

PUBLIC AND PRIVATE SCHOOL MARKETING INITIATIVES IN CENTRAL
INDIANA: AN EXPLORATORY STUDY

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With the largest and fastest growing voucher program in the United States, Indiana schools are now faced with more competition than ever. The argument of this study is that with increased access to choice in educational programming, comes an increased need for school marketing. Examined, were the marketing practices of public and private schools in central Indiana. Also explored were the extent to which school choice initiatives in the state have impacted school and district marketing decisions.

The social research questions posed were explored through a mixed methods study, attempting to understand Indiana public and private school marketing practices from the perspective of private and public school marketing professionals. Methods of data collection included electronic survey, semi-structured interview, and document collection.

Results yielded evidence of an open playing field in the realm of educational marketing, with approaches varying in both funding and in practice across educational institutions, traditional public, public charter, and private. Professionals have the opportunity to learn from one another and to collaborate, supporting more efficient marketing of the organization and what they have to offer both students and families.

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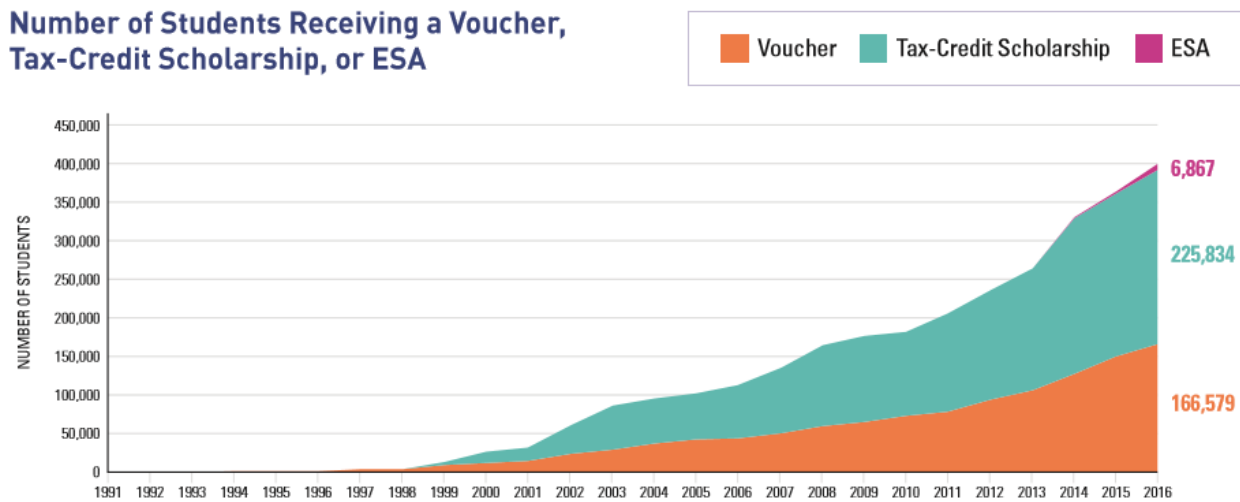
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CHAPTER I: INTRODUCTION

Background Information

Educational options in the United States are growing: traditional public schools, charter schools, private schools, magnet schools, homeschooling, and online learning. Families have more choices than ever with regard to their child’s education. The number of students using vouchers, tax credit scholarships, or educational savings accounts (ESA) is on the rise. Though programming varies from state to state, Table 1, below, from the Friedman Foundation (2016), shows the increasing number of students receiving a voucher, tax credit, or ESA in the United States.

Table 1.

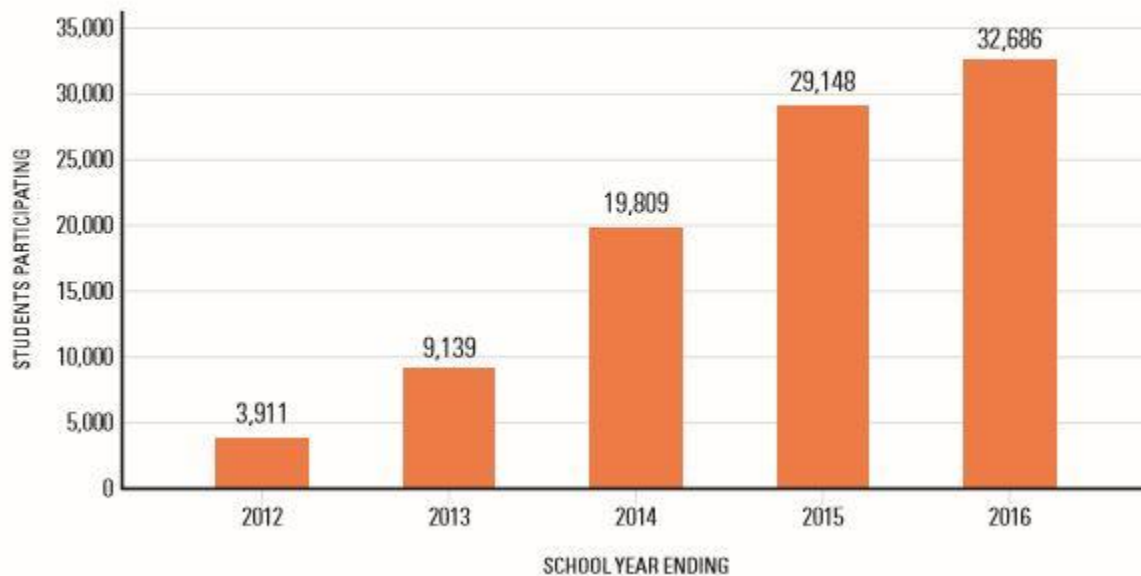


Numbers like those in Table 1 are mirrored in Indiana, where initiatives supporting school choice are vast. With participation in the School Scholarship Tax Credit, the School Scholarship Program, and the Private School/Homeschool Deduction, more and more families are taking advantage and sending their children to private institutions. The Scholarship Program and voucher program are synonymous terms.

