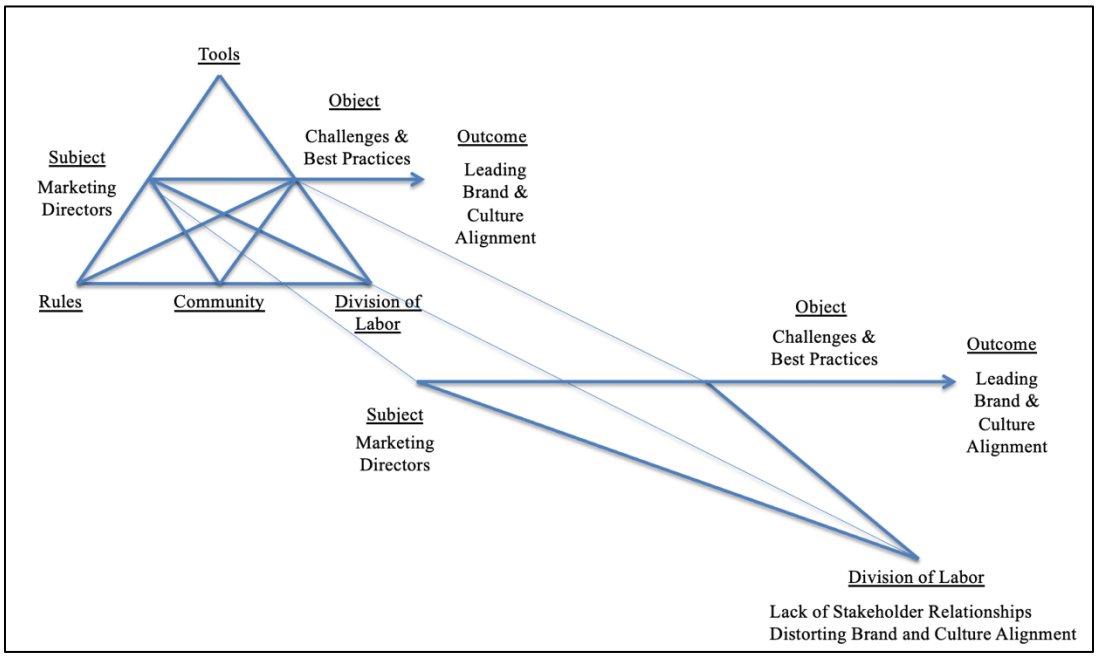
Challenges

Six key components encompassed the challenges that marketing directors face when leading brand and culture alignment. It should be noted that no artifacts were collected to demonstrate the challenges that marketing directors faced when leading brand and culture alignment. Challenges were distributed across four of the areas of AT, two in division of labor, two in rules, one in community, and on in tools.

AT division of labor. The most common challenge that participants shared was a lack of strong stakeholder relationships that distort brand and culture alignment. Division of labor describes the structure of who does what in relation to an individual, object, initiative, or purpose responsible for executing different tasks. For this study, division of labor could include, but was not limited to: the Office of Marketing & Communications,

President, Administration, or institutional departments. Although participants shared the importance of community within relationships, the central AT domain considered for this theme was division of labor. As demonstrated visually in the model, one can see the role of division of labor in the context of this study (see Figure 18).

Figure 18: A Visual Representation Showing the Division of Labor as a Lack of Strong Stakeholder Relationships Distorting Brand and Culture Alignment in the AT System



A lack of strong stakeholder relationships distorts brand and culture alignment. This theme occurred in the data in 156 instances across all 15 participants. This distortion and lack of stakeholder buy-in included challenges such as siloed departments, poor collaboration, and minimal understanding of what marketing directors and their teams can do for the institution. Many participants shared that the lack of stakeholder relationships caused a disconnect with brand and culture. For example, Participant 1 shared that departments lacked the understanding of what a marketing team is capable of

doing, what they should be doing, and what they can do to support the institution. Participant 10 also expressed frustration around departments moving forward on institutional branding projects without any input from marketing and shared how higher education institutions can be very siloed, noting that the poor collaboration between the marketing department and the institution causes potential conflict "diluting the brand." Participant 4 voiced how slow it can be to get people on board and to get them to see that marketing is not trying to take over and take them out of the process. Participant 7 expressed that relationships are challenging due to "inherent suspicion of anything coming out of the marketing office." Participant 10 further explained that there is a need for a key person who helps nurture department relationships:

> We need someone whose chief responsibility is cultivating those relationships with other departments and educating them and informing them and making them feel good about, here's how we can service you, here's how we can help you do your job better. Here's, how it fits into the big scheme of things and why we will all succeed, as an institution.

Participant 15 echoed this sentiment, stating that the biggest challenge is the lack of understanding that "they are a part of the brand, and that is substantial."

Another area that had a lack of strong stakeholder relationships that caused a distortion of brand and culture alignment centered on relationships with admissions. Participant 10 shared that admissions is so siloed, they have their own marketing staff that works independently from the marketing department. The marketing team will receive recruitment materials they never viewed in production, and admissions does not collaborate with the institutional marketing staff on how to ensure brand and culture

alignment. Furthermore, Participant 10 shared that their admissions department branded for style, campaigns, or themes that did not fit the institutional brand, and there were times when there was no inclusion of a phone number or website. At times their content included grammatical errors that could have been caught or fixed with more input from the marketing department. Participant 7 also expressed the feeling of being "divorced" from admissions, whereas Participant 8 shared they wished they had a better relationship with the Director of Admissions because of how important that partnership is to marketing, and the lack of relationship hurts any type of collaboration and partnering on projects, especially when it comes to recruiting students, which causes an immense disconnect. The admissions department struggles with communication as well, with Participant 2 voicing how admissions does not understand the "nuance of how to manage communications in a way that will resonate with not only our current community, but prospective students."

A third area where poor stakeholder relationships distort brand and culture alignment centered on relationships with advancement and student affairs. Participant 1 shared that there was a decentralized relationship with advancement and "a lot of toxic attitudes." Participant 12 also expressed how advancement did not see the need to partner with marketing. Participant 14 voiced how difficult the relationship with advancement was because of an existing departmental culture that discounted marketing partnerships. Participant 1 expressed how student affairs did not support marketing when it came to projects for student events, whereas Participant 6 shared challenges with student affairs going rogue and rebranding their department without marketing's involvement. Participant 8 similarly voiced that marketing does not work with student affairs as well,

further demonstrating the lack of division of labor due to lack of stakeholder relationships.

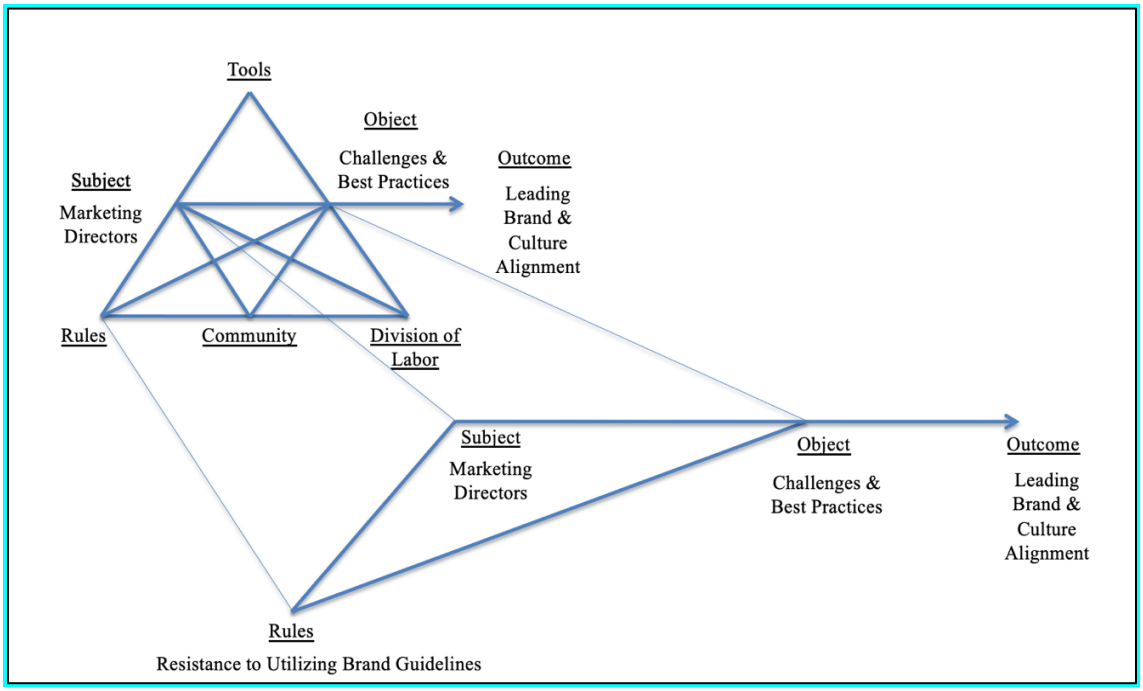
The last area centered on the lack of stakeholder relationships within leadership on campus. Participant 11 described a mentality that was very "us versus them" and how the lack of support caused a divide in the relationships, where the feeling centered on "stay in your sandbox," and then it felt like a free for all where leadership did not require brand standards to be followed. Participant 15 also expressed a disconnect of brand and culture because of the lack of participation from leadership. Participant 15 went on to explain how it is not that leadership did not like or support the brand, they just did not adopt or model the brand for the institutional community or participate in brand and culture. Participant 15 went on to express how this situation causes difficulty with marketing because people look to leadership as a guide. Participant 15 expressed that "leadership adoption is the dream" of brand and culture alignment. Participant 2 also shared that communicating with senior leadership was challenging at times and sometimes communication around brand and culture is not received in the way it needs to be received. Furthermore, Participant 6 expressed:

> When a leader or someone in senior leadership doesn't support the brand or doesn't understand what the brand is, that's going to be a challenge because it trickles down to even the lowest level staff that's under that person. That becomes a problem to us marketing professionals because we interact more with a lower-level staff because they do the hard work, they do all the nitty gritty stuff. And if they don't understand the brand, because their supervisor or their VP doesn't understand it, then why would they understand it?

Participant 15 further drove home the importance of the division of labor tension, sharing, “If you want the organization to be successful, then you need to participate in the success, which includes participating in the brand.” They also provide additional support; “that’s probably the bigger piece is just not understanding that they are connected to the brand, whether they want to be or not.” Participant 2 shared that there are best practices around branding and culture; however, when leadership is articulating something different and the messages are inconsistent, that is “where the trouble starts.” Participant 15 also voiced the importance of the division of labor with leadership because they are the people working with the community who need to understand brand and culture alignment. Each of the challenges depicts a division of labor where the marketing director’s lack of stakeholder relationships was distorting brand and culture alignment and hindering their ability to lead brand and culture alignment successfully.

AT rules. The second most cited form of challenges included resistance to utilizing brand guidelines. The AT domain that was considered for this support was rules. As demonstrated visually in the model, one can see the impact of rules in the context of this study (see Figure 19). For this study, rules could include but were not limited to brand guidelines, cultural norms, mission, vision, or values of the marketing director’s private non-profit higher education institution. Participants shared how the resistance to rules around brand guidelines was a challenge to leading brand and culture alignment.

Figure 19: A Visual Representation Showing Rules in the AT System



Resistance to utilizing brand guidelines. This theme occurred in the data 113 times across all 15 participants. One of the first areas of resistance focused on institutional departments creating their own type of brand and not following the brand guidelines set in place by the marketing director and marketing team. Participant 1 shared that institutional employees would create their own marking flyers and pieces and chop up the logo, which damaged the brand. Additionally, this would affect social media, with various departments creating their own social media or Instagram pages and not employing the proper institutional logo. Participant 10 voiced that some departments believe branding is a personal preference and that some leaders feel they know better than marketing, so they resist using brand guidelines. Participant 2 shared that they had schools create their own seals and use their own colors and write their own mission statements, almost operating as if they were little universities. This was also reflected by Participant 3, a department went "rouge with their own logo" and refused to stop using it

even after they were asked numerous times, stating that department's attitude reflected, "what are you going to do?" Additionally, Participant 3 expressed how some departments feel like "we're going to do it the way we want to do it and I don't really care what your little brand strategy is like."

Another area where marketing directors felt resistance to brand guidelines centered around the inability to embrace the change that caused the resistance. Participant 12 shared that the resistance they had seen sometimes centered on "experience and tenure, and they've been there for 15 years and this is the way we've always done it." Participant 10 expressed how some departments feel they do not need marketing and they have better ideas, so "they plow ahead with promoting their own silo without referring to brand guidelines or following it." Participant 14 shared how faculty expressed feeling like "cattle being branded." Additionally, Participant 14 voiced how some departments who have long-standing employees are used to doing things a certain way because they do not want to work with marketing. Furthermore, Participant 14 shared how some individuals feel "this is how we've done it, so it's not going to change." Participant 15 discussed brand guidelines and how adoption of the guidelines can be very difficult because department members do not want to change, instead preferring to hold what is really close to them. Participant 3 and 6 echoed this sentiment, sharing how some employees get really upset and angry when they are asked to use the brand guidelines, with some employees even sharing the "guidelines feel like it's a prison to them."

The last area of resistance to brand guidelines focused on resistance leading to diluting the brand. Participant 10 expressed that resistance "dilutes the brand" because people are receiving many different variations of the brand. This causes a lack of visual

connection to the brand and could even create a negative sense of the brand. Furthermore, Participant 10 voiced that at times institutional employees may come to the marketing department for help but are not really interested in following the brand guidelines and do not believe the marketing department really has the final say, causing a lot of pushback when it comes to using brand guidelines. Participant 13 used this same verbiage of pushback and shared that departments would even pose the question, "Why do we need marketing? Only colleges that are struggling need marketing." There was an attitude that marketing was "beneath them" and some employees had a very "elitist" attitude against marketing. Participant 3 expressed how some employees are "just doing their own thing and waiting to get caught" because "they actively disagree with the premise of guidelines." Participant 3 elaborated on this, sharing,

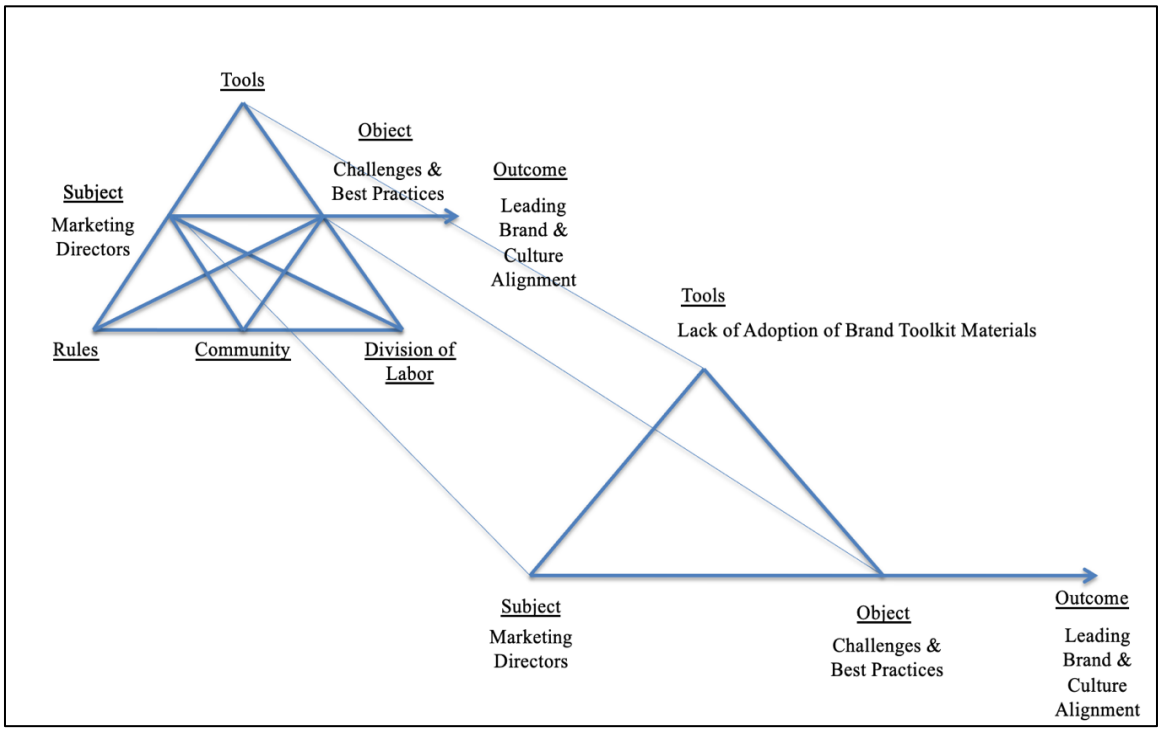
> A lot of people who produce marketing materials or communication materials are not in the marketing department, and are not professionals in this area. In fact, they have a chip on their shoulder and are against the idea of branding.

From an AT standpoint, the participants clearly shared how the resistance to the rules around brand guidelines is a challenge to leading brand and culture alignment. The AT activity system also provided a visual illustration of the challenge posed by marketing directors feeling resistance to utilizing brand guidelines when trying to lead brand and culture alignment.

AT tools. The next most cited challenge that participants shared was described as a lack of adoption of brand toolkit materials. Although some of these examples were also used to discuss AT rules, this theme refers to the tools of the brand guidelines that were a challenge for the marketing directors to get their institution to utilize regularly. As

demonstrated visually in the model, one can see the role of tools in the context of this study (see Figure 20). For this study, tools can be known as artifacts or instruments, and are anything internal or external used to assist marketing directors at private non-profit higher education institution. Samples of tools can include, but are not limited to: verbal or visual brand identity, culture drivers, marketing systems, and protocols or technology. Participants shared that many tools that posed challenges as they led brand and culture alignment at their private non-profit higher education institution.