According to the Friedman Foundation's 2016 report, during the 2014-2015 school year, 9,127 vouchers were awarded in Indiana, with 318 private schools participating. There were five scholarship organizations in place providing an average scholarship value of \$1,361. Roughly 52% of families with school age children in the state of Indiana met the School Scholarship Tax Credit income requirement (Friedman Foundation, 2016). Indiana currently has the largest and fastest growing voucher program in the United States, for which families qualify by meeting one of seven pathway requirements set forth by the Indiana Department of Education and expanded upon in Chapter II. Table 2 (Friedman Foundation, 2016) shows the growth in the program since its inception in 2011.

Table 2.

Participation in Indiana's voucher program has grown each year since its inception.



The significance of the voucher program in Indiana and problem posed to public education, is that it diverts education dollars allocated by the state away from public schools. In a 2015 Indiana Department of Education public records request by Jeremy Deaton with the Indiana

State Teachers Association (ISTA), the top ten losing public school districts lost over \$45 million from vouchers that diverted money to private schools (Deaton, 2015). This dollar amount will continue to grow as the program continues to expand. According to the Indiana Department of Education, in 2016, Indiana spent over \$18 million more on vouchers than in 2015. In Indiana, Average Daily Membership/Attendance (ADM) counts are done twice annually, with enrollment numbers in schools directly impacting the dollars received. According to the National Center for Educational Statistics (2016), the average unadjusted per pupil expenditure in Indiana in 2012-2013 was \$10,268. Qualifying low and middle income families can use up to 90% of those allocated dollars from the sending school district to pay the tuition at a qualifying private institution. Private institutions wishing to accept voucher dollars must go through an application process with the Indiana Department of Education (Indiana Department of Education, Choice Scholarship Program, 2016).

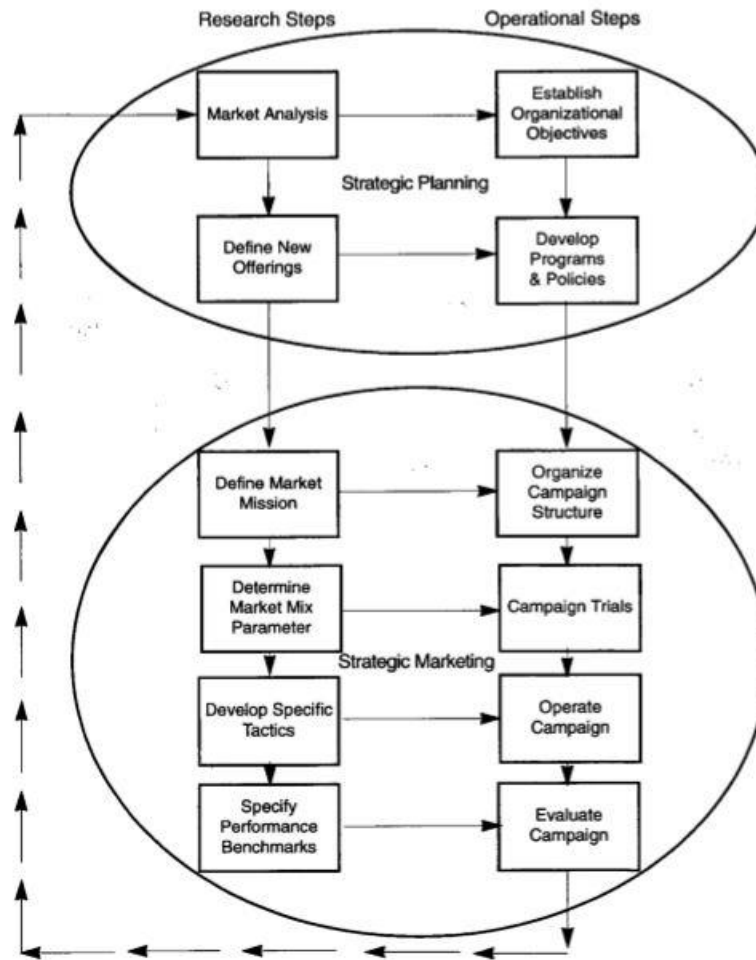
There is a clear incentive for parents to participate who have interest, but who could not otherwise afford to send their child or children to a private school. Program participation also increases families' ability to access parochial education at the primary and secondary level. By increasing access for low-income families, the success of the voucher program affirms that with economic advantage comes increased choice. Without that financial advantage, choice is otherwise limited.

The argument of this study is that increased choice in educational programming has resulted in an increased need for school marketing. Historically, with limited choice, the public was less aware of the happenings or public relations of American public schools and families defaulted to their neighborhood school unless they were in a position to fund a private or parochial education (Jones, 1980). Private schools and higher education institutions have the

advantage when it comes to experience in school marketing, in that they have been forced to market themselves since inception. According to Hansen and Henry (1993), “providing for clear and convincing exchanges of information between schools and the communities they serve is a critical undertaking” (p. 80). Program sustainability for private institutions is dependent upon families consciously electing to send their child to that school.

In making the case for school marketing, it is important to distinguish between school public relations programming and school marketing. Public relations are defined by Hansen and Henry (1993) as, “a broad-based, multi-faceted approach to building public understanding for the full range of activities going on within an institution such as a school system” (pp. 80-81). Programming generally exists to keep the public informed about school happenings and to elicit goodwill, positive attitudes, respect, understanding, and basic support (Hansen & Henry, 1993). Public relations and school communications are broad in nature, whereas marketing is far more targeted and involves specific school programming and communications that are responsive to the needs and desires of specific markets (Hansen and Henry, 1993). Figure 3 below by Hansen and Henry (1993) illustrates the Strategic Marketing Planning Process, exemplifying its intentionality and further distinguishing between public relations and marketing.

Table 3. The Strategic Marketing Planning Process



Schools, both public and private, must strategize the approach taken in communicating their message to their target audience or market. This involves determining who that audience is (homeowners, families, businesses) and then doing a market analysis of the best ways of communicating the organizational message to that specific group. Once determined, a strategy can be developed. Hansen and Henry (1993) are quick to note that educators can identify with some of these strategic marketing steps using terms like needs assessment, program development, and performance measurement, and often choose to adopt a reactive and mass marketing approach for their programs, inconsistent with the detailed strategy in Table 3. Strategy varies from district to

district and school to school, with marketing often seen as superfluous, and therefore overlooked or under budgeted, reaffirming the need to examine the current practices of both private and public schools.

Problem Statement

With increased access to choice in educational programming in central Indiana comes an increased need for school marketing. Program sustainability for educational organizations is dependent upon families consciously electing to send their child to that school. Little attention has been paid to what, specifically, central Indiana schools are doing to market their program(s) to the population they wish to serve.

Purpose of Study

The purpose of this study is to examine the marketing practices of public and private schools in central Indiana. Also explored will be the extent to which school choice initiatives in the state have impacted school and district marketing decisions.

Research Questions

The study focuses on school marketing initiatives in central Indiana, seeking to answer the following research questions:

1. What are current marketing practices in central Indiana public and private schools?
2. What is the motivation to engage in school marketing?
3. In what ways do public and private school marketing practices differ from one another in central Indiana?
4. How do school officials (district or private school administrators) perceive that school choice initiatives have motivated marketing practices for their school or district?

The social research questions posed will be explored in the context of a mixed methods study, and attempt to understand Indiana public and private school marketing practices. True understanding is likely to involve important contextual conditions (Yin & Davis, 2007). Multiple agencies will be examined around the phenomenon of school marketing in both public and private institutions in central Indiana. Included are public charter schools, funded based on enrollment, and included in the sample. Despite their many operational differences, without geographically bounded populations, public charters are forced to recruit more like private institutions. Tools used to collect data will include survey of, and semi-structured interviews with, school/district marketing professionals, as well as document collection and analysis.

When examining the ways in which public and private school marketing efforts in Indiana differ from one another, the study also explored the extent to which school choice initiatives in the state have impacted school and district marketing decisions. This is from the perspective of private school, traditional public school district, and public charter school marketing professionals. Research specific to initiatives following the introduction of choice scholarships/vouchers in Indiana in 2011 is extremely limited. This study will attempt to fill that gap and to identify marketing trends currently in practice in both public and private institutions.

Conceptual Framework

The conceptual framework applied to the study is new institutional theory, largely based on the work of Meyer & Rowan (1991), an advancement on Selznick's institutional theory (Scott, 1987). Increased school choice has created a larger educational institution, and therefore an increased need for the marketing of the school organization.

The most fundamental thing an organization does is to attempt to survive by striving to appear legitimate to the outside world. According to Suchman (1995), legitimacy is, "a

generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of values or norms” (p. 574). Schools are examples of organization fields, defined by Powell & DiMaggio (1991) as, “those organizations that, in the aggregate, constitute a recognized area of institutional life” (p. 64). Public and private schools may be in competition with one another, but do similar things and belong to the same organizational field. Legitimacy comes from the adoption of practices from the organizational field.

Schools are expected to look a certain way and to do certain things. It is important to state that while marketing can have impact on perception of schools, this study does not seek to determine legitimacy or outcomes of the schools or districts, only the marketing practices that may influence public perceptions of legitimacy.

A comprehensive literature review in Chapter II lends insight and rationale to both the research questions and the conceptual framework.

Limitations

This study has several limitations that must be considered and that will be expanded upon in Chapter III. These limitations include:

- A possible lack of applicability to other settings, such as more rural communities, or even outside of the state of Indiana. Findings may not be relevant to a state or community with limited school choice programs.
- The possibility that school or district marketing practices are influenced by factors other than school choice.
- The possibility of researcher bias, as the investigator’s employment is in the role of a school communications and marketing professional in a public school district in Indiana.

- Consideration that the documents obtained were not developed for research purposes.

Significance

With expanding school options and the largest and fastest growing voucher program in the United States, central Indiana schools are now faced with more competition than ever. Increased school choice has created a larger educational institution, and therefore an increased need for school marketing.

Findings of this study can provide insight to public and private educational institutions on actions taken by their peers to promote unique programming and to celebrate excellence. In particular, public schools have the opportunity to compare their efforts with their private school colleagues, who have been marketing their programs for a longer period of time, to determine if adequate and effective initiatives are in place. Additionally, this research can provide insight to district leadership with regard to prioritizing financial investment in marketing. For school marketing professionals, the research provides data on direct advocacy for the work.