Figure 20: A Visual Representation Showing Tools as Lack of Adoption of Brand Toolkit Materials in the AT System



A lack of adoption of brand toolkit materials. This theme occurred in the data 106 times across 14 participants. The tools that were referenced centered on the lack of use of brand toolkit materials that would help marketing directors effectively lead brand and culture alignment. One of the first areas that participants shared as a barrier was the

adoption of brand toolkit materials because the institutional community had a fear of looking the same as other departments. Participant 12 expressed that when they started in their new marketing role at their institution, one of their first tasks was to do an audit of the institution's marketing and communications. They found more than a dozen different logos and images that were being used by different entities within the institution. Participant 3 built on this theme and shared that departments at their institution are concerned that their marketing collateral will look and feel exactly like other departments, which causes them to go outside the brand toolkit to create their own materials. Additionally, Participant 9 expressed that the most difficult part of the branding process was that their institution was afraid everything would look the same when they adopted a brand toolkit. Participant 9 continued to share that at the beginning of their brand toolkit training, people were nervous that their pieces would look similar, so the marketing director and team figured out how to customize branded pieces for each of their schools. Participant 9 went on to share how the marketing team had to educate the institutional community that the brand toolkit was not about personal preference, and it can be a challenge to get certain departments on board in refreshing their materials.

Another area that caused a lack of adoption of brand toolkit materials was poor departmental partnerships. Participant 11 reported experiencing difficulty implementing brand toolkit materials due to partnerships "falling apart" and the feeling that "we're really messy right now with who we are." Participant 3 also voiced that there was not a lot of clarity when it came to the brand toolkit because partnerships were not strong. Participant 8 also shared frustration in this regard, expressing:

> It can be frustrating, because we educate them and we try to adhere to best practices and brand guidelines, and, not to sound unkind, but it doesn't always stick, and it gets frustrating when you feel like you're kind of banging your head against the wall.

Participant 8 also added that there are many attempts to gain partnerships and educate on brand toolkit materials where the marketing team conducts presentations to gain trust and get departments to work together, but that does not hold a "lasting effect" with departments.

The next area that caused a lack of adoption of brand toolkit materials was negative associations with using the brand toolkit. This negative association can affect the way the institutional community views using brand toolkit items like logos or fonts. Participant 10 shared that it is important to know how to use the colors, fonts, and styles; however, even if you have a strong logo, if people have no idea what it means or have a negative association with it, then it is "kind of dead in the water anyway." Participant 10 elaborated on this concept around the negative association with the brand toolkit, expressing that it is even more challenging to enforce the toolkit without coming across negatively, which is why education around the brand toolkit is important. Participant 11 also shared that they felt they drifted away from their brand toolkit and what they are known for, which made it more difficult to lead brand and culture alignment. Additionally, Participant 15 expressed that the adoption of the brand toolkit is difficult because many departments may believe it is not a part of their job to use or support the brand toolkit, which "kind of steps a little outside of aligning culture with brand."

These accounts provide a clear understanding around the challenges of using tools when marketing directors try to implement and educate the institutional community around the brand toolkit. The AT activity system also provided a visual illustration of the challenge that lack of adoption of brand toolkit materials poses for marketing directors when trying to achieve brand and culture alignment.

AT division of labor. A challenge that was also identified under the AT domain of division of labor was a need for adequate staff and marketing resources. This section will identify the challenges marketing directors face regarding the tension of division of labor with the need for staff and resources to effectively lead brand and culture alignment.

A need for adequate staff and marketing resources. This theme occurred in the data 92 times across 13 participants. The first area that participants shared was how the need for adequate staff and resources was causing them and their teams to be stretched thin and burned out. Participant 10 expressed how they found division of labor a challenge in their department because of lack of staff and that the marketing department was doing their best to serve all the different departments across the institution, causing them to feel overextended in their workload. Additionally, they also shared how they must balance both the strategy and the execution of projects within the small team. Participant 11 expressed how challenging it was for their team members to "wear multiple hats," but they did their best to make everything work for the institution. The issue of sustainability around the small staff also was expressed when Participant 11 shared how they had to bring to light all of the work their team was doing and how it was not a sustainable model because it felt like they were "doing three jobs."

Additionally, the challenge of wanting to take on more work for the institution was a struggle. Participant 13 voiced the disappointment of not having the capacity to take on all the work in their centralized department. Participant 14 echoed this sentiment expressing how common it is for institutional marketing teams to be "stretched super thin" because marketing teams touch every area of the institution. Participant 15 also underscored the dedication of their teams and the work they do and how that causes burnout, sharing, "people will work until they can't work anymore, because they care so much about the organization." Furthermore, Participant 15 added that they are "growing on the backs of too few people" and this model was causing more and more burnout. Participant 14 also echoed this same response, sharing her strong appreciation for her "very high-performance high-capacity team," but also recognizing that this same high performance also causes them to work to excess. Lastly, Participant 8 expressed the difficulty around lack of staff and the day-to-day job duties of the marketing teams. Additionally, Participant 8 shared how difficult it has been and how their staff feels so overworked, making it challenging to ask them to do anything above and beyond their job duties.

Another area that was shared about the challenge of adequate staff and resources focused on lack of staff to specifically meet program or institutional needs. Participant 11 shared the concern of adequately serving all the institutional programs, especially with staff cuts that added to the challenge. "They eliminated seven, eight people from our office…and so we're able to get things done, but if it was complete strangers, it would be a mess right now." Participant 3 also expressed this concern when they shared that they want departments to work with marketing, but when departments come to them for help,

they are not properly staffed to do the work, posing a challenge for them. Participant 3 added the discouragement they feel when the departments are really excited to work with marketing; however, without the right expertise in place, the marketing team is not able to serve the whole needs of institution to create marketing materials for everyone.

Another specific area that was shared was the need for an institutional videographer. Participant 13 expressed the need for additional support around videography because many departments are asking for professional branded videos. Participant 4 and 5 also reflected that sentiment, sharing the importance of a videographer as a strong need for the institution. Participant 8 expressed how imperative videography was to connecting with the next generation of enrolling students. “I think video with, YouTube, and now, TikTok, we’re trying to move into the TikTok world, and I just think video content is just very integral with Gen Z.”

The last challenge around adequate staff and resources centered on the lack of budget. Participant 1 shared that the concept around adding marketing staff is supported in theory, but when it comes to the cost of hiring staff, and benefits, it is not always budgeted for marketing. Further adding, that additional marketing staff would allow for a greater division of labor and benefit not only the marketing department, but also the institution as a whole. Participant 10 expressed the concept around adequately budgeting for marketing resources by sharing:

> I think that when it comes to the budget decisions, that is an education piece to understand that, yes, we (marketing) don’t generate dollars, but good marketing and branding, eventually does attract people, attracts talent, attracts students, and good relationships with the alumni and donors. And you really have to have buy-

in from the top that understands that. It's vital, and it's it may not be a direct income generator, but it is an income generator. Eventually. If done well.

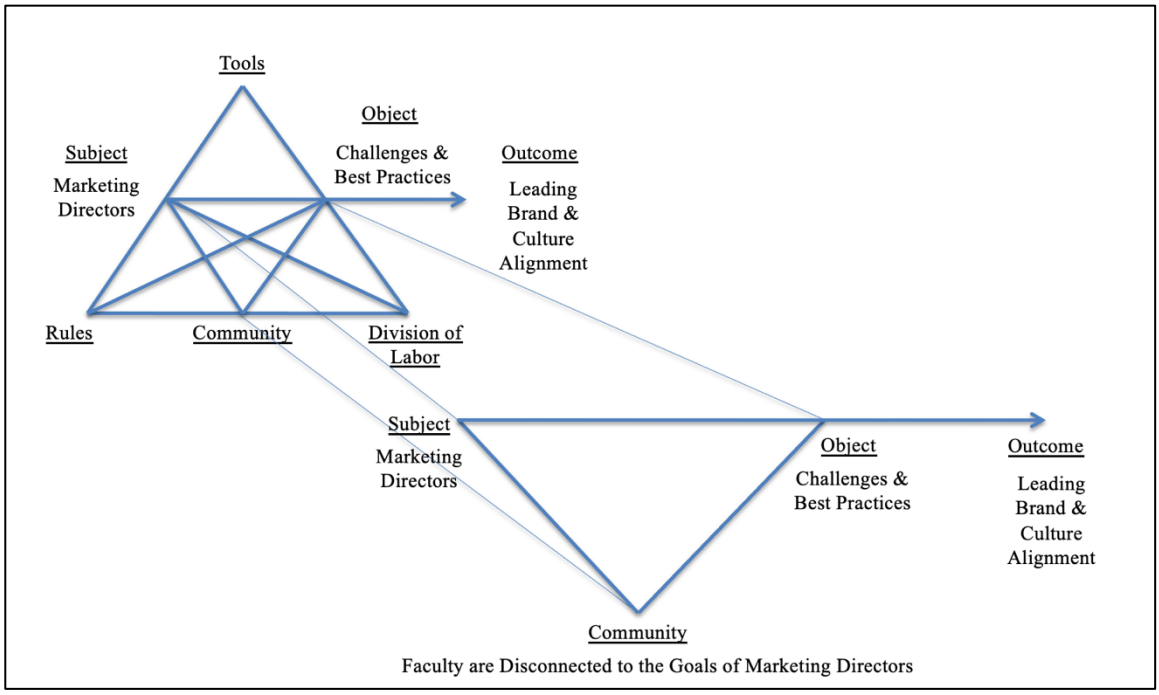
These accounts provide a rich understanding of the challenges of division of labor with marketing directors and the need for adequate staff and resources. The AT activity system also demonstrates the challenge posed by marketing directors' need for adequate staff and resources in leading brand and culture alignment.

AT community. A challenge that was also identified under the AT domain of community was how faculty are disconnected from the goals of marketing directors. This section will identify the challenges marketing directors face regarding the tension of community of faculty to effectively lead brand and culture alignment. For this study, community was identified as the connected group of individuals who share common values, work, or interests. Community can include, but is not limited to: faculty, staff, current students, potential students, donor and alumni. As demonstrated visually in the model, one can see the role of community in the context of this study (see Figure 21).

***Faculty are disconnected from the goals of marketing directors*.** This theme occurred in the data 82 times across 12 participants. The first area of focus centered on the desire from marketing directors to be respected in their expertise in leading the marketing goals for the institution. Participant 11 honestly described their frustration with how "faculty feel like they're experts in everything. And they [faculty] want to do their own things…and they want to stray outside." Furthermore, Participant 11 expressed the desire for faculty to understand the business and marketing perspective and how this lack of understanding with certain faculty causes tension with the goals of marketing directors:

Sometimes faculty have a little bit of arrogance, so they think that the programs, the students are always going to be there. And it's what they want to do in their program. But I don't think they understand the business side of it. It's a long lifecycle for what we're selling. Our goal is to be top of mind, if we can be one of the three schools someone's looking at, that's a success. They will see billboards or hear radio, I think they feel like it was a waste of money when they wanted to use it for other academic type purposes.

Figure 21: A Visual Representation Showing Community as Faculty Disconnected From the Goals of Marketing Directors in the AT System



Participant 13 expressed the challenge of faculty connecting the goals of marketing to the institution, sharing, "There's a different level of snobbery…there are certain faculty who do not want to work with us. Faculty comment, I don't know why we need marketing, we're not Coke. We're not selling something." Participant 13 went on to explain that the institution is selling the brand of the school to attract the right students

for their programs. Participant 14 echoed this sentiment, stating, “I think that a lot of times faculty see me and my role in my office as this slick sleazy advertising office that just spending money.” Participants found this fact discouraging as they are trying to meet the institutional goals for not only faulty, but for other departments. Additionally, Participant 7 voiced the unfortunate feelings around not being treated as a professional in their field when trying to help faculty market their program. “They’re not really treating me like a professional. They’re treating me as though I couldn’t possibly understand how to market their program. That’s certainly disrespectful because I feel I’ve put in the work to earn that respect with faculty.”

The next area that focused on faculty’s disconnect with marketing goals centered on a lack of partnership between marketing and faculty to reach institutional goals. Participant 11 expressed that it feels like an “us versus them” mentality and can feel tense at times because faculty may feel like “marketing won’t let us do this or marketing won’t let us do that.” Participant 11 added to this sentiment and expressed that faculty who have worked well with marketing have built a trusted relationship with them and it is the faculty who “feel like they are an expert in everything” who cause tension with marketing directors and their teams.

Participant 14 shared that “faculty are very challenging, they don’t want to adhere to brand guidelines, they want to see themselves as much more, autonomous, and they want to express the (institutional) brand from their particular area of expertise.” Participant 14 went on to share how this autonomy hurts the brand and culture goals of the institution. Participant 7 tries to build respect by consistently “fostering relations with the faculty and sort of trying to build those relationships and create liaisons.” These

relationships with faculty are fostered with the aim of aligning brand and culture for the institution.

These accounts provide a deep and transparent understanding around the challenges of community with marketing directors and how faculty are perceived to be disconnected from the goals of marketing directors. The AT activity system also demonstrates the challenge that faculty being disconnected from the goals of marketing directors poses for marketing directors when leading brand and culture alignment.

AT rules. The last challenge that was identified was under the AT domain of rules. This challenge focused on a lack of adequate brand training for the institutional community. This section identifies the challenges marketing directors face regarding the tension of rules with the need for brand training to effectively lead brand and culture alignment.

A lack of adequate brand training for the institutional community. This theme occurred in the data 79 times across 13 participants. The first area of focus regarding a lack of adequate brand training centered on a need for a formal way to train the respective community on branding. Participant 1 expressed that their institution does not have a clear process of how to handle brand training and because of that it diminishes the brand and culture experience due to the community's lack of understanding of the brand. Additionally Participant 10 shared the need for the opportunity to communicate institutional distinctiveness to help with brand training:

> A lot of times the marketing message is very similar from one private, higher education institution to the next. And I find it very challenging, but also important, that I help our institution understand, here's our distinctive, here's

what sets us apart, here's what's different about us, so we don't just look like every other small, private, higher education institution in our area.

The need to educate the community with structure was also voiced by Participant 12, who shared that there was not a cohesive structure at their institution when it came to value, brand, alignment, and brand identity when they first started at their institution. This gap was one of the reasons they were brought on to lead the marketing team, to help bring that cohesive structure to those areas. Participant 2 further added that processes around brand training have not "always been a strong value at universities in general" along with adequate training on best practices around branding and culture which effects how departments engage with the marketing department.

The second area of focus regarding a lack of adequate brand training centered on a lack of trust in marketing expertise to lead the brand training. Participant 10 shared their concern around building a balance of trust with the community to get buy-in with training. They shared, "how do you find the balance between reminding people, here's what we're doing and why and how often, without, getting people to roll their eyes, like, oh no, here comes the marketing department again." Participant 10 shared that it is the lack of education that causes the community to not recognize why brand guidelines are important, because they have not been educated as to what they mean. Participant 13 expressed that they should educate the community on why, as an institution, "we can't market ourselves as everything to everyone" and brand training could provide that education to the community about "putting those stakes in the ground" to understand their institutional distinctiveness. Participant 3 voiced the importance of the education on the visual and verbal identity of branding because the lack of training makes it even more

challenging to enforce brand messaging across the institution. Participant 3 shared further that it speaks to "a broader sense of understanding and what the institution is trying to say about ourselves, and how to position ourselves as an institution."

These accounts provide a more detailed description of the challenges of rules with marketing directors and the lack of adequate brand education for the institutional community. The AT activity system also demonstrates the challenge posed by a lack of adequate brand education for marketing directors when leading brand and culture alignment.

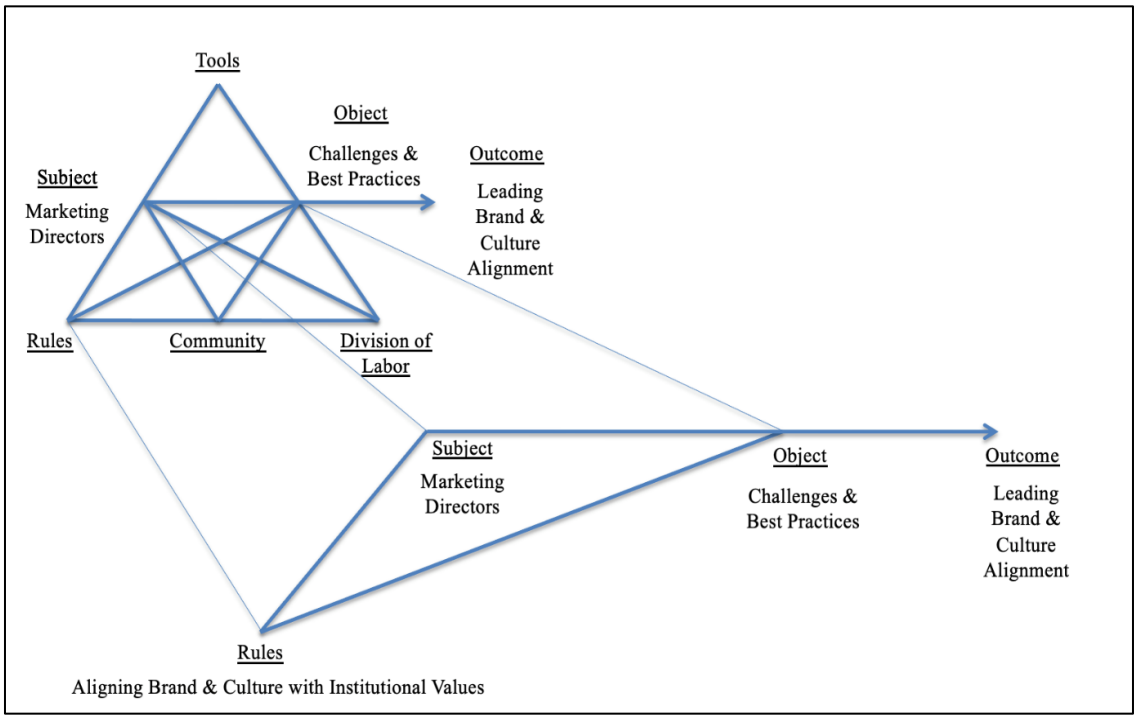
Best Practices

There were seven key components that encompassed the best practices that marketing directors identified when leading brand and culture alignment. Best practices focused on two areas of rules, three areas of division of labor, and two areas of community. To triangulate the data, eight artifacts pertaining to best practices were collected from two participants to ensure the validity of responses. The artifacts shared with the researcher could not be included in this section because they identified the institution, and it was essential to maintain the confidentiality of the participants and their private non-profit higher education institutions for this study.