CHAPTER II: LITERATURE REVIEW

Nature of School Marketing

The stage for educational marketing has been set. A recurrent theme in school (educational) marketing is that public schools have not marketed themselves. Meanwhile, their private school colleagues have long been dependent on marketing for enrollment. Davies and Ellison (1997) define educational marketing as “the means by which the school actively communicates and promotes its purpose, values, and products to the pupils, parents, staff and wide community” (p. 3). Hansen and Henry (1993) believe that it, “Involves developing or refining specific school programs and response to the needs and desires of specific target markets (e.g., “at risk” families, parents of preschool children, voters), and using effective means of communication to understand those needs and to inform and motivate those markets” (p. 81). The target market is made up of all school stakeholders.

Parents, students, staff, and community members who are informed of the happenings in their community public schools are more likely to demonstrate support, thus strengthening the school system. According to Hiatt-Michael (2001), “There is growing recognition that all aspects of school improvement – challenging curricula, instruction for active learning, rigorous assessments, and effective school management and classroom organization - are more likely to succeed if families and communities are both involved and invested” (p. 1). Imperative to economic development, schools must effectively communicate and market themselves and their product to a target audience. That audience cannot be only students and families, but must include all school stakeholders. Attractive schools support attractive and desirable communities. Pfeiffer and Dunlap (1988) discuss this need to market/advertise and ultimately to influence the entire

community within the context of a family relocation. Basic concepts explored by Pfeiffer and Dunlap (1988) in advertising education include:

- *Primacy of the Product*: The product must remain consistently good with focus on the successes, not the shortcomings (p. 14)
- *Identification*: Packaging a program's unique qualities. Uniqueness is intrinsic, identification can be superimposed (p. 15)
- *Timeliness*: Public memory is short. Ensure product provided is ready (p. 15)
- *Price*: Community expectations must be assessed and appropriate, sustainable programs developed (p.16).

Higher education has long recognized and supported the need for advertising and marketing educational program offerings (Tolbert, 2014). Bryan Sanderson, Chairman of the Learning Skills Council, is known for identifying post-secondary shortcomings of educational advertising and branding. Sanderson (2001) believes that education is not for the few, it is for the masses, and must be communicated, branded, and sold as such.

Beside higher education, which has been marketing their programming for years, are private and parochial schools. Unlike their peers in public education, the operational budgets of private and private parochial schools are not subsidized by the state, making program marketing essential to their livelihood.

Though the above information focuses on a collegiate population and beyond, the same principles apply to K-12 school marketing efforts. The universal issue of education deserves a strategic plan that elicits public confidence. According to Hanson and Henry (1993), "The use of strategic marketing processes typically associated with the private sector can be of significant

value to school systems in developing public confidence and support, and in establishing guidelines for future development” (p. 79). “Unfortunately, these tasks are typically carried out sporadically in a relative manner, using a mass marketing approach” (Hanson and Henry, 1985 p. 88). Strategic educational marketing requires knowledge of the community it wishes to serve. Professional educators, not marketing experts, generally do school marketing work. This study will provide insight as to the practices currently in place.

Confidence with & Engagement in Public Education

The importance of public confidence in education extends beyond those with school age children. A recurring theme is the sizable percentage of the population that is entirely disengaged or “aloof” with public education (Hanson & Henry, 1985, p. 80). Another theme is the public’s lack of knowledge around the charter school movement and school funding.

According to the Indiana Department of Education Compass website (2017), in 2016 there were 1,139,822 students in the state of Indiana enrolled in public elementary and secondary schools. According to the United States Census Bureau (2016), the population of the state of Indiana in 2010 was 6,483,802 million people. This means that roughly 17.6% of the state’s population is comprised of school age children enrolled in public institutions.

With the remaining 82.4% of the student population not directly engaged in the day-to-day work of the public education system, their parents and guardians become targets for confidence building around public education. Hansen and Henry (1993) affirm the importance of this confidence, citing a “...frequent unwillingness of communities to pass bond issues and tax levies intended to support public schools” (p. 80). Schools in Indiana are funded by the state, which obtain some of these funds through property taxes. In the state of Indiana, and in accordance with

the Indiana Department of Local Government Finance and Tax Bill 101, the total tax against a residential dwelling can only be one percent of its gross assessed valuation (Indiana Department of Local Government Finance, 2017). While they may not want increased taxation, taxpayers who are unaware of the mission and initiatives of their local public schools are less likely to support them with increased tax bills, passed through referendum.

Results of the 2013 Phi Delta Kappa (PDK) Gallup Poll on what Americans are saying about public education revealed two trends of note for this study. One is a national perception, that charter schools “probably offer a better education than traditional public schools” (2013 PDK Gallup Poll Highlights, p. 8). The second is that overall, Americans are not supportive of spending public dollars on private education through the voucher system. This is important, given the prevalence of both charter schools and voucher use in central Indiana.

Private school educator, Tony Klemmer (2007), feels strongly that mission, or why a school exists, should be at the front of any marketing initiative. In the independent school arena, Klemmer (2007) posits that, “In the case of schools, marketing includes stimulating awareness among families with prospective students, stimulating interest among alumni and other constituents who have the capability to support the school financially, and creating awareness of the institution among prospective faculty and administrators” (p. 2). He writes:

Before I defend – and encourage – marketing in schools, I need to state the obvious: that of course mission is what matters most. Every school – like every institution – needs a mission that is distinct, achievable, and sustainable.

Everything that happens in schools needs to stem from its mission. The problem, I think, is not that we have forsaken marketing for mission, but rather that we have

mistaken mission for marketing. In some cases, as described by Hicks and Hawley, marketing has been introduced as a panacea for enrollment problems or as a substitute for strict adherence to mission. But it's not marketing that is the culprit here: it is the disregard for mission and disrespect for the role of marketing that is the culprit.

Hicks (1996), whom Klemmer (2007) references above, believes that some independent schools were built on a foundation of the Christian faith, and should therefore be grounded in humility. Humility, or being humble, does not lend itself to advocacy or strategic marketing to tell the story of the institution. Private, parochial institutions must couple their mission and that humility with marketing activities yielding strong admissions and opportunities for development (Klemmer, 2007).

The rise in the need for school marketing and increased competition between schools and corporations extends beyond the United States. In 2002, Davies, Adnett, and Mangan reviewed the basis for interschool competition following multiple schooling reforms in England and in Wales. Grounded in economic theory, they reference the ability of educational institutions to control both resource allocation and educational outcomes. They assert that, "...producers' behavior will reflect the nature of the market in which they operate. In markets with restricted exit and entry, competitive behavior is predicted to be stronger if the total size of the market is low relative to the producers' capacity" (Davies, Adnett, & Mangan, 2002, p. 93). These outcomes are influenced by competition, which, according to Adnett & Davis (2000), result in schools that serve niche markets. In this study, those niche market translate to those with access to both information and in the case of private schools, to financial resources.

Competition & Educational Marketing

Niche markets are often geographic in nature. A recurrent theme is the role of geography in school choice and marketing, as well as the reality that for many educators, marketing simply is not perceived as a relevant or appropriate practice. A study by Michael Bradford (1990) from the University of Manchester on *Education, Attainment and the Geography of Choice*, “concentrates on two aspects of choice in education: firstly, the changing geography of the incidence of private and state education; and secondly, the effect of the local residential environment on attainment and its consequence for school performance indicators” (p. 3). Choice options in education are not equal, with urban areas having more schooling options than their rural counterparts, with fewer options and less access to transportation. This results in school marketing that is, “... likely to reflect the unfair competition based on the present social geography of their pupils.” (p. 15). Subsequently, those in more affluent areas have more school choice than their peers living in more disadvantaged areas.

Using a marketing framework, James and Phillips (1995), “... looked at the practice of marketing in a number of schools in England and Wales using the elements of the marketing mix to analyze the different aspects of the practice” (p. 75). Though they define education as being a “service organization” (p. 75), they assert that most marketing strategies implemented were grounded in non-educational applications.

James and Phillips (1995) collected data through semi-structured interviews with teachers in eleven schools (both public and private) in high competition areas. An overarching theme was that while they recognized the value of educational marketing, none were familiar with the

“marketing mix”, a key organizational term about moving a company from where it is to where it wants to be through the understanding of current practice (James & Phillips, 1995). They state:

One outcome of this research has been a realization of the complex task that those with responsibility for marketing schools and colleges face. A variety of factors such as the range of stakeholders, the changing characteristics of the pupil customers with age, and the wide range of different facets of the service provided combine to make educational marketing a very sophisticated activity (p. 87).

A similarly small study by Izhar Oplatka in 2006 explored six Canadian teachers' perceptions of their role in educational marketing. Open, semi-structured interviews were conducted, with coding guided by comparative analysis. A recurrent theme was that teachers overwhelmingly felt that marketing was not their role, viewing it as a business tactic as opposed to an educational one. A marketing definition, “...based on aspects of selling, poaching, persuasion, and glossing” (Oplatka, 2006, p. 18), was perceived as unacceptable and downright immoral. They did, however, view themselves as advocates for both their content and for effective instruction (Oplatka, 2006), implying a more traditional definition of teaching as focusing only on pedagogy. Oplatka suggests that (p. 18-19):

It is likely that a business model of school marketing is inappropriate and needs to be replaced with a more educational approach that is based on service sector or non-profit enterprises which are more similar to schools. In that instance, marketing might still occur, but with the school viewed as a public service rather than a private business, the student as a child and citizen rather than a customer, and marketing not

so much as competition to possess “market share” and exploit “resources” as sharing of information to match educational resources to student needs.

The lack of a clearly defined model for educational marketing serves as an incentive for schools to continue to collaborate, communicate, and differentiate among themselves, as suggested above by Oplatka (2006). According to Davis, Adnett, & Mangan (2002), “It will be hard to reveal the extent of the impact of market forces on schooling through statistical studies that do not differentiate between the different patterns of competition occurring in local markets” (p. 104).

Oplataka’s findings in Canada in 2006 were consistent with an earlier study in 2002 on the emergence of educational marketing. Oplatka (2002) found that many educators do not feel that education and marketing go together, with many feeling that emphasis should be on teaching and learning, not marketing. As previously stated, some went so far as to call it immoral and unethical. However, those sentiments were found more in rural environments, where less competition existed, warranting little need for educational marketing.

Educational competition requires school staff to become advocates for their program. Oplatka completed another study in 2007 that examined the principal’s role in marketing the school. These results provided a different take on school marketing. In this study, “School principals emphasized the key role of marketing in competitive educational environments, along with some discomfort stemming from the need to be engaged in promotion, public relations, and other forms of marketing” (p. 212). Those interviewed saw school marketing as imperative to survival, but also as an opportunity to communicate excellence. Though acknowledged as

important, for them, school marketing became yet another managerial function of the job, second to their role as educator.