AT rules. The most common best practice participants shared was aligning brand and culture with institutional values. This best practice was shared by all participants, and the central AT domain considered for this theme was rules. As demonstrated visually in the model, one can see the role of rules in the context of this study (see Figure 22). The participants shared the importance of aligning brand and culture with institutional values

and shared their experiences regarding the successful ways it works for them and their marketing department.

Figure 22: A Visual Representation Showing Rules as Aligning Brand and Culture With Institutional Values in the AT System



Aligning brand and culture with institutional values. This theme occurred in the data in 247 instances across all 15 participants. There were three keys areas on which participants focused when sharing their lived experiences around aligning brand and culture with institutional values. The first area focused on externally representing the brand and culture of the institution. Participant 1 expressed the significance of the visual "front facing of the institution" and how important it is that everything represents the brand of the institution. Participant 1 elaborated on the concept around branded pieces that externally demonstrated brand and culture with institutional values. They expressed how their branded pieces build off of their brand standards, which also share their

mission and the culture helping create alignment. Participant 10 echoed this statement, sharing that their institution "has been very good about reinforcing the mission, our mission statement comes up a lot in conversations, it comes up in marketing, it's built into a lot of things that we share with the public." Participant 11 reinforced this sentiment, expressing that collateral pieces like their undergraduate yearbook, general information brochure, and program brochures were strong examples of how they visually demonstrated their brand and culture. Participant 6 indicated that their viewbook was one of their best pieces because it authentically represented both visually and verbally the institutional brand and culture they wanted to share with potential students.

Another area the participants shared as a primary way to align the institution's external brand and culture with institutional values was through the website, digital, and social media channels. Participant 15 expressed that relaunching their institution's website was "substantial for us rolling out the brand and aligning it to the culture." Furthermore, they added that social media was another strong way to visually demonstrate brand and culture alignment. Participant 6 shared that their institutional website and Instagram were good channels to visually represent their brand and culture, because they gave the institution the opportunity to showcase their culture.

Building on this external representation of aligning brand and culture with institutional values was the importance of integration. This sentiment was shared by Participant 12, who expressed how essential it is to connect the values and the culture of the institution and integrate that with the branding of the institution. Participant 13 dug deeper into this concept of integrating brand and culture and talked about the external representation of the institutional brand and why it should matter to students. They voiced

how important it is that institutions provide the best experience possible to students in connecting them with a positive culture. Participant 15 built on this and expressed the significance of authenticity when marketing externally to students about the institution's brand and culture. "Authenticity is the most important thing in the world," and students look for congruence in marketing materials so that the story the institution is telling is "authentic and real and in line with the culture." Participant 2 shared why alignment was so essential in the minds of institutional constituents and how brand and culture are externally presented:

> The brand is a perception in the mind of our constituents. It we claim something and put it on paper, put it on a banner, put it on our messaging, and it doesn't reflect the lived experiences of our students, faculty or staff, the misalignment creates controversy, and it creates negative feelings toward the university.

Participant 2 further shared why it is so imperative to speak to students in a manner that connects brand and culture and to "think about the culture that we want to shape, the vision that we want to shape for the university, and the experience we want them (students) to have." Participants expressed the concept that brand and culture is so much more than one may think it is. Participant 9 voiced that the institutional "brand is more than just our colors. It's more than just our logo. It's about who we are and how we express who we are."

Another area on which participants focused when sharing their lived experiences around aligning brand and culture with institutional values centered on an institutional community that demonstrates brand and culture. Participant 1 expressed how "culture is about the community" and the "engagement is about the face to face and the relationship"

that is experienced at the institution. Participant 10 went deeper into the community and connected the mission of the institution, voicing that "when there is clear connection to the mission, then it seems to reinforce the brand very well." Furthermore, Participant 10 explained that when it is clear that the mission, values, or vision of the institution are tied directly to a campaign, then it reinforces the brand. This concept of reinforcing the brand was also echoed by Participant 14, who shared how important it is to ensure that their institution has a really strong brand that that says "who they are." Participant 14 further illustrated that branding an institution with that alignment is "more deep rooted…kind of like an iceberg." Participant 15 added to that concept:

> I don't think you just achieve alignment. I think your people are your brand. I can create visuals all day, but our people are ultimately our brand, and so our brand needs to meet our culture. But when people don't behave like our culture, they can ruin the brand.

Participant 13 shared the importance of marketing directors achieving their goals by helping make a cultural shift. Participant 14 also expressed the importance of having the president of the institution lead that alignment, stating, "Our president is like the culture driver of those cultural values" of the institution. Participant 15 also echoed the importance of modeling the brand and culture of the institution, expressing:

> We need to model it. We need to model the language...how we speak to each other. That's actually the part of the brand this is tied to our culture. I try my best to model what I expect people to do, to let them know they're a part of the brand.

Participant 2 built on the importance of modeling and talked about the experience that needs to be created when it comes to "creating brand loyalty through a unified brand

experience;" in order to create that experience, an institution must build a "brand community that is unified by mission and motivated by a shared vision." Moreover, Participant 2 voiced the need for an institution to grow and change because "brand is expressed through that growth and culture is shaped through that growth."

The last area that focused on the lived experiences around aligning brand and culture with institutional values addressed how impactful marketing directors are as leaders of this alignment. Participant 12 expressed how marketing leaders are "stewards" of the area of brand and culture "helping to develop it, oversee it, and grow and nurture it." Participant 9 also felt they were "not just a leader, but a steward." They further shared that there is something about stewardship that is "extra, a little bit more, a higher expectation." Participant 13 reinforced this responsibility of stewardship, expressing that "we are here to elevate the brand and the reputation of the college…and carry out the mission of the college." This responsibility of leaders of alignment was also shared with Participant 14 sharing that they are there to help the institutional community understand the brand but also how the brand acts and interacts and that brand and culture are aligned. Participant 15 shared how there is an energy around the stewardship that marketing directors feel and how important it is to have passion when leading brand and culture alignment because that passion is what helps drive them to be stewards of the brand. "We're fueled by passion. And it's true that people care so much…I think that is one of the best ways an internal department can really live the brand, by fighting for it." Participant 9 also echoed this passion about brand and culture alignment, sharing, "I'm telling you, I live and breathe this stuff. I love it so much."

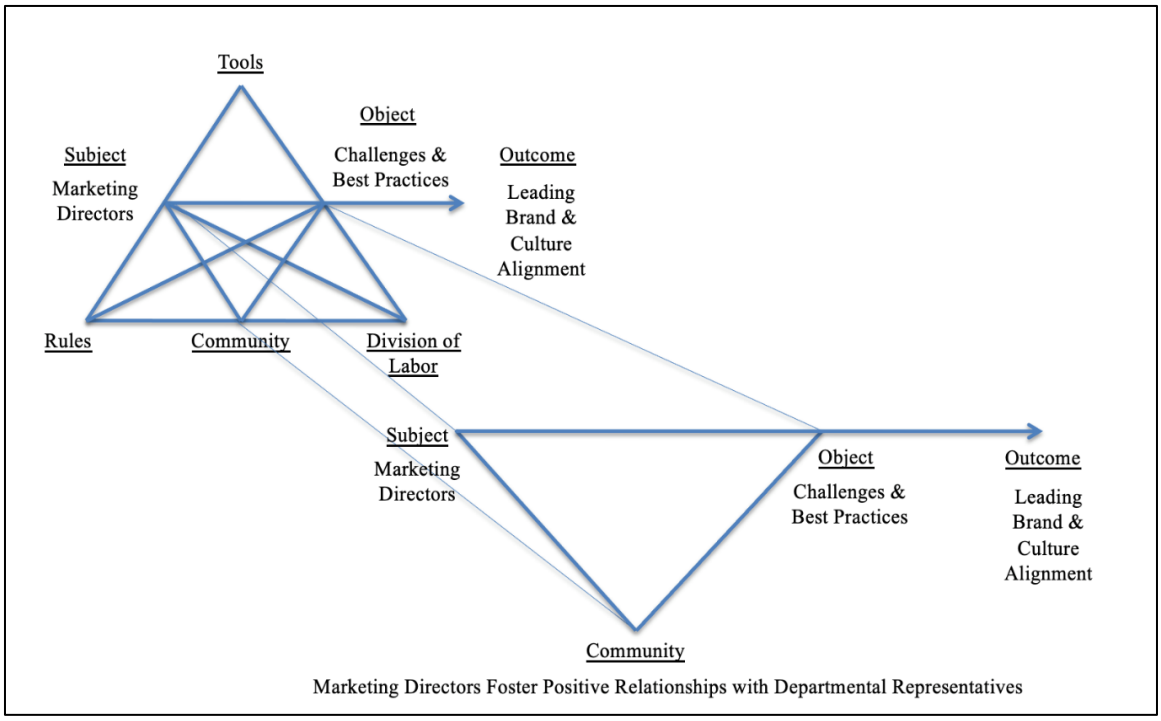
These accounts provide a deeper description around the best practices of rules regarding marketing directors aligning brand and culture to institutional values. The AT activity system also demonstrates the best practices between marketing directors and aligning brand and culture to institutional values while leading brand and culture alignment.

AT community. The second most common best practice participants shared was marketing directors fostering positive relationships with departmental representatives. This best practice was shared by all participants, and the central AT domain considered for this theme was community. As demonstrated visually in the model, one can see the role of community in the context of this study (see Figure 23). The impact of community is demonstrated visually in this model. The participants shared the significance of nurturing positive relationships with the institutional community and shared their experiences regarding the effective ways it works for them and their marketing department.

Marketing directors foster positive relationships with departmental representatives. This theme occurred in the data in 220 instances across all 15 participants. The two main areas underscored that pertained to marketing directors fostering positive relationships with departmental representatives focused on the importance of partnership and trust, as well as relationships with departments like admissions and advancement. The significance of building strong partnerships and trust that support the relational component of leading brand and culture alignment was something Participant 1 captured as engagement and the face-to-face relationships as well

as how people can partner together when it comes to a project, campaign or even on social media.

Figure 23: A Visual Representation Showing Community as Marketing Directors Fostering Positive Relationships With Departmental Representatives in the AT System.



Participant 10 appreciated when there was trust built with departments and they would reach out to marketing for help, sharing appreciation for leaders of departments who supported and really understood how important marketing and branding is. Additionally, Participant 12 reinforced partnerships as well as collaboration, because coming together and working collaboratively allow them to meet institutional goals. Participant 13 has appreciated the receptive nature of departments and the "culture shift" that put marketing in a place "where there's recognition in being experts in what we do." The relational component of building brand and culture alignment is also strong when

working with faculty. Participant 14 shared that reaching out to a faculty member to grab coffee to learn more about what they do gave them the opportunity to cultivate a relationship with the faculty member and it "humanized me as a person and as a marketer." Participant 14 reiterated that relationship management is just as important as sharing data and reporting, so everyone is on the same page working toward the same goals.

Participant 7 believes it the job of marketing directors was to come alongside whoever they are collaborating with and support the goals of the department. This concept of helping and coming alongside people in fostering relationships was shared by Participant 8 who expressed how important it was to help people, further sharing, "I think a big part of my role has been fostering relations with the faculty and trying to build those relationships and create liaisons." The diversity around the relationships is also something Participant 7 enjoys; "one of the most gratifying things working at a university is the diversity of people that you can come across."

The relationship with both the admissions and advancement departments was very prevalent among the participants when it came to underscoring the importance of fostering positive relationships to lead brand and culture alignment. Participant 13 shared that having a strong relationship with admissions allowed marketing stronger buy-in with the institution and that active collaboration with admissions also allowed them to make the stronger partnerships with advancement. Participant 1 echoed this, sharing that the "liaison between marketing and admissions is a big thing" and they appreciated their strong partnership between admissions and marketing. Furthermore, Participant 13 expressed that the admissions relationship is a great example of how they can partner

together, and the work that they have done with admissions and advancement "provided clarity to the Board of Trustees regarding the value that marketing brings to the institution." Participant 14 felt it was essential that marketing and admissions were on the same page and aiming toward the same goals, whereas Participant 15 felt the culture of admissions was "aligned very well to the brand" and were "phenomenal" because of the support they provided to marketing. Working together toward the same goal was also shared by Participant 11, who voiced that great partnership allows them to accomplish their goals because everyone is working to achieve them together. Participant 8 also expressed their strong relationships with both admissions and advancement, and how they have been a champion for brand and culture alignment and education around the brand of the institution.

These accounts provide a clear description around the best practices of community regarding marketing directors fostering positive relationships with departmental representatives. The AT activity system also demonstrates the best practices for marketing directors and fostering positive relationships with departmental representatives while leading brand and culture alignment.

AT rules. The third most common best practice participants shared was marketing directors conducting brand guideline education training. This best practice was shared by 14 participants, and the central AT domain considered for this theme was rules. The participants shared the necessity of strong brand guideline training to effectively communicate and educate the institutional community on the brand to successfully lead brand and culture alignment.

Conducting brand guideline education training. This theme occurred in the data in 135 instances across 14 participants. Two central areas that helped marketing directors conduct brand training and education were scheduled training sessions for the institutional community and consistent education with the institutional community to connect brand and culture. Many participants shared about their brand councils or brand committees that consisted not only of just marketing team members, but also faculty and staff representatives to gain buy in and assist with educating the community on the brand. Participant 9 shared their experience of a brand task force of over 30 people that evolved from the institution's original brand relaunch into higher level team that supports marketing initiatives and creates a collaborative environment to talk about brand and culture. Participant 13 shared their experience with a brand committee that regularly conducts workshops to educates the institutional community on areas like the website, guidelines, fonts, colors, and photography. Participant 13 expressed that the workshops give them and the team an opportunity to be "recognized for the expertise that you bring" but also "empowering" the community to understand and use components of the brand.

Participant 12 also implemented a brand and communication audit with the institutional community that assessed the various logos, implementation of the brand, etc., before gathering the information to share the results of the audit to the community. This information allowed the community to see the various ways the brand was being used that diminished the actual brand and culture they wanted to convey. Once the community saw the examples "they began to buy into to the idea of a cohesive brand structure," which allowed the education with the updated assets to be successful. Participant 14 also implemented a similar strategy, conducting 40 meetings for the brand

rollout to individualize the education for each department. The goals of these meetings were not just about the logo, but to educate the community on the "visual, verbal, behavioral essence of the organization." Participant 2 also shared the importance of having an integrated marketing group, where marketing can educate the group and members can ask questions and become stronger advocates of and educators on the brand. These groups in the community would meet to "communicate priorities, and work through shared problems and projects," whereas Participant 1 also conducted "lunch and learns" so the community could sign up for refresher courses on the brand.

The second area identified as a best practice to help marketing directors conduct brand training and education was providing consistent education to support brand and culture alignment. Participant 12 expressed that the main goal is conducting brand guideline training, because it is marketing's job to "elevate the brand and the reputation of the college." Furthermore, marketing is there to support the community by providing the "tools and resources to be empowered and carry forth the brand" of the institution. Participant 14 also shared this concept around supporting the community and helping the community understand it is not "just what we look like and sound like, but how the brand acts and interacts." Assisting in training new employees to help educate them on the brand guidelines was another best practice shared by Participant 15. Giving new employees resources about the brand helps build that brand consistency from the start. Participant 1 reinforced this by expressing the importance of creating a connection to the brand so the community responds to it and has an emotional feeling about it, along with a sense of what the institution really stands for. The aim of the education is also to establish

the goal of the institutional brand. Participant 9 shared, “The whole goal behind that is you’re only as good as your brand.”

These accounts provide a strong description around the best practices of rules regarding marketing directors conducting brand guideline training for brand education. The AT activity system also demonstrates the best practice of marketing directors conducting brand guideline training while leading brand and culture alignment.

AT division of labor. The fourth most common best practice participants shared was marketing directors establishing a marketing agency/centralized department with authority. This best practice was shared by 14 participants, and the central AT domain considered for this theme was division of labor. As demonstrated visually in the model, one can see the role of division of labor in the context of this study (see Figure 24). The participants shared the necessity of having a centralized or marketing agency structure that could encompass a marketing department that includes teams like: account management, digital media and website, public affairs and communications, creative and graphic design, and market research. This structure would provide the institution with the experts needed to effectively lead brand and culture alignment.

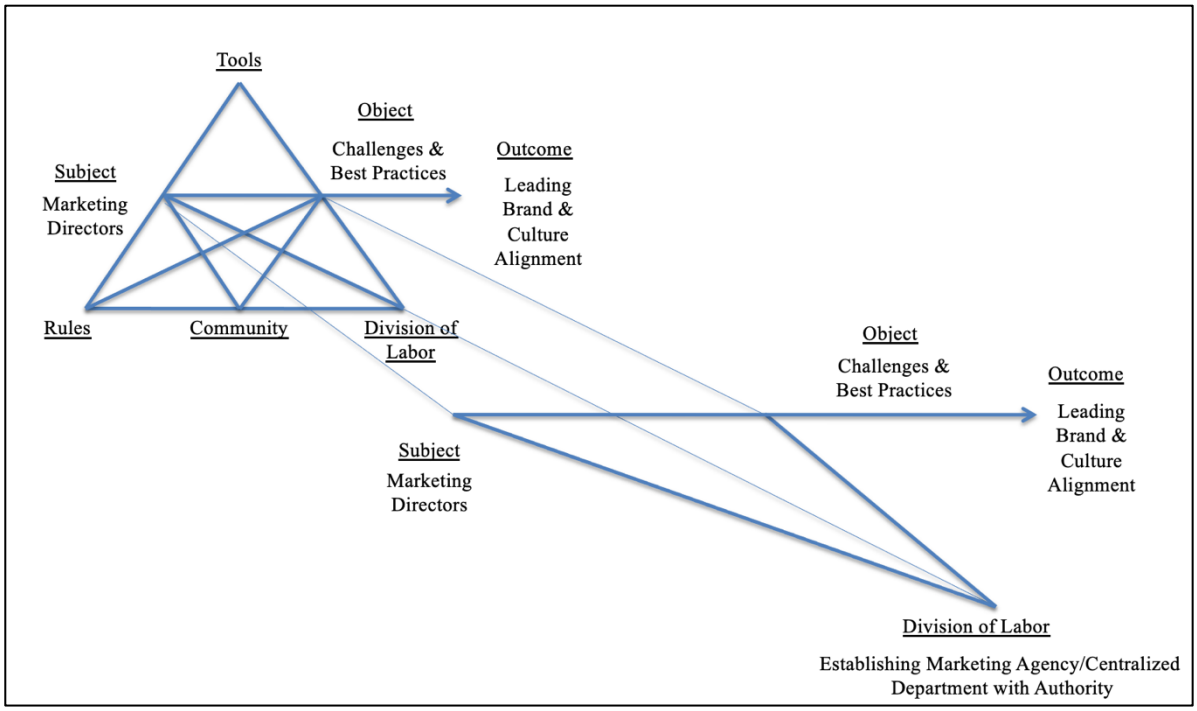
***Establishing marketing agency/centralized department with authority*.** This theme occurred in the data in 119 instances across 14 participants. Participants shared how marketing agency/centralized departments are there to collaborate and help all departments across the institution. Participant 3 shared, “It’s been helpful for alignment that you have a bigger sense of team, and we’re all on the same team trying to make this all work.” They further shared that leading brand and culture alignment with a centralized team that has the authority to make decisions is essential to carrying out the brand of the

institution. Participants were supportive of the formation of a centralized or marketing agency model and identified this type of structure as a best practice to meet the brand and culture goals of their institutions. Participant 12 described the centralized/marketing agency model as a "value center, not a cost center." This description signifies that even though marketing departments do not generate revenue in a conventional manner like admissions or advancement, marketing/centralized departments do bring value because of the expertise within the department, which helps the institution meet their goals, even when the department may not be growing as the same level as other departments. They shared how their department was "achieving more, even though the resources were not growing proportionately to enrollment growth or the overall budget growth" and they were doing more with a lower percentage of the resources." While this is happening, departments like admissions could still meet their enrollment goals by working with the marketing/centralized department. This focus of the marketing/centralized agency model bringing value to the institution was a primary focus that was an effective best practice to leading brand and culture alignment.

Participants 2, 3, 6, 9, 11, 12, 13, and 14 all shared the various positions they have in their agency model that supported the institution's branding initiatives. Additionally, hiring in-house experts provides a level of proficiency that benefits the overall institutional goals. Positions like project managers, social media strategists, creative directors, graphic designers, web directors, and account executive positions were common and provided support to their institutions. Many participants joked that they were considered the "brand police" or "logo cops" at their institution, expressing that it is

really is more about being a full-service creative department that is there for the institution and the community.

Figure 24: A Visual Representation Showing Division of Labor as Establishing a Marketing Agency/Centralized Department With Authority in the AT System



These accounts provide a valuable description around the best practices of division of labor regarding marketing directors establishing a marketing agency or centralized department with authority. The AT activity system also demonstrates the best practice of marketing directors establishing a marketing agency/centralized department while leading brand and culture alignment.

AT community. The fifth most common best practice participants shared was the importance of students feeling connected to the institutional brand. This best practice was shared by 15 participants, and the central AT domain considered for this theme was

community. The participants shared the necessity of connecting students to the brand and culture of the institution to successfully lead brand and culture alignment.

Students feel connected to institutional brand and culture. This theme occurred in the data in 104 instances across all 15 participants. There were two primary areas of significance of students' connecting to institutional brand and culture. The first area was the importance of authenticity. Participants expressed that the brand and culture of the institution should authentically represent the student experience. Participant 1 shared that private non-profit institutions focus on a student culture of community and relationships on campus. Participant 12 went a step further, sharing that growth was accomplished at their institution by clearly identifying the students they were looking at in a manner that aligned with the brand values of the institution. Caring about the student experience is top of mind, especially with Participant 14, who shared that giving these students the best experience possible is a top priority, as well as getting the right students in the right programs. Participant 15 echoed this concept, elaborating that "brand is actually a whole school brand" so students "align their brand to their focus area," further adding the impact that authenticity has on students, sharing how students feel when something is inauthentic, and it is essential to align the institutional brand with "who we are and who our students expect us to be." Participant 2 reiterated the importance of authenticity, sharing that if students view something at the institution as inauthentic, they see there is a misalignment and that can ruin the brand perception of the institution. Participant 2 added that institutions must figure out a way to speak to students in a way that "manages expectations around brand and culture," ensuring that is reflective of the experience they are looking for.

The next area shared was the concept of clearly marketing to Generation Z that connects this new generation to the institution's brand and culture. Participants expressed that Millennials are not the target audience anymore, it is Generation Z. Participant 2 expressed that at times institutional leadership will reference the incoming students at millennials, which causes a disconnect of who the student body really is. Participant 2 further shared that Millennials are now entering their 40s and no longer represent the current college generation; they may be entering grad school, but in terms of who is being marketed to, it is Gen Z. Participant 2 continued to share that what Gen Z is looking for is different from the expectation of Millennials and institutional leadership and institutions need to understand that to market to them appropriately. Participant 8 added to that, sharing how imperative it is to market to Gen Z in a manner that speaks to them, especially on social media. Participant 8 further expressed that TikTok and video content are integral to that generation to connect with them and demonstrate the culture they will experience at the institution.

These accounts provide an effective description regarding the best practices of community regarding marketing directors connecting brand and culture for students. The AT activity system also demonstrates the best practice of marketing directors connecting brand and culture with students while leading brand and culture alignment.

AT division of labor. The sixth most common best practice participants shared was the importance of top-down support for brand and culture alignment. This best practice was shared by 15 participants, and the central AT domain considered for this theme was division of labor. The participants shared the impact of having top-down

support from the board, president, and administration to successfully lead brand and culture alignment.

Top-down support for brand and culture alignment. This theme occurred in the data in 92 instances across all 15 participants. All participants voiced how imperative it was to have support from the board, president, and administration to effectively lead brand and culture alignment. Participant 8 shared that the board and the president's support provided the motivation to launch the rebrand and their institution. Having that support from the beginning allowed the participant and their team to make brand and culture shift needed for a successful rebranding campaign. Participants 1, 4, 3, and 11 all shared how powerful it is to have top-down support, with Participant 10 adding that having that support "seems to carry more weight. It's got more gravitas."

Participant 11 shared a personal experience, expressing what it was like to have presidential and administrative support for years, and then losing that backing once a new president was put into place. Witnessing the dismantling of their marketing department due to lack of support was extremely difficult. It took years to build trust across the institution and construct a team of marketing and branding experts only to see it taken away and relationships decline with new leadership. This experience only reinforced to Participant 11 why this top-down support is so imperative to successful brand and culture alignment, and what it an impact it makes with marketing directors and their team.

Participant 12 described a positive experience: being brought in by the president to lead a marketing team for their institution with the backing and board support needed to be successful:

> One of the first things we did was to get Board approval, not just the university administration. But when the administration agreed to the brand identity, we took it to the Board of Trustees for board adoption. And were successful in gaining that, once we had board adoption approval, I mean, that's all the authority, you need to enforce it within the institution among the employees.

Furthermore, Participant 12 shared that the president also modeled the behavior he wanted to see with the new brand and saw the brand as something bigger by bringing a stability that has value and purpose that will endure in the future. Participant 2 also voiced the significance of having a close "feedback loop" with the president's office on a regular basis. This communication helps effectively shape the voice and the goals of the institution in a way that provides affirmation with senior leadership, and they are all moving in the same direction.

These stories provide a strong description around the best practices of division of labor regarding top-down support for marketing directors leading brand and culture alignment. The AT activity system also demonstrates the best practice of marketing directors requiring top-down support while leading brand and culture alignment.

AT division of labor. The seventh most common best practice participants shared was the importance of having a marketing voice at the leadership table to effectively lead brand and culture alignment. This best practice was shared by 14 participants, and the central AT domain considered for this theme was division of labor.

***Marketing voice at leadership table*.** This theme occurred in the data in 68 instances across all 14 participants. Two areas of focus were the impact of having a vice president at the leadership table who represents marketing and an opportunity for

marketing directors to present to administration and the board on an annual or quarterly basis. Participant 8 was grateful to have a vice president for marketing and communications who had a great vision, was hands on, and sat at the senior level on administration. Participant 13 also expressed appreciation for a vice president who has the full support of the president, and felt that voice legitimized the work that marketing did and gave them recognition as an expert in their field.

The next area was providing marketing directors the opportunity to present marketing samples, metrics, and data to the board and administration. Participants appreciated the vice president's support, but also wanted their own leadership opportunity to share the work they are doing with their team. Participant 13 enjoys meeting twice a year with the board and administrative team to have an opportunity to come together and share the work they are carrying out with their team. They can demonstrate metrics, show increases in social media followers and video views, as well as share increases in enrollment numbers and bring validation to what they do. Participant 14 also conducts similar meetings, scheduling quarterly meetings with the board and administration as well as bi-annual marketing strategy meetings with faculty chairs and departments. These meetings give marketing directors and their teams the chance to get on the "same page about how we're measuring success and defining it."

These highlights provide a description of the best practices of division of labor regarding marketing directors having a voice at the leadership table to lead brand and culture alignment. The AT activity system also demonstrates the best practice of marketing directors having a voice at the leadership table while leading brand and culture alignment.

Unexpected Themes

The objective of this study was to use the AT framework to identify and describe the lived experiences of the challenges and best practices of marketing directors leading brand and culture alignment and their private non-profit higher education institutions. There were three unexpected patterns of unsolicited responses that surfaced from participants. These instances were included as unexpected findings and were categorized into three themes (see Table 6).

Table 6: Unexpected Themes, Sources, Frequencies, and Corresponding AT Domains

Themes for Unexpected Findings	Source	Frequency	AT Domain
Biblical Beliefs Drive Brand & Culture at Faith-Based Institutions	8	46	Rules
Reinforcement of Athletics Brand that Support Institutional Brand	7	29	Rules
Brand Guidelines Part of HR Onboarding Process	8	22	Rules

Each of the three themes was categorized using the AT framework to understand how marketing directors utilized them leading brand and culture alignment. All three findings were categorized under the AT domain of rules. The first unexpected finding was *biblical beliefs drive brand and culture at faith-based institutions*. The second was *the athletics brand reinforces the institutional brand*, and the third was *incorporating brand guidelines into human resources onboarding process*. This section will discuss participants' accounts in the context of the three unexpected findings.

AT rules. Over half of the participants shared that some of the rules they utilized leading brand and culture alignment included connecting their biblical beliefs to help drive brand and culture alignment at their faith-based institution. Participants expressed

how the faith-based mission and values of the institution were intrinsic to how they approached living out the brand and culture.

Biblical beliefs drive brand and culture at faith-based institutions. This theme appeared in the data 46 times across eight participant interviews. There were both positive and negative connotations to the biblical beliefs driving brand and culture at faith-based institutions. Participant 14 expressed the challenge of launching a rebrand when the faith-based values of the institution are about humility. The struggle to brand the institution well while still aligning to the faith-based values of the institution is a delicate balance; Participant 14 shared that it is about helping the institutional community understand that it is how the brand acts and interacts within the faith-based setting and ensuring that that culture and brand are aligned with faith. Participant 2 also expressed that the academic culture is built through a lens of faith principles, but then the difficulty arises in how that is reconciled with such a diverse population of faculty, staff, and students who may come from different faith backgrounds. Participant 2 shared that "it's not only that faith drives culture, but it's what the value system of those in leadership positions decide are going to be the values expressed through faith." Participant 2 added that approaching the connection of faith and values allows them to communicate their culture in a way that it can be heard and respected.

Participant 3 also shared that in rebranding their institution, the faith and biblical history was a very important part of the process in how they approached everything from school colors to fonts to naming conventions across the institution. Everything in the rebrand connected to the faith of the institution to live out the brand and culture in an authentic way; "it all ties back to our faith, that is our litmus test, that's our true north."

This integration was also tied into the admissions process to ensure the students they are marketing to connect to the faith-based brand and culture of the institution. Participant 12 expressed similar views on the integration of faith and values and expressed that faith and values must be incorporated in the brand and culture of the institution. Moreover, sharing there is a sense of stewardship of the institutional values to effectively lead that brand and culture alignment in a way that honors the faith of the institution.

AT rules. The next unexpected finding was how the athletics brand reinforces the overall institutional brand. Participants shared how the collaboration with athletics supported the athletics brand and helped connect students, faculty, and staff to understanding the importance of the overall institutional brand when leading brand and culture alignment.

Reinforcement of athletics brand that supports institutional brand. This theme appeared in the data 29 times across seven participant interviews. Participants shared that the primary way to connect brand and culture with athletics was working collaboratively with athletics to help reinforce the athletics brand in conjunction with the overall institutional brand. This partnership was key to alignment. Participant 9 shared their experience of partnering with athletics to encourage students to wear their institution's colors to games. Historically, prior to their rebrand, students did not wear the institution's colors, but the partnership with athletics and working with marketing to inspire students to show support over time created an institutional culture that consistently wears school colors to the games. Participant 9 further added that the participant ran into the president of the institution at a local shopping center where the president was searching specifically for institution's colors to wear to the athletics events to reinforce the brand. Participant 1

also expressed appreciation of athletics partnering with marketing on their application to NCAA status. Athletics reached out to marketing to work with them on the application and make sure it was a good move for the institution from a brand perspective. Participant 11 also expressed how the athletics representation of the institutional brand is significant because it is another way the institutional name is out there publicly, so the partnership with athletics and their understanding of how it fits into the overall brand and culture of the institution was important to them.

AT rules. The last unexpected finding was how brand guidelines should be a part of the human resources (HR) onboarding process for new employees. Participants shared how helpful it would be to introduce the institutional brand as a first touch point for a new employee. This introduction and educating a new employee on the importance of how the brand and culture would bring a stronger connection to the community when leading brand and culture alignment.

Brand guidelines part of HR onboarding process. This theme appeared in the data 22 times across eight participant interviews. Participants shared how impactful it would be to have a stronger partnership with HR when it came to onboarding new employees to educate them on the brand and culture of the institution and let them know that marketing was a resource to them. Participant 1 shared that this type of education for a new employee could include an information piece with brand guidelines and the mission and culture of the institution as way to connect them to the brand and culture of the institution from the start. Participant 14 took this point a step further in regard to HR recruitment, sharing that the expectations around brand and culture alignment should be "baked into the way they write the job," to ensure the institution is attracting the right

employees who would connect to the brand and culture. Participant 6 expressed their desire to partner with HR more on an onboarding plan so faculty and staff would be better informed and educated on what the brand is.

Summary

This chapter opened with a restatement of the purpose statement, two research questions, research methods and data collection procedures, population, and sample. This chapter described the two key areas from which the challenges and best practices themes were categorized. The unexpected findings were also discussed. Challenges and best practices were organized using the AT framework to demonstrate how these interconnected variables impact participants' experiences leading brand and culture alignment.

Participants shared themes that included six challenges and seven best practices. Finally, three unexpected findings arose from participant interviews (See Table 7).

Table 7: Themes, Sources, Frequencies, and Corresponding AT Domains

Theme Area	Themes for Best Practices	Source	Frequency	AT Domain
Best Practices	Aligning Brand & Culture with Institutional Values	15	247	Rules
	Marketing Directors Foster Positive Relationships with Departmental Representatives	15	220	Community
	Conducting Brand Guideline Education Training	14	135	Rules
	Establishing Marketing Agency/Centralized Department with Authority	14	119	DOL
	Students Feel Connected to Institutional Brand & Culture	15	104	Community
	Top Down Support for Brand & Culture Alignment	15	92	DOL
	Marketing Voice at Leadership Table	14	68	DOL
Challenges	A Lack of Strong Stakeholder Relationships Distort Brand & Culture Alignment	15	156	DOL
	Resistance to Utilizing Brand Guidelines	15	113	Rules
	A Lack of Adoption of Brand Toolkit Materials	14	106	Tools
	A Need for Adequate Marketing Staff & Resources	13	92	DOL
	Faculty are Disconnected from the Goals of	12	82	Community

Theme Area	Themes for Best Practices	Source	Frequency	AT Domain
Unexpected Findings	Marketing Directors			
	A Lack of Adequate Brand Education for Institutional Community	13	79	Rules
	Brand Guidelines Part of HR Onboarding Process	8	22	Rules
	Biblical Beliefs Drive Brand & Culture at Faith-Based Institutions	8	46	Rules
	Reinforcement of Athletics Brand that Support Institutional Brand	7	29	Rules

Although the goal of the study had no intention to discuss these unexpected themes, they were integrated in this chapter to display the variety of challenges and best practices the participants experience leading brand and culture alignment. Following the coding and identification of each theme, the researcher organized them using the four AT domains of rules, community, division of labor, or tools. The consistency of the AT structure described the marketing directors as the subjects. The activity system of the subjects and the challenges and best practices that are taken as the object, and leading brand and culture alignment as the outcome.

Chapter V presents a summary of the study. This includes presenting major findings, unexpected findings, and conclusions. The implications for action will also be examined. Lastly, this final chapter includes recommendations for future research, concluding remarks, and reflections.

CHAPTER V: FINDINGS, CONCLUSIONS, AND RECOMMENDATIONS

Overview

The purpose of this phenomenological study was to explore the challenges and best practices of marketing directors leading brand and culture alignment at private non-profit higher education institutions. The study used the AT framework to examine the research questions. A sample of 15 marketing directors at private non-profit higher education institutions was included in this study. Participants experienced and shared their challenges and best practices leading brand and culture alignment through quantitative interviews. This chapter includes a summary of the study's purpose as well as the two research questions. Chapter V also presents major findings, unexpected findings, conclusions, and implications for action. The chapter ends with recommendations for further research, concluding remarks, and reflections.

Purpose Statement

The purpose of this phenomenological study was to identify and describe, through the lens of AT, the challenges and best practices of marketing directors at private, non-profit higher education institutions on how they lead brand and culture alignment.

Research Questions

1. Through the lens of AT, what are the challenges marketing directors at private, non-profit higher education institutions experience as they lead brand and culture alignment?
2. Through the lens of AT, what are the best practices marketing directors at private, non-profit higher education institutions recommend to lead brand and culture alignment?