In contrast to those who feel educational marketing is imperative in modern society, according to Ellen Brantlinger (2003), strategic marketing on the part of public schools has far less impact on school perception and retention than does social class. Brantlinger believes that social class largely determines a child's educational experience with a correlation between a child's race/ethnicity and their schooling, as opposed to perception around schools, more strongly influenced by marketing initiatives. A student in an intensely segregated African American and Latino school is fourteen times more likely to be in a high-poverty school (more than 50% poor) than a student in a school that is more than 90% white (Brantlinger, 2003).

Decisions regarding the schooling options of poor children are being made by the middle class, those who are the most removed from their lives. They are, "grounded on the belief that dominant classes actively pursue advantage and that social class formation depends on the discursive and actual development of subordinates" (Brantlinger, p. 3). This reinforces the idea that schools reinforce this class structure of society, often unknowingly, by socializing children to conform to predetermined class-related roles and circumstances (Brantlinger, 2003). In the case of this study, Brantlinger (2003) would posit that marketing would be ineffective in attracting and retaining students who come from poor families. It is plausible that some may not have access to digital forms of communication or stable housing at which to receive promotional marketing materials.

School Choice in Indiana

Social class, socio-economics, and school marketing all play a part in school choice in the state of Indiana. Indiana is one of fifteen states nationally to participate in a voucher program (Friedman Foundation, 2016).

First proposed by economist Milton Friedman in 1955, the first program was not passed in Wisconsin until 1989. Vouchers allow per-pupil public dollars allotted for public schooling to be redirected to pay full or partial tuition at qualifying private educational institutions. These institutions may or may not have religious affiliation.

Skepticism and divisiveness around vouchers has been around for decades in the United States, with the 18th Annual Gallup Poll of the Public's Attitudes Towards the Public Schools in 1986 showing that:

Although the public, collectively, approves of the voucher system by a narrow margin, majority support for its adoption emerges in certain population segments. Nonwhites favor adoption of the system by a wide margin (54% to 33%). Similarly, those under 30, Catholics, persons residing in the inner cities, and those who are dissatisfied with the performance of the public schools (i.e. giving them a D or Failing grade) support the adoption of the voucher system by about a 5-3 margin (Bushaw, W.J., & McNee, J.A., 2009, p. 17).

The above sentiment changes in the 2017 Phi Delta Kappa Gallup Poll of the Public's Attitudes Towards the Public Schools, where support for the voucher program waivers and the public becomes more critical of the use of public dollars to fund a private education:

More Americans continue to oppose rather than favor using public funds to send students to private schools (52% to 39%). And opposition rises – to 61% - when the issue is described more details. Opposition to vouchers seems based on views about the appropriate use of school funds (Starr, Richardson, & Heller, 2017, p. 5).

Indiana houses the largest Choice Scholarship Program, synonymous with voucher program, of any state in the country. Authorized under Indiana Code 20-51-1 and Indiana Code 20-51-4, the program is administered by the Indiana Department of Education and was first implemented during the 2011-2012 school year. There were an estimated 166,579 participants during the 2015-2016 school year nationally, 32,686 of who were from Indiana (Friedman Foundation, 2016). According to the Indiana Department of Education, the state spent \$131.5 million on vouchers during the 2015-2016 school year, an \$18 million increase from 2014-2015. Qualifying families can apply up to 90% of the funds that would be allocated by the state for a public education towards tuition at a qualifying private educational institution. This diverts money out of public education and into private education. Table 4 demonstrates the extent of voucher growth in Indiana since program inception. According to the Friedman Foundation (2016), 59% of Indiana K-12 students are eligible for the Choice Scholarship Program.

Table 4. Growth of Private School Vouchers in Indiana from 2011 to 2016

Source: Choice Scholarship Program Annual Report, Indiana Department of Education, July 18, 2016

	Total Public Enrollment	Total Private Enrollment	Voucher Students	Voucher Students Never Attending a Public School	Total Cost of Voucher Payments
2011-2012	93.48%	6.52%	3,911	9.80%	\$15.5 M
2012-2013	92.82%	7.18%	9,139	21.00%	\$36.0 M
2013-2014	92.67%	7.33%	19,809	39.30%	\$78.6 M
2014-2015	92.52%	7.48%	29,146	50.40%	\$112.7 M
2015-2016	92.52%	7.48%	32,686	52.40%	\$131.5 M

For those Indiana students/families identified as eligible by virtue of being an Indiana resident between the ages of five and twenty-two who have been accepted for enrollment by a participating choice school, the Indiana Department of Education (2016) has put forth seven pathways for the voucher. Those pathways listed below are for the 2016-2017 school year (Indiana Department of Education, 2016) and include kindergarten age students. Students need only satisfy one of these criteria. They are:

1. Continuing Choice Scholarship Pathway
 - a. The student received a Choice Scholarship in the school year that immediately precedes the school year for which the student is applying for a Choice Scholarship.
 - b. The student is required to have remained enrolled at the Choice School for the entirety of the immediately preceding school year.
 - c. The student is a member of a household with an annual income equal to or below 200% of the amount to qualify for the federal free or reduced lunch program. Qualification is determined using the number of family members, relative to the annual household income.
2. Previous Choice Scholarship Pathway
 - a. The student received a Choice Scholarship in a school year that does not immediately precede the school year for which the student is applying for a Choice Scholarship.
 - b. The student received a Choice Scholarship in the immediately preceding school year but the student exited the Choice School prior to the end of the school year.
 - c. The student is a member of a household with an annual income equal to or below 150% of the amount to qualify for the federal free or reduced lunch program.