Activity Theory

AT is a descriptive framework that objectively explains the various tensions and interconnected domains that can make up activity systems. AT helps clarify complex systems and is not a predictive model. Although AT was not originally intended to explore best practices, given that the model provides a system to explain the complexities of interconnected domains, it was applied in this study to explore the lived experiences and complex nature around marketing directors leading brand and culture alignment.

Two research questions were included in the study to explore this study. By answering the research questions, it provides a comprehensive description of the lived experiences of marketing directors and the challenges and best practices leading brand and culture alignment. Additionally, the research questions demonstrate how the marketing directors relate to the specific challenges and best practices as it connects to each AT domain. The study was organized in this way to address the overall phenomenon of the study. The AT illustrations shown subsequently (Figures 25 and 26) present both the challenges and best practices using the AT activity model.

Figure 25: A Visual Representation Showing the Challenges in the AT System

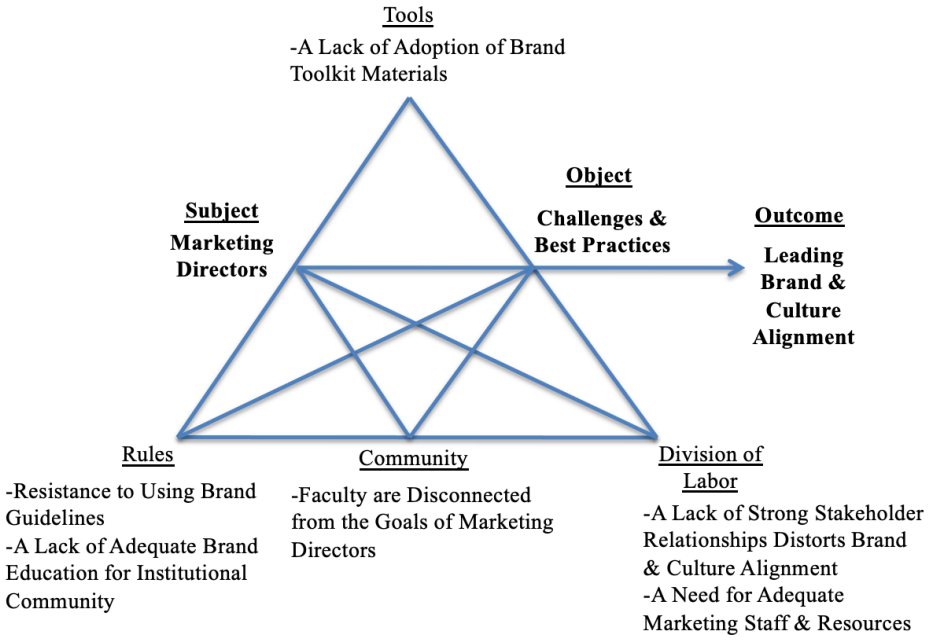
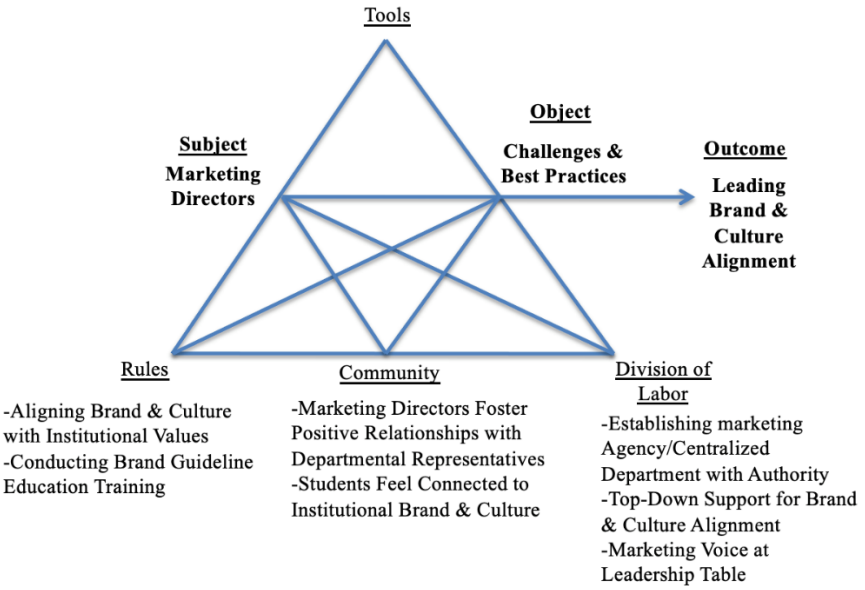


Figure 26: A Visual Representation Showing the Best Practices in the AT System



Major Findings

The data revealed seven major findings and two unexpected findings. The nine findings are as follows:

Major finding 1: Marketing directors are successful at leading brand and culture alignment when the institutional brand and culture aligns with institutional values. One of the major findings that appeared in 15 of 15 (100%) participant responses was how essential it was that the institutional brand and culture align with the institutional values. When the brand and culture do not align with the values of the institution, it creates an inauthentic representation of the institution that diminishes the brand and creates a disconnect with the culture. This misalignment causes tension in attracting and recruiting the right students for the institution, especially with newest generation of students, Gen Z. Research shows that this segment of the population expects authenticity in marketing with authors K. C. Williams and Page (2011) sharing how authenticity and realness are areas that should drive marketing to this technologically-savvy, global, and diverse generation. Successfully establishing institutional values and reinforcing those values in branded work such as printed collateral, websites, and social media are essential to visually and accurately representing the culture that the institution wants to portray. Participants shared that marketing directors are brand stewards who take great pride in aligning brand and culture to the institutional values and work intentionally to connect and educate the institutional community. In the AT framework, this finding would be categorized as a rule, which aligns clearly with what the participants shared.

Major finding 2: Marketing directors were successful at leading brand and culture alignment when positive relationships were formed with institutional departments. Another major finding from the data that appeared in 15 of 15 (100%) participant responses was the importance of building positive relationships with institutional departments to effectively lead brand and culture alignment. Participants shared that building strong partnerships and trust across the institution helps build those positive relationships, which supports collaboration. Participants expressed that marketing directors must be proactive in cultivating cross-departmental relationships at their institutions to encourage better brand education in the community as well as a collaborative culture while supporting the goals of the institution. Participants shared that departments like admissions and advancement benefit from positive relationships with marketing directors and their departments, because when marketing directors understand the goals of those departments, the partnership creates an alliance that can strengthen the brand while meeting the objectives of their campaign or recruiting strategies. Relationships are currency in higher education and cultivating those relationships helps build the trust and support needed to successfully partner together on brand and culture alignment. In the AT framework, this finding would be categorized as community, which aligns clearly with what the participants shared.

Major finding 3: Brand and culture support from institutional leadership gives credibility and a voice to marketing directors. Another major finding from the data that appeared in 15 of 15 (100%) participant responses was the significance of marketing directors gaining support from institutional leadership to give credibility and a voice to their work to effectively lead brand and culture alignment. Participants expressed

how crucial it is that marketing directors are provided support from the board, president, and administration to effectively lead brand and culture alignment because that backing provides the credibility and authority needed to successfully lead the brand of the institution. Flannery (2021) echoed the need for leadership support, sharing that "leaders who steward strong brands make these choices about priorities deliberately so that the brand strategy is intentionally reinforced" (p. 96). Furthermore, providing marketing directors a voice at the leadership table is also imperative. Participants expressed how marketing directors need a president who can not only clearly articulate the work of the marketing director and the marketing team but also be the advocate for the department to educate their leadership team. Moreover, participants also shared how marketing directors should be provided the opportunity to share team achievements, celebrate successful campaigns, and connect with their organization's leadership team at least twice a year. This is important for both brand education and professional growth. In the AT framework, this finding would be categorized as division of labor, which aligns clearly with what the participants shared.

Major finding 4: Brand and culture leadership from a centralized/agency structured marketing department helps marketing directors lead brand and culture alignment. Another major finding from the data that appeared in 14 of 15 (93%) participant responses was the impact of brand guidance that comes from a centralized or agency structured marketing department, which helps marketing directors lead brand and culture alignment. Participants shared the importance of a centralized marketing structure where there are well-defined teams of account management, creative, digital, web, and public relations and communications, which provide the institution the specialized

expertise to meet institutional goals while maintaining brand integrity and authentic representation of institutional culture. Furthermore, one participant expressed the significance of viewing marketing departments as value centers to the institution. At times, institutions may not see the importance of marketing departments because they are not cost centers driving revenue for the institution. However, viewing marketing departments as a center that brings value to the institution demonstrates a structure that brings strong impact to the institution because of the vast departments they serve and with which they partner. In the AT framework, this finding would be categorized as division of labor, which aligns clearly with what the participants shared.

Major finding 5: Poor institutional relationships with faculty and staff cause disconnect of marketing goals and prevent adequate practice of brand and culture alignment. Another major finding from the data that appeared in 15 of 15 (100%) participant responses was how poor institutional relationships with faculty and staff cause a disconnect of marketing goals and prevent adequate practice of brand and culture alignment. Participants expressed how poor relationships cause a disconnect with brand and culture at the institution. This is further exacerbated when institutional departments are siloed and relationships are not formed, and departments may create their own branded materials, logos, and representations of the institution in a way that does not align with the values, brand, and culture of the institution. Participants expressed disappointment regarding poor relationships with faculty and staff, further expressing the lack of respect they have encountered working with faculty. These areas cause a disconnect of the goals of not only the marketing directors, but also the institution as a whole, which creates tension and an inability to collaborate together for the advancement

of the institution. In the AT framework, this finding would be categorized as division of labor, which aligns clearly with what the participants shared.

Major finding 6: Lack of marketing staff and resources hinders marketing directors ability to lead brand and culture alignment. Another major finding from the data that appeared in 13 of 15 (86%) participant responses was the lack of marketing staff and resources hindering marketing directors' ability to lead brand and culture alignment. Marketing directors and their teams provide service to the entire institution. Participants voiced that insufficient resources inhibit marketing directors and their teams from meeting the goals of the institution, especially with admissions and advancement. At times the marketing staff was not equitable to the staff or admissions or was not privy to the goals of advancement, which made it challenging to meet their needs while maintaining the brand integrity of the institution. Furthermore, lack of staff and resources cause extreme burnout among the marketing team, further exacerbating the burden on the already small or short-staffed departments. In the AT framework, this finding would be categorized as division of labor, which aligns clearly with what the participants shared.

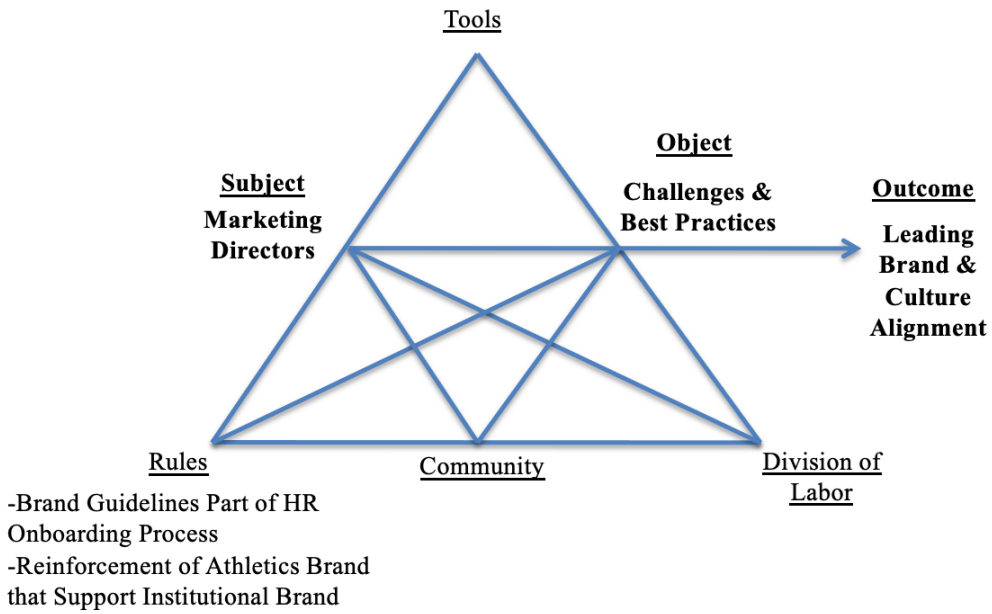
Major finding 7: Lack of brand education and adoption inhibits successful brand and culture practice. The last major finding from the data that appeared in 13 of 15 (86%) participant responses was the lack of brand education and adoption, inhibiting successful brand and culture practice. Participants shared that in order for institutions to properly adopt brand guidelines, there must be consistent and collaborative education around the brand. This education will allow the institutional community to understand the importance of the brand and how it connects with the culture, supporting stronger buy-in for adoption. Without this process, the institutional community lacks the understanding of

what the brand is, how to collaborate with the marketing director and their team, and why it is important to adopt the brand to help support the brand integrity and culture of institution. In the AT framework, this finding would be categorized as rules, which aligns clearly with what the participants shared.

Unexpected Findings

The researcher found two unexpected findings in the data. The unexpected findings include the importance of branding training partnership with marketing directors and HR, as well as cultivating strong relationships with the athletics department to help reinforce a consistent brand presence. The AT illustration shown in Figure 27 presents the two unexpected findings using the AT activity model. The two unexpected findings are as follows:

Figure 27: A Visual Representation Showing the Unexpected Findings in the AT System



Unexpected finding 1: Human resources is a key partner with marketing directors and their teams in brand and culture alignment. The first unexpected finding that appeared in 8 out of 15 (53%) participant responses was the significance of partnering with HR to help educate the community on brand and culture alignment. Participants expressed the importance of connecting with HR and new employees at the start of their employment with the institution to appropriately educate new employees on the brand and share the resources that the marketing department can provide to them. Additionally, participants shared the importance of partnering with HR to create job descriptions to effectively communicate the brand and culture of the institution and attract employees who connect to the culture to further build alignment in the community. In the AT framework, this finding would be categorized as rules, which aligns clearly with what the participants shared.

Unexpected finding 2: Athletics branding helps reinforce the institutional brand and culture when unified with marketing. The second unexpected finding that appeared in seven out of 15 (46%) participant responses was the importance of athletics branding to help reinforce the institutional brand and culture when there is a unified partnership between marketing directors and their marketing team. Participants expressed the importance of partnering with the athletics department to educate them on the institutional brand as a way to help them brand athletics to ensure proper brand and culture alignment. Additionally, participants added that because athletics is one of the strongest ways to publicly display the brand, it is essential that there is a partnership with marketing to create a consistent message, both verbally and visually. This way, athletics is not seen as separate from the institutional brand, but a part of the larger brand. In the

AT framework, this finding would be categorized as rules, which aligns clearly with what the participants shared.

Conclusions

Based on the findings of this study, the researcher is offering a series of conclusions to provide a deeper understanding into the challenges and best practices of marketing directors leading brand and culture alignment.

Conclusion 1: Institutions must be authentic in modeling core values and brand principles to achieve brand and culture alignment. One of the findings of this study was that institutions are successful at leading brand and culture alignment when the institutional brand and culture authentically align with institutional values. Based on this finding, it can be concluded that in order to lead brand and culture alignment, the institution must have clearly identified, supported, and communicated core values and brand standards. These values and brand principles should be modeled by all institutional stakeholders to create an authentic brand experience at the institution. The importance of institutions focusing on core values can also be seen in the work of Simões (2019), who shared that "the mission statement and core values set the strategic direction" for the institution (p. 46). This strategic direction must be used to establish brand and culture alignment. Moreover, Nguyen et al. (2019) argued that institutions that actively interact and nurture organizational culture with shared values helps support faculty and staff to better connect with their institution, which in turn makes them more motivated in their work, ultimately benefiting the institution and society as a result of what the institution provides. Given the findings of this study and the prior research that highlights the importance of aligning organizational culture and values, the institutional leaders and

stakeholders must authentically embrace and model the core values to achieve brand and culture alignment.

Conclusion 2: Marketing directors must build trusted and collaborative relationships as they lead best practice to build brand and culture alignment. Another finding of this study was that marketing directors were successful at leading brand and culture alignment when positive relationships were formed with institutional departments because poor institutional relationships prevented adequate practice of brand and culture alignment. Based on this finding, it can be concluded that marketing directors must be intentional about building trusted and collaborative relationships as they are the leading best practice in building brand and culture alignment. Simões (2019) shared that there are various stakeholders at an institution that can include faculty, staff, and students for example, and these constituents have varying interest in the institution, which calls for not only a holistic understanding of what the institution stands for, but also what the brand stands for. To build this comprehensive understanding, productive and positive relationships need to be nurtured in a manner where expertise is respected by all stakeholders. Each person brings a talent and experience to the table that can contribute to a more collaborative conversation around the brand and build a culture of strong institutional partnerships. People are the brand, which means the people need to believe and live out the culture of the institution. This authenticity and alignment is where the power lies.

Conclusion 3: Institutional leadership must have strategic partnerships with marketing directors to build stronger alliances to strengthen brand and culture alignment. A third finding of this study was that brand and culture support from

institutional leadership give credibility and a voice to marketing directors. Based on this finding, it can be concluded that for marketing directors and their teams to lead brand and culture alignment, marketing directors must have strategic business partnerships with leadership that support marketing and branding efforts. Building solid alliances is imperative to strengthening brand and culture alignment. These partnerships would include having a vice president or chief marketing officer at the leadership table that supports the marketing director and their teams, and also an avenue where leadership provides marketing directors opportunities to share accomplishments with the board and institutional leadership. Marketing directors must be viewed as value added experts to educate leadership on branding, but also ensure the marketing goals properly support institutional goals. Brand leadership is central to brand building at institutions (Nguyen et al., 2019). Partnerships with marketing directors and their teams and providing opportunities to have a voice at the leadership table and how their work aligns with the institutional goals are imperative to building brand and culture alignment.

Conclusion 4: Institutions must support marketing directors and in-house experts to strengthen an institution's brand and culture. A fourth finding of this study was that brand and culture leadership from a centralized/agency structured marketing department help marketing directors lead brand and culture alignment. Based on this finding, it can be concluded that for marketing directors to lead brand and culture alignment, marketing directors and their teams must have in-house experts to strengthen an institution's brand and culture. Institutions value external insight and research from outside firms; however, valuing their own in-house experts who have extensive experience in areas like account management, communications, creative, design, social

and digital, is important to recognize and appreciate. Such teams strengthen an institution's brand and culture because in-house teams live out the brand every day.