3. Previous Scholarship Granting Organization (SGO) Award Pathway
 - a. The student received an SGO scholarship in a previous school year, including a school year that does not immediately precede the school year for which the student is applying for a Choice Scholarship.
 - b. The six approved Scholarship Granting Organizations are:
 - i. Elkhart County Community Foundation
 - ii. Institute for Quality Education (Formerly Educational Choice Charitable Trust)
 - iii. School Scholarship Granting Organization of Northeast Indiana
 - iv. Tuition Assistance Fund of Southwestern Indiana (Closed)
 - v. Sagamore Institute Scholarships for Education Choice
 - vi. The Lutheran Scholarship Granting Organization of Indiana
 - c. The student is a member of a household with an annual income equal to or below 150% of the amount to qualify for the federal free or reduced lunch program.
4. Special Education Pathway
 - a. The student has a disability that requires special education.
 - b. An Individualized Education Program (IEP) pursuant to Indiana Code 20-35 or a Service Plan (SP) pursuant to 511 IAC 7-34 has been developed for the student.
 - c. The student is a member of a household with an annual income equal to or below 200% of the amount to qualify for the federal free or reduced lunch program.
5. “F” Public School Pathway

- a. The student would be required to attend a specific public school based on their residence that has been assigned an “F” grade. Note: This pathway does not require prior attendance at the school.
 - b. The student is a member of a household with an annual income equal to or below 150% of the amount to qualify for the federal free or reduced lunch program.
6. Two Semesters in Public School Pathway
- a. The student was enrolled in kindergarten through grade twelve in a public school, including a charter school, in Indiana for at least two semesters immediately preceding the first semester for which the individual receives a Choice scholarship, and
 - b. The student is a member of a household with an annual income equal to or below 150% of the amount to qualify for the federal free or reduced lunch program.
7. Sibling Pathway
- a. The sibling of the newly applying student received either a Choice Scholarship or an SGO Scholarship in a preceding school year, including a school year that does not immediately precede the school year for which the student is applying for the Choice Scholarship.
 - b. The student is a member of a household with an annual income equal to or below 150% of the amount to qualify for the federal free or reduced lunch program.

The numerous pathways to obtain a voucher increase accessibility and drive up program participation, as evidenced in Table 4. Table 5 shows the pathways Hoosiers used to access the program during the 2013-2014 school year. Table 6 shows Indiana Choice Scholarship Schools by Religious Affiliation.

Table 5. Participation in the Indiana Choice Scholarship Program by Pathway 2013-2014

Source: Indiana University Center for Evaluation & Educational Policy (2015)

Continuing Choice	36%
Previous Choice	1%
Previous SGO	12%
Special Education	5%
F School	9%
Two Semesters	23%
Sibling	14%

Table 6. Indiana Choice Scholarship Schools by Religious Affiliation 2013-2014

Source: Indiana University Center for Evaluation & Educational Policy (2015)

Catholic	55%
Other Affiliation	11%
Lutheran	10%
Not Affiliated	6%
Baptist	5%
Christian Interdenominational	5%
Other Christian	4%
Adventist	3%
Jewish	1%

Beyond the voucher program, Indiana also participates in the school scholarship tax credit program. Enacted in 2009 by Indiana Code 6-3.1-30.5 and Indiana Code 20-51, “Qualified scholarship-granting organizations (SGO) will receive funding for scholarships, which will come from private, charitable donations. Those donors (individuals and/or corporations) who have donated to an SGO approved by the Department of Education will then be eligible to take

advantage of a 50% credit against their individual or corporation state-tax liability” (Indiana Department of Revenue, 2016). Eligible parents can then apply for these scholarships to apply to approved SGOs. The Department of Revenue placed a cap of \$8.5 million on the program for FY2016, \$9.5 million for FY2017, and \$18 million for FY2018. Students are eligible to apply if they live in a household where the annual income is not 200% of the cost of the school they wish to attend. This school scholarship tax credit program provides an additional avenue for private schools to market to, and then support, the tuition costs of students who would not otherwise have the financial resources to attend their institution. In this study, marketing professionals are asked to share their thoughts on how these choice initiatives have motivated their practice.

Needed Research

Despite the rise of school choice initiatives in Indiana and corresponding research on their implementation, there is little research on what specifically private schools, traditional public school districts, and public charter schools are doing to market themselves to their stakeholders and prospective students. An additional question is whether families truly have access to the information that supports and advocates for school choice and their corresponding programming. Literature overall, and the current educational arena in Indiana, affirm the need to market educational programs and the increasing number of educational options available to students. Though the value of marketing is well known, its application to the educational arena, specifically public education, is new. Questions are raised around the applicability and appropriateness of a business model of marketing to the educational arena, as well as to whom the responsibility for marketing educational programming should fall.

The question remains, how are parents made aware of the diverse educational programming offered in central Indiana? Practically speaking, there is a gap, in that there is little social research on what marketing (if any) is being done to attract these families to schools. What, specifically, are schools doing to engage stakeholders and prospective families? This study specifically addresses both the motivation to engage in school marketing, as well as the current marketing practices in central Indiana public and private schools.

Conceptual Framework

The conceptual framework is intended to assist in grounding the study and making sense of the variables involved that directly relate to the problem. The conceptual framework applied to the study is new institutional theory. This theory is largely based on the work of Meyer & Rowan (1991), and is an advancement on Selznick's institutional theory which views organizational structures as, "adaptive vehicles shaped in reaction to the characteristics and commitments of participants as well as to influences and constraints from the external environment" (Scott, 1987).