Conclusion 5: Marketing must forge relationships with faculty and staff to build rapport and share expertise that supports brand and culture alignment. The fifth finding of this study focused on the challenge of poor institutional relationships with faculty and staff that cause a disconnect of marketing goals and prevent adequate practice of brand and culture alignment. Based on this finding, it can be concluded that marketing directors must forge positive and intentional relationships with faculty and staff to build rapport and share expertise that supports brand and culture alignment. This necessitates open and possibly difficult conversations around respect, valuing expertise from both perspectives, and how to work together and bridge the gap in a productive manner to benefit the institution. The hierarchy culture of higher education should be challenged as well. Faculty are highly educated groups who have specialized expertise that the institution, students, and society require to grow and evolve. However, marketing leaders, directors and their teams are also highly educated individuals with advanced degrees, doctorates, and extensive industry experience, which brings value to the institution in a manner that will help promote the good work of the faculty, help attract the right students to the programs, and build brand recognition for the institution. This interdependence and symbiotic relationship are necessary for the advancement of higher education. Marketing deserves the respect and validation for the value they bring to their institutions. Furthermore, the culture around faculty and the relationship between marketing must change to meet the future needs of higher education.

Conclusion 6: Institutional leadership must recognize insufficient marketing staff and resources is a detriment to the institution. The sixth finding of this study centered on how a lack of marketing staff and resources hinders marketing directors' ability to lead brand and culture alignment. Based on this finding, it can be concluded that institutional leadership must recognize that insufficient marketing staff and resources are a detriment to the institution. Institutional leadership must recognize that lack of marketing staff and resources cause an inability to support all institutional departments, which can lead to burnout, job departure, and loss of institutional knowledge, all of which affect effective brand and culture alignment.

Flannery (2021) discussed the "strategic value" (p. 56) that is built when it comes to brand equity, enrollment, and overall institutional engagement: all factors that should be considered when decided on the capacity of a marketing department. Furthermore, Flannery went on to share,

> The investment in staff who perform marketing and communication functions as part of their roles in colleges and schools as well as in other departments or divisions may make the total investment in marketing staff large, but diffuse. If there are no clear structures and policies in place, as well as relationships, to encourage integration of the effort and collaboration in investment and goal-setting, the organizational structure will not be optimized for effectiveness. (p. 52)

Gone are the days when marketing teams are just seen as the brand or logo police. These are highly strategic and well-educated teams of experts who bring value and are partners with the institutional community to help elevate the brand, integrate the mission and values, and support the goals of the institution.

Conclusion 7: Marketing directors must adopt policies and best practices to provide regular and consistent education to the institutional community. The seventh finding of this study was how the lack of brand education and adoption inhibits successful brand and culture practice. Based on this finding, it can be concluded that marketing directors and their teams must adopt policies and best practices to provide regular and consistent education to empower institutional communities to learn and apply brand and culture alignment. Marketing directors should regularly conduct brand training sessions that not only educate the community on accurate use of the institutional logo, fonts, website, and general brand practice guidelines, but also why the brand provides value to the institution and how to integrate the brand with the institutional culture. Moreover, brand training sessions allow marketing directors and their teams to build stronger strategic relationships across campus, which allows them to be seen as in-house experts while offering the institutional community ways to gain better education on the brand. Sujchaphong and Sujchaphong (2019) supported the significance of brand training, sharing that institutions need to ensure the community understands the brand's values and how to incorporate those brand values into their work activities in order to support the brand of the institution. Training and education on the brand help build a more valuable integration of brand and culture within the community.

Conclusion 8: Institutions must be intentional and encourage HR to work with marketing directors to educate new employees on brand and culture. The eighth finding of this study was the significance of HR being a key partner with marketing directors and their teams in brand and culture alignment. Based on this finding, it can be concluded that institutions must be intentional and encourage HR to work

closely with marketing directors and their teams to educate new employees on brand and culture. Brand education must have a prominent role in both onboarding and continue with ongoing personnel training. The importance of brand training and partnership with HR to help educate the institutional community on brand and culture alignment is central. Nguyen et al. (2019) expressed how imperative it is that institutional stakeholders need to collaborate to deliver a "synergistic student (and employer) experience" (p. 258). This experience should start on the first day an employee starts at the institution to deliver that experience and set the standard from day one. Furthermore, Yohn (2018) shared that marketing and HR should collaborate because the relationship between these two departments is so crucial. It is not enough to only have marketing directors work with HR departments to provide effective brand resources to new employees and meet with new employees to educate them on the brand to integrate brand and culture from the start of their employment. It is about partnering with HR to help educate on the brand, but also assist in building out the culture of the institution in a manner that creates strong alignment. Early touch points to meet with HR to talk about the job description process as well as incorporate marketing in orientation would connect the importance of brand and culture and help establish a foundation in departmental relationships.

Conclusion 9: Marketing directors must maintain frequent communication with the athletics department to ensure the institutional brand and athletics brand are properly aligned. The ninth finding of this study was how athletics branding helps reinforce the institutional brand and culture when unified with marketing. Based on this finding, it can be concluded that marketing directors must maintain frequent communication with the athletics department to ensure the institutional brand and

athletics brand are properly aligned. Athletics can sometimes be viewed as its own separate brand from the institution. However, this is why it is significant to intentionally collaborate with athletics to build a stronger and more consistent brand presence for the institution. The athletics brand is very public, and at times, is the first representation of the brand that a student sees or is the connecting touch point for alumni to their alma mater. This creates a strong impact and emotion around how the brand makes someone feel. A stronger partnership between athletics and marketing will help maintain brand integrity and ensure the institution is properly exhibiting brand and culture alignment.

Implications for Action

Considering the findings and conclusions of the study, the researcher recommends the following implications for action. The recommendations are directed to various stakeholders in non-profit higher education institutions.

Implication 1A: Marketing directors must partner with institutional leadership, faculty and staff to establish and model core values to attract top talent and students. Based on the conclusion that institutions must be authentic in modeling core values and brand principles to achieve brand and culture alignment, it is recommended that marketing directors partner with institutional leadership, faculty, and staff to establish and model core values to effectively market institutional values, brand, and culture. This alignment could attract top talent with faculty and staff as well as students who connect with the brand and culture at the institution. Marketing directors and their teams should work with faculty and staff to clearly identify the values of the institution and articulate them in a manner that builds an institutional brand and emulates a culture that aligns with the institution's values. The "core values become vital for

market positioning and tying up the institution into a coherent and cohesive self" (Simões, 2019, p. 52). Institutional leadership should incorporate biannual internal conventions to encourage and steward the importance of actively partnering with marketing, faculty, and staff to ensure the institutional values are being branded sufficiently both internally and externally for proper alignment. These conventions will help build relationships, educate, and create a solid foundation of authenticity that will help attract the right students, employees and external constituents who connect with the institutional brand and culture. This action by the institution and leadership would support stronger institutional relationships as well as provide regular opportunities to establish and model institutional values to create a positive culture and work with marketing directors and their team to effectively align that culture with the brand of the institution to create that fusion necessary to drive brand and culture.

Implication 1B: Admissions and marketing must employ annual planning meetings to fully integrate institutional values, brand, and culture. Based on the conclusion that institutions must be authentic in modeling core values and brand principles to achieve brand and culture alignment, it is recommended that marketing directors work with admissions and schedule an annual planning meeting to map out the enrollment goals for that year and what recruitment materials are needed in order to ensure the brand and culture of the institution is authentically represented to potential students. Additionally, regular monthly meetings with admissions are also imperative to ensure that goals are being achieved. Lastly, reporting out these metrics quarterly to institutional leadership is key to educate leadership on achievements and communicate necessary adjustments to continue growth and alignment. Marketing directors should

have an active role with their admissions teams to align brand and culture in all recruiting materials to ensure the most authentic representation of the institution. Flannery (2021) shared that as strategic integrated marketing evolves, leaders are recognizing that branding is a "enterprise-wide function" (p. 45) and that marketing directly influences areas like enrollment. A best practice in the research indicated that admissions teams that work collaboratively with marketing directors and their team to share their enrollment goals, are stronger at meeting enrollment initiatives. The branded materials that marketing creates with admissions is the first touch point of the institution to a potential student. Ensuring that the brand and culture are represented authentically to attract the students that admissions is seeking to enroll requires that strategic partnership with marketing directors and admissions.

Implication 2: Marketing directors create ongoing opportunities and relationship management plans to cultivate healthy institutional relationships to build a strong institutional culture that supports the brand. Based on the conclusion that marketing directors must build trusted and collaborative relationships because they are the leading best practice to build brand and culture alignment, it is recommended that marketing directors create ongoing opportunities and relationship management plans to cultivate healthy institutional relationships. The plan is meant to build out partnerships in an intentional manner to have open dialogue around the importance of strategy, people, systems, processes, and structure needed to strategically build a strong institutional culture that supports the brand. Accountability is also essential because it is about moving from a transactional to a transformational experience. Relationship plans that have agreed upon expectations, as well as strong feedback loops and the opportunity to provide

feedback and encourage dialogue are crucial to sustaining the plan. Marketing directors should be proactive in cultivating cross-departmental relationships at their institutions by developing and fostering a relationship management plan that educates and trains the community on brand and culture. The plan would build in accountability for departments to work collaboratively with marketing directors and their team on best practices around branding and foster a positive working environment at the institution. This positive work culture would help reinforce the brand and build a community that supports and understands the brand.

Implication 3: Institutional leadership partners with marketing directors to develop biannual opportunities to build partnerships, share successes, and educate on brand and culture. Based on the conclusion that institutional leadership must have strategic partnerships with marketing directors to build solid alliances to strengthen brand and culture alignment, it is recommended that institutional leadership partner with marketing directors to develop biannual opportunities to build partnerships, share successes, and educate leadership and board members on brand and culture. Marketing directors must be given the opportunity to regularly report out on areas like metrics, awards, and data to demonstrate value and educate leadership. These opportunities to share successes will allow for a better understanding of the work of marketing directors and their teams. This representation at the leadership table will give them a voice and provide the opportunity to educate the board, the president, and institutional leadership on marketing goals and projects to ensure that institutional goals match the marketing goals. Providing this education from the top down will create stronger support when leadership

understands what brand and culture mean and the impact of alignment on the institutional community.

Implication 4: Institutions consider annual brand and culture symposiums led by centralized marketing teams to support in-house expertise. Based on the conclusion that institutions must support marketing directors and in-house experts to strengthen an institution's brand and culture, it is recommended that institutions consider annual brand and culture symposiums that are led by the centralized marketing teams to show support of the in-house experts in the marketing department. Institutional leadership must place value in centralized marketing teams to support and demonstrate that they understand why an agency structure model is needed to build healthy brand and culture. An annual symposium, for which leadership is a strong advocate by building out budget and presenting it in partnership with marketing, would allow marketing directors and their teams a platform to educate the institutional community on brand and culture. Institutions who are serious about building a strong marketing mentality should bring the marketing function in-house to provide a formal department that supports the institution (Flannery, 2021). This structure provides the right expertise to educate the community on brand and culture and establish a stronger integration of value to the institution.

Implication 5: Institutional leadership creates task force to review faculty, staff and marketing relationships to reflect a culture of respect. Based on the conclusion that marketing must forge relationships with faculty and staff to build rapport and share expertise that supports brand and culture alignment, it is recommended that institutional leadership create a task force to review faculty, staff, and marketing relationships to reflect a culture of respect. Institutional leadership must support and

require positive interdependent relationships between faculty and staff to support mutual respect to build brand and culture alignment. It is often said in jest how much individuals in higher education loves committees. However, a task force that clearly identifies the roles of faculty, staff, and marketing, as well as the responsibilities of each member to foster a culture of respect where both parties can learn from each other, will help bridge the gap and frustration that can occur between faculty, staff, and marketing. Providing the opportunity of a trusted space where each party can clearly articulate their work, goals, and concerns can assist in overcoming the disconnect that occurs in higher education.

Faculty members are powerful entities who are the core of the institution. Staff are the remarkable individuals who ensure that core business of the institution is running smoothly. Neither can function without the other. Therefore, collaborative relationships are critical. Marketing directors are meant to dive into that core and communicate what that center of the institution means in order to build the brand and culture of the institution for students, faculty, and staff. Building collaborative and strategic positive relationships is imperative in order to create brand and culture alignment. There must be opportunities for faculty and staff relationships to be fostered in order to improve collaboration. This way there is a balance of the expertise from the marketing director, faculty member, or staff member. Providing these opportunities would allow marketing directors and their teams to build the respect they deserve for their work and knowledge they have around marketing, branding, and culture, and educate faculty and staff on how their initiatives fit into the overall institutional objectives. This mutual respect is necessary to work with each other because each person brings value to the table. Providing strategic opportunities where there can be open dialogue and positive

relationship building will allow for a stronger understanding of each area of expertise. Creating these opportunities will help build the brand and culture of the institution.

Implication 6: Board of trustees and institutional leadership prioritizes funding and provides marketing directors and their teams with the proper support and resources. Based on the conclusion that institutional leadership must recognize insufficient marketing staff and resources as a detriment to the institution, it is recommended that institutional leadership, along with the support of the board of trustees, prioritize funding and provide marketing directors and their teams with the proper support and resources needed to effectively lead brand and culture alignment. Institutional leadership must recognize the value of marketing directors and their teams and allocate funding to provide proper support and resources. Institutions will ensure that programs are properly staffed with the right faculty members, advancement has the right fundraising platform to track donor support, and admissions has the proper enrollment management system to support student enrollment. These examples are all essential components of the institution. Institutional leadership must approach marketing staff and resources in the same manner since marketing directors and their teams support the entire community. To sufficiently serve the various internal constituents well, proper staffing and resources prioritized in the same manner as other crucial institutional areas is required for effective brand and culture alignment.

Implication 7: Institutions employ brand ambassador programs to encourage brand training to learn and apply best practices and become better educated on brand and culture alignment. Based on the conclusion that marketing directors and their teams must adopt policies and best practices to provide regular and consistent

education to empower institutional communities to learn and apply brand and culture alignment, it is recommended that institutions employ brand ambassador programs of brand training and education to learn and apply best practices. Individuals in the program can achieve certificates and have stronger partnerships with marketing directors and their teams, collaborating with them to support brand and culture and create experts on the brand in departments across the institution. Certificates could be earned over the course of 6 months through monthly training offerings by the marketing teams. Through attendance and hours, certificates would be provided, and the brand ambassador would also be invited to help partner with marketing on future events and meetings to support a positive relational culture. This will allow the institutional community to become better educated on brand and culture alignment. Regular training sessions like lunch and learns, brand refresher courses, and how to cultivate a culture that aligns with institutional values, for example, help support an institutional community that is well-versed in the brand, which would reinforce strong brand and culture alignment. A brand ambassador program that is supported by the institution gives stronger credibility and support regarding the importance of brand and culture alignment and intentionally engaging with the institutional community. The way the brand is communicated and described inside the organization is crucial to brand education (Simões, 2019). Marketing directors and their teams are valued trusted partners across the institution. They are there to visually and verbally present the brand to external and internal audiences. The internal audience and education reflect the connection needed to build the brand from the inside out.

Implication 8: Marketing directors and their teams must be a part of the onboarding process to provide brand and culture education leading to stronger

brand and culture integration over time. Based on the conclusion that institutions must be intentional and encourage HR to work with marketing directors to educate new employees on brand and culture, it is recommended that marketing directors and their teams be a part of the onboarding process to provide support and brand and culture education leading to stronger brand and culture integration over time. Marketing directors and their teams can develop and maintain up to date brand guideline materials and educational presentations to provide resources to educate new employees on the brand to actively integrate brand and culture. Marketing directors should work directly with hiring managers and educate HR on the importance of integrating brand and culture to foster better working relationships and create a culture of employees who support and live out the brand. "People decisions are perhaps the most visible way leaders can build their culture and align it with the company's brand identity" (Yohn, 2018, p. 68). Equipping employees with resources like marketing materials, templates, logos, and clear information on how to access brand guidelines, how to use them, and to whom to reach out with questions, is imperative to support both brand and culture, as well as build strong relationships between employees and marketing. In addition to resources, it is also crucial that brand and culture education is connected with employee performance and review. This connection will ensure that employees are living out the core values of an institution, as well as modeling and supporting those core values to build a healthy institutional culture. Brand is not just a logo, and culture is not just a buzz word. It is about aligning the values of an institution, having a strong brand that supports that culture, and strategically choosing a community that embodies that identity.

Implication 9: Athletics and marketing must have quarterly collaborative strategic planning sessions that supports brand cohesion efforts and helps strengthen the external brand with students, alumni and institutional supporters. Based on the conclusion that marketing directors must maintain frequent communication with the athletics department to ensure the institutional brand and athletics brand are properly aligned, it is recommended that athletics and marketing have quarterly collaborative planning meetings together that support cohesive brand efforts and helps strengthen the external brand with students, alumni and institutional supporters. Marketing directors should meet quarterly with the athletics department representatives to talk about their goals and how they can partner together to ensure that the institutional brand and athletics brand is properly aligned in a manner that connects with the culture of the institution. Athletics programs provide the opportunity for an institution to visually promote the brand, to support proper brand and culture alignment, nurturing strong relationships with athletics is essential to support the institutional brand with stakeholders of the brand ranging from potential and current students, alumni and donors. This range of constituents makes it essential to connect the overall institutional brand with the athletics brand for stronger alignment.

Recommendations for Future Research

This study explored the lived experiences of marketing directors and the challenges and best practices they encounter leading brand and culture alignment at their private non-profit higher education institution. Based on the findings of this study, the researcher recommends further research in the following areas:

Recommendation 1: Replicate this study at public institutions to see if the data in this study is shared in other sectors of higher education. This study was limited to private non-profit higher education institutions. Therefore, it is recommended that this study be replicated in public institutions to see if the data that is presented in this study is shared in other section of higher education. This recommendation is necessary to understand how marketing directors lead brand and culture alignment in various higher education settings.

Recommendation 2: Replicate the study to identify the challenges and best practices for vice president of marketing or chief marketing officers. This study was limited to marketing directors. Therefore, it is recommended that this study be replicated to identify challenges and best practices for higher level marketing leaders like Vice Presidents of Marketing or Chief Marketing Officers. This recommendation is necessary to determine if the challenges and best practices higher level marketing leaders' experiences are similar to marketing directors. These findings could impact the ways all marketing leaders lead brand and culture alignment and provide even stronger comprehensive data for higher education institutions.

Recommendation 3: Conduct a quantitative study considering the specific areas of challenges and best practices of marketing directors leading brand and culture alignment. It would be useful to conduct a quantitative study which considers the ranking of challenges and best practices that marketing directors experience leading brand and culture alignment. This recommendation is necessary to understand the extent to which marketing directors lead brand and culture alignment and would provide even richer data to connect with the qualitative research.

Recommendation 4: Launch an internal brand and culture committee of marketing and institutional leaders. One of the major findings from this study was the significance of establishing positive relationships and brand education and training. A brand and culture association of both marketing leaders and institutional leaders could support brand and culture initiatives while providing broader education and collaboration across the institution. This recommendation is necessary to support positive institutional relationships, provide regular education on the brand and foster a healthy institutional culture.

Recommendation 5: Conduct a phenomenological study of exemplar institutions that effectively aligned their brand and culture. This study was limited to private non-profit higher education institutions in California by means of criterion sampling. . Therefore, it would be recommended to conduct a phenomenological study on institutions in the United States by interviewing exemplar marketing leaders who have successfully turned around their institution by aligning brand and culture. This recommendation is necessary to learn more about the significance and brand and culture alignment and how institutions effectively aligned their brand and culture to meet the goals of their institution.

Recommendation 6: Conduct a phenomenological study on the lived experiences of students on best practices and challenges of brand and culture alignment. This study was limited to marketing directors, it is recommended that this study be replicated to identify the lived experiences of students on their experience of the challenges and best practices regarding brand and culture alignment. This recommendation is necessary to gain feedback from students so it could be connected

with marketing director research to validate best practices and challenges and also learn where to pivot in order to effectively market to students and their expectations around their college experience.

Recommendation 7: Conduct a phenomenological study on the lived experiences of faculty on best practices and challenges of brand and culture alignment. This study was limited to marketing directors. Therefore, it is recommended that this study be replicated to identify the lived experiences of faculty on their experience of the challenges and best practices regarding brand and culture alignment. This recommendation is necessary to gain stronger insight from faculty so it could be connected with marketing director research to validate or dispute best practices and challenges and also provide deeper insight into building better relationships between marketing and faculty.

Concluding Remarks and Reflections

I began my career in higher education marketing in November 2006. Over the years, I have had the privilege of working with some of the most incredibly bright, creative, and driven, colleagues who hold a true passion for the work they do every day. As one of the participants shared so perfectly, marketing directors are "fueled by passion." That is exactly how I describe my love for marketing, branding and culture in higher education. I have a true passion for the work I do and the amazing work of all marketing directors at their institutions.

Marketing directors have the unique opportunity to touch all aspects of their institution, serving in a roll that connects with each department across campus. Marketing directors are the communication directors, lead brand ambassadors, culture drivers,

department mediators, customer service specialists, and project and design saviors to many people who work with them. Marketing directors are brought into conversations to help organize, strategize, and collaborate. Their important work is often seen only in their service, packaged with a nicely designed magazine, a cool website, or a digital ad seen on Instagram. But below the surface are individuals with a passion for their institution, for the people they work with and serve, the brand they champion, and a culture that they live out in the work they do every day.

My hope for this study was to give a voice to the amazing and special work that marketing directors lead at their institutions. At times, it can go unnoticed, unappreciated, undervalued, and taken for granted. I hope this study allows marketing directors and all marketing leaders to feel seen, heard and appreciated. I also hope it allows for better strategic conversations among board members, presidents, administration, and faculty. We are all on the same team, driving toward the same goals of the institution. The more we can respect each other's expertise, collaborate, and learn from each other, the more we can undoubtedly create relationships that will positively affect the institution.

Talking to each of these participants reinforced why this work is so special. Marketing directors truly do have an impact on their institutions because they drive the brand and culture in the way that no other department can emulate. Those in higher education know that the future may be challenging, but the more we can all partner together and recognize the work we can do by building brand value and an institutional culture where students, faculty, staff, donors and supporters want to be a part of, the future may be a little brighter than expected.

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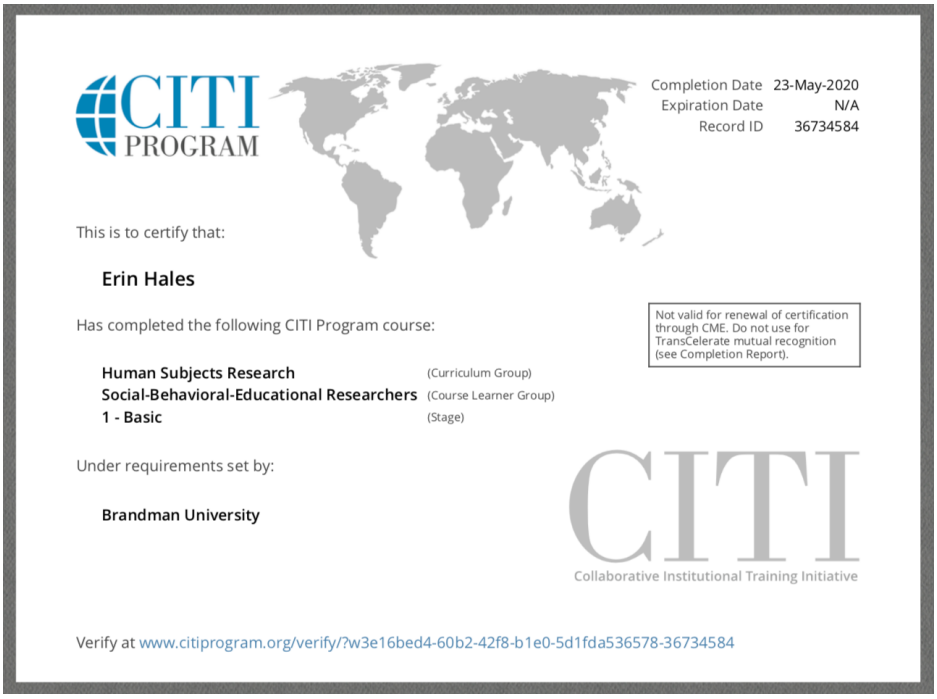
APPENDICES

Appendix A: CITI Certificate



CITI PROGRAM

Completion Date 23-May-2020
Expiration Date N/A
Record ID 36734584

This is to certify that:

Erin Hales

Has completed the following CITI Program course:

Not valid for renewal of certification through CME. Do not use for TransCelerate mutual recognition (see Completion Report).

Human Subjects Research (Curriculum Group)
Social-Behavioral-Educational Researchers (Course Learner Group)
1 - Basic (Stage)

Under requirements set by:

Brandman University

CITI
Collaborative Institutional Training Initiative

Verify at www.citiprogram.org/verify/?w3e16bed4-60b2-42f8-b1e0-5d1fda536578-36734584

Appendix B: Research Participant's Bill of Rights

UMASS GLOBAL
A nonprofit affiliate of the University of Massachusetts

UMASS GLOBAL UNIVERSITY INSTITUTIONAL REVIEW BOARD

Research Participant's Bill of Rights

Any person who is requested to consent to participate as a subject in an experiment, or who is requested to consent on behalf of another, has the following rights:

1. To be told what the study is attempting to discover.
2. To be told what will happen in the study and whether any of the procedures, drugs or devices are different from what would be used in standard practice.
3. To be told about the risks, side effects or discomforts of the things that may happen to him/her.
4. To be told if he/she can expect any benefit from participating and, if so, what the benefits might be.
5. To be told what other choices he/she has and how they may be better or worse than being in the study.
6. To be allowed to ask any questions concerning the study both before agreeing to be involved and during the course of the study.
7. To be told what sort of medical treatment is available if any complications arise.
8. To refuse to participate at all before or after the study is started without any adverse effects.
9. To receive a copy of the signed and dated consent form.
10. To be free of pressures when considering whether he/she wishes to agree to be in the study.

If at any time you have questions regarding a research study, you should ask the researchers to answer them. You also may contact the UMASS GLOBAL Institutional Review Board, which is concerned with the protection of volunteers in research projects. The UMass Global Institutional Review Board may be contacted either by telephoning the Office of Academic Affairs at (949) 341-9937 or by writing to the Vice Chancellor of Academic Affairs, UMASS GLOBAL, 16355 Laguna Canyon Road, Irvine, CA, 92618.

Appendix C: Invitation to Participate

Date: Month Day, 2021
Dear Potential Study Participant:

You are invited to participate in a qualitative study about The Challenges and Best Practices of Marketing Directors Leading Brand and Culture Alignment at their Private Non-Profit Higher Education Institution.

My name is Erin Hales, and I am a doctoral candidate at UMass Global University conducting research toward my dissertation for my Education Doctorate in Organizational Leadership. You were selected for this study because you have great expertise leading brand and cultural alignment at a private non-profit higher education institution and I believe the larger field will benefit from your insights.

PURPOSE: The purpose of my study is to learn from marketing directors, like you, about the challenges and best practices you have experienced as you lead brand and culture alignment at your private non-profit higher education institution.

BACKGROUND QUESTIONS: If you decide to participate in the study, the following background questions will need to be answered prior to the interview:

1. Please share with me a little about your professional background.
2. How long have you been a Marketing Director?
3. Have you held the title of Marketing Director at a Private Non-Profit Higher Education Institution in the last three years?
4. How long have you been at your current Private Non-Profit Higher Education Institution?
5. Are you involved in a professional association like the American Marketing Association (AMA) or Public Relations Society of America (PRSA)?
6. Are you the primary person responsible for branding at your Private Non-Profit Higher Education Institution?

PROCEDURES: If you decide to participate in the study, a one hour Zoom interview will be conducted at a time most convenient for you. You will be asked a series of questions about your challenges and recommended best practices leading brand and culture alignment at your private non-profit higher education institution. You will receive a copy of the interview protocol, which will include the questions that you will be asked, as well as definitions and examples. I will also be asking for artifacts, such as Admissions Viewbooks, mission statements, core values of the institution, and brand guidelines to name a few, that may help support your experience. With your approval, the interview session will be recorded and transcribed. In the rare occurrence I am processing interview data, I may reach out for clarifying questions.

RISKS, INCONVENIENCES, AND DISCOMFORTS: There are minimal risks associated with this study. There may be an inconvenience to participate in the interview, however, providing you with the interview questions before hand will help to make the process more efficient.

POTENTIAL BENEFITS: Your expertise will provide valuable awareness into common challenges and best practices that marketing directors encounter. This will help others leading brand and culture alignment at private non-profit higher education institutions.

ANONYMITY: I want to assure you that the interview will be completely confidential. Records of information and any personal information you provide will be kept confidential. For example, your name nor your institution's name will be attached to any notes or records for the interview. It will not be possible to identify you as the person who provided information for the study. Furthermore, all information will be secured in digital files accessible only by the researcher. At any time during the interview, you are free to decline answering specific questions or stop the interview and withdraw from the study without consequence.

SCHEDULING: Please view the Google Doc of potential interview times and select a date if you are willing to participate. If none of these dates work for you, please reach out to me and I am more than happy to schedule a time that works best for you.

You are encouraged to ask questions, at any time, that will help you understand how this study will be performed and/or how it will affect you. You may contact me by email at [redacted] or my cell phone at [redacted]

You can also contact my Dissertation Chair, Dr. Cheryl Marie Osborne by email at [redacted]

I truly appreciate you taking time to consider participating in my study. Please contact me if you are interested.

With Gratitude,

Erin Hales, MBA

Doctoral Candidate
UMass Global in Organizational Leadership

Appendix D: Informed Consent

INFORMATION ABOUT: Brand and Culture Fusion: How Marketing Directors Lead Brand and Culture Alignment at Private Non-Profit Higher Education Institutions

RESPONSIBLE RESEARCHER: Erin Hales Ed.D. Candidate

PURPOSE OF STUDY: You are being asked to participate in a research study conducted by Erin Hales, Ed.D. Candidate, a doctoral student from the School of Education at UMass Global University, part of the University of Massachusetts System. The purpose of this phenomenological study is to identify and describe, through the lens of Activity Theory, the challenges and recommended best practices of Marketing Directors at private, non-profit higher education institutions on how they lead brand and culture alignment.

PARTICIPATION: Your participation in this study is voluntary and will include an interview with the identified researcher. The interview will last approximately an hour and will be scheduled at a time of your convenience. The meeting will be conducted via Zoom video meeting. The interview questions will pertain to your perceptions and your responses will be confidential. Each participant will have an identifying code and names and institutions will not be used in data analysis. The results of this study will be used for scholarly purposes only.

I understand that:

a) The researcher will protect my confidentiality by keeping the identifying codes safe-guarded in a password protected digital file to which the researcher has sole access.
b) My participation in this research study is voluntary and involves minimal risk. I may decide to not participate in the study and can withdraw at any time. I can also choose not to answer specific questions during the interview. Also, the researcher may stop the study at any time.
c) I understand the interview will be recorded via Zoom Meeting. Zoom was the chosen platform because the researcher has full access to all features, which allows participants, even those without a Zoom subscription, to fully participate and use all the platforms features (i.e., video, audio, recording, chat, backgrounds etc...). More importantly, Zoom offers a transcription option of the recording, which the researcher will use to collect and analyze data.
d) The recordings will be available only to the researcher and the professional transcriptionist. The recordings will be used to capture the interview dialogue and to ensure accuracy of the information collected during the interview. All information will be identifier-redacted, and confidentiality will be maintained. All paper copy documents (i.e., data, consents) will be securely uploaded into digital files. Upon completion of the study, all recordings will be deleted, and paper copy

documents will be confidentially shredded. All digitally stored documents will be securely stored for three years then fully deleted.

e) In the rare occurrence the researcher is processing interview data and has questions, the researcher may reach out for clarifying questions.
f) If I have any questions or concerns regarding the research, I should contact Erin [redacted]obal.edu or by [redacted].2836 or Dr. Cheryl Osbo[redacted]09@gmail.com.
g) No information that identifies me will be released without my separate consent and all identifiable information will be protected to the limits allowed by law. If the study design or the use of the data is to be changed, I will be informed, and consent re-obtained.
h) If I have any questions, comments, or concerns about the study or the informed consent process, I may write or call the Office of the Vice Chancellor of Academic Affairs, UMass Global, at 16355 Laguna Canyon Road, Irvine, CA 92618, 949.341.7641.

I acknowledge that I have received a copy of this form and the "Research Participant's Bill of Rights." I have read the above and understand it and hereby consent to the procedure(s) set forth.

_____ _____

Signature of Participant or Responsible Party Date

_____ _____

Signature of Principal Researcher Date

Appendix E: Pilot Interview Participant Feedback Questions

Conducting interviews is a learned skill that takes practice. One of the best ways to gain valuable insight into your interview skills is to practice with a skilled researcher. After the pilot interview, reflect on the question below. Additionally, ask the questions to the observer and record their responses. Use your reflection and the feedback from the observer to improve your interview skills.

1. How do you feel about the interview? Do you think you provided the participant with plenty of opportunity to describe the challenges and best practices of Marketing Directors as they lead brand and culture alignment at Private Non-Profit Higher Education Institutions?

2. Do you feel there was enough time allotted for the interview?

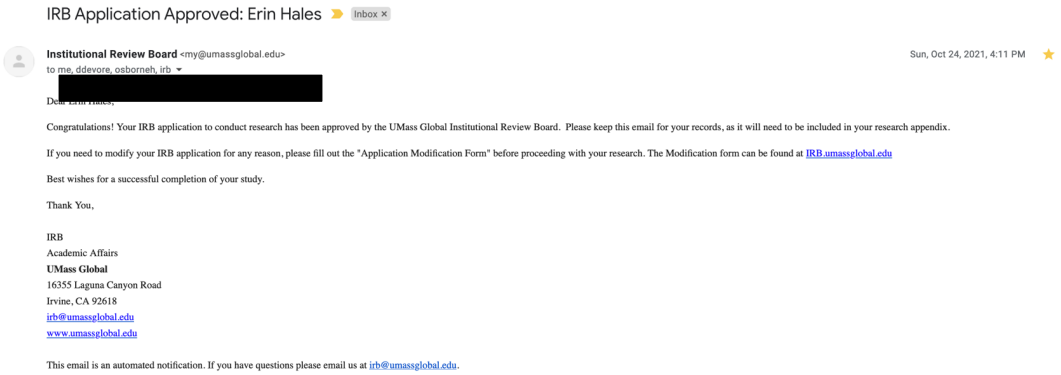
3. Were the questions written clearly or were there times when the participant was unsure about what was being asked?

4. Was the protocol written to allow for a relaxed and natural conversation?

5. Were there any terms used during the interview that were unclear or needed a better explanation?

6. Finally, how were my interviewing skills (i.e., tone, body language etc...)? Did I come across as being comfortable during the interview?

Appendix F: UMass Global University Institutional Review Board Approval



IRB Application Approved: Erin Hales Inbox ×

Institutional Review Board <my@umassglobal.edu> Sun, Oct 24, 2021, 4:11 PM

to me, ddevore, osborneh, irb

[redacted]

Dear Erin Hales,

Congratulations! Your IRB application to conduct research has been approved by the UMass Global Institutional Review Board. Please keep this email for your records, as it will need to be included in your research appendix.

If you need to modify your IRB application for any reason, please fill out the "Application Modification Form" before proceeding with your research. The Modification form can be found at IRB.umassglobal.edu

Best wishes for a successful completion of your study.

Thank You,

IRB
Academic Affairs
UMass Global
16355 Laguna Canyon Road
Irvine, CA 92618
irb@umassglobal.edu
www.umassglobal.edu

This email is an automated notification. If you have questions please email us at irb@umassglobal.edu.

Appendix G: Definitions of Terms

Date: Month Day, 2021

Dear Study Participant:

Thank you for your willingness to participate in a qualitative study about The Challenges and Best Practices of Marketing Directors Leading Brand and Culture Alignment at their Private Non-Profit Higher Education Institution. Prior to our interview, I wanted to ensure I provided the interview questions in advance for your review along with the Definition of Terms that will be used during our interview.

If you have any questions, please don't hesitate to reach out.

I truly appreciate you taking the time to participate in my study. I look forward to talking with you soon.

With Gratitude,

Erin Hales, MBA

Doctoral Candidate
UMass Global in Organizational Leadership

Definitions

This section provides the clarity of theoretical and operational terms significant to the study. Each definition gives meaning to the terms and concepts when referencing marketing, brand and culture.

Theoretical Definitions

Activity Theory (AT). A strong and descriptive, theoretical method, that seeks to understand the connection how elements impact an activity in a societal structure. These two elements are classified into one of the following four categories: *Tools* (also known as instruments or artifacts), *Rules*, *Community*, and *Division of Labor* (Engeström, 1999).

Operational Definitions

Activity. An activity is an intentional form of action between an individual, object, initiative, or purpose.

Administration. The key leadership of a college or university responsible for the protection and management of the institution.

Admissions. The team of individuals at an institution responsible for the outreach, evaluation, and authority of admitting students.

Advancement. The department responsible for fundraising, endowments and philanthropy at an institution.

Barriers. Tensions or challenges that may cause the subject difficulty to meet their activity or outcome.

Brand/Branding. "A brand is a distinct product, service, or business, and branding is the act of impressing a product, service, or business on the mind of a consumer or set of customers" (Vaid & Campbell, 2003, p. 3).

Brand Equity. How an institution represents itself to produce institutional brand benefits (Toma et al., 2005).

Brand Identity. Who or what your brand is. This can include, but not be limited to visible elements like logos, colors, design, etc. that help distinguish an institution's brand.

Brand & Culture Fusion. The full integration and alignment of external brand identity and internal organizational culture (Yohn, 2018).

Community. A connected group of individuals who share common values, work or interests.

Culture. The shared attitude, characteristics, attributes, and values of an organization.

Division of Labor. The structure of who does what in relation to an individual, object, initiative, or purpose.

Generation Alpha. The generation succeeding Generation Z, born between 2010-2024.

Generation Z or Gen Z. The generation succeeding Millennials, born between 1995-2009.

Marketing. The action or business of promoting a product, service or good using the means of branding, advertising, market research, design, brand management, marketing communications, advertising, public relations, website, digital and social media.

Marketing Department. The team of people responsible for the promotion of the institution's creative, brand and marketing strategy, policies and initiatives, including, but not limited to: market research, design, brand management, marketing communications, advertising, public relations, website, digital and social media.

Marketing Director. The individual who oversees and leads creative, brand and marketing strategy, policies and initiatives, including, but not limited to: market research, design, brand management, marketing communications, advertising, public relations, website, digital and social media.

Private Non-Profit Higher Education Institution. An institution that is both not-for-profit and tax exempt by using less funding from state and federal funds with the focus on reinvesting those funds into the educational mission of the college or university.

Rules. The cultural norms, rules or regulations leading the goal of an activity.

Subject. The person who carries out the activity in the research.

Tools. The means in which the activity is carried out through artifacts and instruments that are used by the subject.

Appendix H: Interview Protocol (DRAFT)

My name is Erin Hales, and I am the Director of Marketing and Communications at a Private Non-Profit Higher Education Institution in Southern California. I lead the marketing, branding, and communications for the institution and have over 16 years of marketing, branding and communications experience ranging from higher education, health care, non-profit and K-12.

I am currently a doctoral candidate at UMass Global in Organizational Leadership and I am working on my dissertation. For my study, I am most interested in hearing about your experience leading brand and culture alignment at your private non-profit higher education institution. The purpose of my study is to learn from Marketing Directors, like you, about your challenges and recommended best practices in leading brand and culture alignment at your private non-profit higher education institution.

I am conducting approximately15 interviews with Marketing Directors at private non-profit higher education institutions in California. Hearing your story will hopefully provide valuable awareness into common challenges and best practices that marketing directors may encounter so other marketing directors can use this information to help lead brand and culture alignment efforts at their private non-profit higher education institution to meet the future needs and expectations of higher education.

The questions that I am asking are scripted and are the same for all participants. However, I may ask follow-up questions if more information is needed, or something is unclear. The reason for this, is to guarantee, as much as possible, that all interviews are conducted in a similar manner.

Informed Consent

Before moving forward with our interview, I want to remind you that you received a copy and signed the Informed Consent and UMass Global Bill of Rights I sent you via email prior to our meeting. Do you have any questions or need clarification regarding either document?

Interview Logistics

We have scheduled an hour for the interview. At any point, you may ask that I skip a question or stop the conversation altogether. If you get tired, we can also take a break if needed. Additionally, in the rare occurrence I am processing interview data, I may reach out for clarifying questions.

Do you have any questions before we begin?

Okay, let me start the recording and we will begin.

Interview Questions

The purpose of my study is to learn from marketing directors, like you, about the challenges and best practices you have leading brand and culture alignment at your private non-profit higher education institution. To do this, my study uses Activity Theory, which is a framework to explore the activity, 'Marketing Directors at their Private Non-Profit Higher Education Institution (subjects) – Helping Shape Brand and Culture (objects) – and How they Achieve Brand and Culture Alignment (outcomes).' This framework helps to better define the complex brand and culture work of Marketing Directors and explore the challenges and best practices leading brand and culture alignment at your private non-profit higher education institution.

Challenges and best practices are organized into four categories: rules, community, division of labor, and tools. I will be asking specific questions about each of these factors. The definition of the four factors as well as examples will be provided with each question below.

For all the questions, I will start by providing you with the definition and will then move to how it applies to Marketing Directors before asking you the main question.

Are you ready?

For the first question, we are going to look at the first category of challenges and best practices, which is "rules." For this study, rules are defined as:

Rules Definition. *The cultural norms, rules or regulations that you are required to follow in your Private Non-Profit Higher Education Institution. Rules can include, but are not limited to: brand guidelines, cultural norms, mission, vision and values of your Private Non-Profit Higher Education Institution.*

As a Marketing Director, there are many rules that guide the institution. From the mission, vision and values of the institution, to the brand guidelines and culture norms, rules are a factor which can provide to guidance to institutions or create limitations for departments. For instance, having to get departments on board to adhere to the brand guidelines and work with the marketing office to produce quality pieces for the institution could be a rule that guides best practices and challenges.

For question one, I want you to think about the rules that are in ongoing as you lead brand and culture, please tell me about...

1. What rules, implied or explicit, spoken or unspoken, were challenging to you leading brand and culture alignment?
   Optional Probes:

    1. I want to know more; can you share with me how this rule affected your ability to lead your institution to achieve brand and culture alignment?
    2. When did this occur?
2. What rules, implied or explicit, spoken or unspoken, would you consider best practices leading brand and culture alignment?

Optional Probes:

1. I want to know more; can you share with me how this rule affected your ability to lead your institution to achieve brand and culture alignment?
2. When did this occur?

3.When thinking about the rules you just mentioned as challenges, how did you address these?

Optional Probes:

1. Can you share with me more about why this was so challenging?
2. What challenges had the strongest impact on your ability to lead brand and culture?

4.Thinking about the rules you just mentioned as best practices, how did you address these?

Optional Probes:

1. Can you share with me more about why it was considered a best practice?
2. What best practices had the strongest impact on your ability to lead brand and culture?

For the second set of questions, we are going to move to the second category of challenges and best practices, which is "community." For this study, community is defined as:

Community Definition. *The connected group of individuals who share common values, work or interests. Community can include, but is not limited to: Faculty, staff, current students, potential students, donor and alumni..*

As a Marketing Director involving stakeholders across the institution is essential to gaining support. I am interested in learning more about the groups of people you work with at your institution as you lead brand and culture alignment. This may include groups from within or outside of your organization. For example, did you have to work a staff member from a department on a brand project, or did you partner with any faculty to help lead an institution initiative?

For question two, I want you to think about the groups that you work with when you lead brand and culture alignment, please tell me about...

1. What groups, inside and outside of your organization, did you experience being a challenge to leading your Private Non-Profit Higher Education Institution to achieve brand and culture alignment?
   Optional Probe:

    1. I want to know more; can you share with me how this group affected your ability to lead brand and culture alignment?
    2. When did this occur?
2. What groups, inside and outside of your organization, did you experience being as a best practice leading your Private Non-Profit Higher Education Institution to achieve brand and culture alignment?
   Optional Probe:
    1. I want to know more; can you share with me how this group affected your ability to lead brand and culture alignment?
    2. When did this occur?
3. When thinking about the institutional Community, either internally or externally, what have helped when leading brand and culture alignment?
   Optional Probe:
    1. Can you share with me more about why they were so effective?
    2. What was the greatest influence on leading brand and culture alignment?
    3. What groups, if any, were you not able to address but you think it would have assisted you in achieving brand and culture alignment?

For the third set of questions, we are going to move to the third category of challenges and best practices, which is "division of labor." For this study, division of labor is defined as:

Division of Labor Definition. *The structure of who does what in relation to an individual, object, initiative or purpose responsible for executing different tasks. Division of Labor can include, but is not limited to: Office of Marketing & Communications, President, Administration, etc…*

As a Marketing Director, you work with many different groups of individuals daily. Gaining support and buy-in from these groups is imperative when trying to achieve brand and culture alignment. I am interested in learning how these different groups of individuals affected your ability to achieve brand and culture alignment. For example, how was the interaction with your President, Administration and Marketing Team provide support or lack of support during this process?

For question three, I want you to think about the division of labor present during your leadership to achieve brand and culture alignment.

1. When thinking about these different groups of individuals within your institution, what groups did you experience as being a challenge to you leading your Private Non-Profit Higher Education Institution to achieve brand and culture alignment?
   Optional Probe:
    1. I want to know more; can you share with me how this group affected your ability to lead your school to achieve brand and culture alignment?
    2. When did this occur?
    3. What groups, from the ones you spoke about, had the most impact on leading brand and culture alignment?

2. When thinking about these different groups of individuals within your institution, what groups did you experience as being as an example of a best practice to you leading your Private Non-Profit Higher Education Institution to achieve brand and culture alignment?
   Optional Probe:
   1. I want to know more; can you share with me how this group affected your ability to lead your school to achieve brand and culture alignment?
   2. When did this occur?
   3. What groups, from the ones you spoke about, had the most impact on leading brand and culture alignment?

4. When thinking about the Division of Labor, either internally or externally, what has helped when leading brand and culture alignment?
   Optional Probe:
   1. Can you share with me more about why that Division of Labor was so effective?
   2. What provided the greatest influence on leading brand and culture alignment?
   3. What groups, if any, were you not able to address but you think it would have assisted you in achieving brand and culture alignment?

For the fourth set of questions, we are going to look at the final category of challenges and best practices, which are "tools." For this study, tools are defined as:

Tools Definition. *Tools, also known as artifacts or instruments, are anything internal or external used by you to assist in Private Non-Profit Higher Education Institution. Samples of tools can include, but are not limited to: verbal or visual brand identity, culture drivers, marketing systems and protocols, technology, etc...*

Typically, tools are most known as objects that assist individuals in their daily work. Tools for this study, however, also include factors, such as culture drivers or marketing systems like project management or customer relationship management systems. When leading brand and culture alignment at your Private Non-Profit Higher Education Institution, not having access to the right tools or knowing how to get others to use the tools could be problematic. For example, having a department who refuses to integrate the visual and verbal brand identities could be a potential challenge. Keeping this in mind...

For question four, I want you to think about the tools that you experienced as you lead brand and culture alignment, please tell me about...

1. What tools did you experience as being a challenge to you leading your Private Non-Profit Higher Education Institution to achieve brand and culture alignment?
   Optional Probe

1. I want to know more; can you share with me how this tool or lack of tool affected your ability to lead your Private Non-Profit Higher Education Institution to achieve brand and culture alignment?
2. When did it occur?
3. What tools, from the ones you spoke about, had the most impact on your leading brand and culture alignment?

2. What tools did you experience as being a best practice to you leading your Private Non-Profit Higher Education Institution to achieve brand and culture alignment?
   Optional Probe
   1. I want to know more; can you share with me how this tool or lack of tool affected your ability to lead your Private Non-Profit Higher Education Institution to achieve brand and culture alignment?
   2. When did it occur?
   3. What tools, from the ones you spoke about, had the most impact on your leading brand and culture alignment?

3. When thinking about the Tools, either internally or externally, have helped when leading brand and culture alignment?
   Optional Probe:
   1. Can you share with me more about why those Tools were so effective?
   2. What Tools had the greatest influence on leading brand and culture alignment?
   3. What groups, if any, were you not able to address but you think it would have assisted you in achieving brand and culture alignment?

Conclusion. While, that concludes the four factors of Activity Theory, I want to give you the opportunity to talk about any other challenges or best practices that were imperative to your leadership to achieve brand and culture alignment that you have not yet discussed.

1. Please share any other challenges or best practices not addressed above that you experienced while leading your Private Non-Profit Higher Education Institution to achieve brand and culture alignment.
2. Reflecting on all the challenges and best practices you discussed in this interview (i.e., rules, community, division of labor, and tools), which challenges or best practices do you think had the greatest impact on you leading your Private Non-Profit Higher Education Institution to achieve brand and culture alignment?
3. Finally, I am interested in collecting artifacts that support your experience with the four types of challenges and best practices, as well as evidence of the leadership that you took. For example, viewbooks, brand guidelines, vision statements, marketing projects, annual reports, to name a few. Please share with me some examples of artifacts that may help support your experience.

This concludes our interview. Thank you again for taking time to participate in my study. If you would like, I will send you a link to my study when results and findings are completed.

Optional Prompts. The interviewer can use prompts if an answer is not sufficient in detail. These prompts may or may not be used during the interview.

1. “Can you clarify what you meant by...?”
2. “Would you expand on that?”
3. “Can you tell me more about...?”
4. “Can you give me an example of...?”
5. “Why do you think that is the case...?”
6. “Why do you think that support was so effective?”

Appendix I: Synthesis Matrix

Source(s)	**Theme**: Brand	**Theme**: Culture	**Theme**: Brand & Culture Alignment	**Theme**: Marketing	**Theme**: Higher Education	**Theme**: Higher Education Marketing	**Theme**: Marketing Directors	**Theme**: Activity Theory/Methodology	**Theme**: Generations	**Theme**: COVID-19
Alexandra, I., Petruta, M., & Gheorghe, M. (2014). Integrating country-specific culture in the branding strategy for building global success. *Sea: Practical Application of Science, 11*(5), 355-358.	X	X	X							
Ali-Choudhury, R., Bennett, R., & Savani, S. (2009). University marketing directors' views on the components of a university brand. *International Review on Public and Nonprofit Marketing, 6*(1), 11-33. https://doi.org/10.1007/s12208-008-0021-6	X			X	X	X	X			
Altbach, P. G. (2005). The private higher education revolution: An introduction. In P. G. Altbach & D. C. Levy (Eds.), *Private higher education: A global revolution* (pp. 1-9). Boston, US: Brill Sense. https://doi.org/10.1163/9789087901035_002					X					
American University. (n.d.). *Know wonk*. Retrieved from https://www.american.edu/ucm/wonk-campaign.cfm	X			X	X	X				
Anholt, S. (2005). Some important distinctions in place branding. *Place Branding, 1*(2), 116-121. https://doi.org/10.1057/palgrave.pb.5990011	X									
Arild, W., & Marianne, N. S. (2009). Defining the essence of a university: Lessons from higher education branding. *Higher Education, 57*(4), 449-462. https://doi.org/10.1007/s10734-008-9155-z	X			X	X	X				

Baldwin, G. (1994). The student as customer: the discourse of "quality" in higher education. *Journal of Tertiary Education Administration, 16*(1), 125-133. https://doi.org/10.1080/1036970940160110					X					
Bastedo, M. N. (2005). The uses of institutional culture: Strengthening identification and building brand equity in higher education (review). *The Review of Higher Education, 29*(2), 240-241. https://doi.org/10.1353/rhe.2005.0077	X	X		X		X				
Bastedo, M. N., & Gumport, P. J. (2003). Access to what? Mission differentiation and academic stratification in US public higher education. *Higher Education, 46*(3), 341-359.					X					
Bastos, W., & Levy, S. J. (2012). A history of the concept of branding: practice and theory. *Journal of Historical Research in Marketing, 4*(3), 347-368. https://doi.org/10.1108/17557501211252934	X			X						
Bennett, R., & Ali-Choudhury, R. (2009). Prospective students' perceptions of university brands: An empirical study. *Journal of Marketing for Higher Education, 19*(1), 85-107. https://doi.org/10.1080/08841240902905445	X					X				
Berndt, A., & Hollebeek, L. D. (2019). Brand image and reputation development in higher education institutions. In B. Nguyen, T. C. Melewar, & J. Hemsley-Brown (Eds.), *Strategic brand management in higher education* (pp. 143-158). New York, NY: Routledge. https://doi.org/10.4324/9780429029301-8	X				X					
Blankenberger, B., & Williams, A. M. (2020). COVID and the impact on higher education: The essential role of integrity and accountability. *Administrative Theory & Praxis, 42*(3), 404-423. https://doi.org/10.1080/10841806.2020.1771907					X					X
Borden, N. H. (1964). The concept of the marketing mix. *Journal of Advertising Research, 4*(2), 2-7.				X						
Chapleo, C. (2005). Do universities have "successful" brands? *International Journal of Educational Advancement, 6*(1), 54-64.	X				X	X				

https://doi.org/10.1057/palgrave.ijea.2140233										
Chapleo, C. (2015). Brands in higher education. *International Studies of Management & Organization, 45*(2), 150-163. https://doi.org/10.1080/00208825.2015.1006014	X				X	X				
Chingos, M. M. (2017). *Don't forget private, non-profit colleges.* Retrieved from http://hdl.handle.net/10919/97796					X					
Clark, B. R. (2017). *The distinctive college: Antioch, Reed, and Swathmore.* New York, NY: Routledge.					X					
Cohen, A. M., & Kisker, C. B. (2009). *The shaping of American higher education: Emergence and growth of the contemporary system*. New York, NY: John Wiley & Sons.					X					
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