The most fundamental thing an organization does to survive is to strive to appear legitimate to the outside world. Legitimacy comes from the adoption of practices from the organizational field, made up of the aggregate organizations that constitute a recognized area of institutional life. According to Meyer & Rowan (2006), "New forms of educational organizations ranging from home schooling, to charter schools, to privately held firms that provide tutoring and other forms of instructional services have arisen outside public education and are on the way to becoming firmly institutionalized" (p. 2). Institutional analysis lends itself to making connections between different organizations in society and examining these organizations as they relate to one another (Meyer & Rowan, 2006). By talking about an organizational field, one can talk about

entire sectors of society. Organizations in those sectors may compete with each other, but they are connected and have structural equivalence. An example would be attending grade school at a traditional public elementary school or attending a private elementary school. They compete with one another, but belong to the same organizational field or institution.

Institutionalism provides context for the study in that schools are social institutions and that they seek to legitimize. Meyer & Rowan (2006) reference how changes in the field of education over the past fifteen years have resulted in schools that are, “no longer shielded from the pressures of accountability and efficiency; the once airtight government monopoly of schooling has been invaded by private providers; the dominant institutional form of schooling no longer serves as the unrivalled model for emulation” (p. 3). Organizations, “adopt practices and forms in order to increase legitimacy and ultimately to survive” (Meyer & Rowan, 1991). This social theory of New Institutionalism applies, in that this study seeks to better understand how the different organizations (traditional public schools, public charter schools, and private schools) compare with one another in marketing to the public and families they serve.

School marketing seeks to share the legitimacy of the organization with the public by telling stories and sharing information using a variety of mediums and seeking to positively impact the perception of the school or district.

While marketing may impact public perception of schools, this study does not seek to determine legitimacy or outcomes of the schools or districts, only to determine the marketing practices that may have the ability to influence public perceptions of legitimacy.

Conclusion

The education arena, both nationally and in Indiana, has changed. For central Indiana, the educational landscape has shifted significantly since the 2012 introduction of

choice scholarships (vouchers). Shifting political landscapes, accountability (often tied to funding), and school choice encourage educational organizations to market themselves in new and progressive ways to the communities they wish to serve. The above literature affirms the need to market educational programs, specifically in central Indiana. That said, there is little research on how that marketing (if any) is being done.

CHAPTER III: METHODOLOGY

Research Design

The purpose of this study was to examine the marketing practices of public and private schools in central Indiana. Also explored was the extent to which school choice initiatives in the state impacted school and district marketing decisions.

This study sought to answer the following research questions:

1. What are current marketing practices in central Indiana public and private schools?
2. What is the motivation to engage in school marketing?
3. In what ways do public and private school marketing practices differ from one another in central Indiana?
4. How do school officials (district or private school administrators) perceive that school choice initiatives have motivated marketing practices for their school or district?

A mixed-methods research design was selected, as it, “investigates a contemporary phenomenon (marketing in schools) in depth and within its real-world context” (Yin, 2014, p. 16). According to Creswell (2012), “Applied to research, mixed methods means that investigators can improve their inquiries by collecting and converging (or integrating) different kinds of data bearing on the same phenomenon” (p. 536).

A mixed-methods approach allows the researcher to triangulate the data (Creswell, 2012, p. 526) and, “forces the methods to share the same research questions, to collect complementary data, and to document counterpart analysis” (Yin, 2014, p. 65).

The state of Indiana was selected because it houses the largest school choice scholarship program in the United States. According to the Friedman Foundation (2016), 19.6% of students using vouchers nationally are in the state of Indiana. Also pervasive are school scholarship tax credits and private school/homeschool deductions.

Central Indiana was selected as the geographic setting for the research, and multiple schools/districts were identified for participation; ten public school districts, ten private schools, and five charter schools. All districts/schools incorporated in this central Indiana study employed a full time Public Relations/Marketing professional in 2017. This is not the case in many more rural districts. Smaller district may not have someone in the role at all, or may have designated related tasks around public relations to another district employee. Central Indiana also has the largest representative sample of traditional public, charter, and private/parochial school options.

Site & Participants

Prior to conducting the study, all procedures and protocols were reviewed and deemed exempt by the Institutional Review Board (IRB) at Indiana University Bloomington. The survey and interview data did not include identifiable information that could be damaging to subjects. Any documents collected were already in existence and publicly available.

A sample of twenty-five central Indiana district and building marketing professionals were identified through their websites. The sample consisted of ten public school marketing professionals, ten private school (parochial and secular) professionals, and five public charter school professionals. These cases were selected based on geographic location in central Indiana and school population. The geographic location was Marion County, Indiana, one corporation in Hamilton County, and private schools in Marion County that have an enrollment of 350 or more

students. Individuals identified were responsible for determining the marketing done for their organization. Public and private kindergarten programs were not included in the study because many early childhood programs incorporate kindergarten programming. Additionally, kindergarten is also not state-mandated. Indiana compulsory education laws do not require that a child attend school until the age of seven (Herron, 2017).

Survey Data

School/District marketing professionals were surveyed electronically through email using Qualtrics survey software about their district/school marketing initiatives, the rationale for marketing actions taken, and their perceptions of the school choice movement's impact on those actions. According to Yin (2014), survey data collection is, "advantageous when the research goal is to describe the incidence or prevalence of a phenomenon or when it is to be predictive about certain outcomes" (p. 10).

Superintendents/Building Leadership were contacted electronically from ten traditional public school districts, ten private schools, and five public charter schools regarding the intent to reach out to their public relations/marketing personnel on February 3, 2017. Leaders were assured in this communication that participant names would be kept confidential should they elect to participate in the study. Leadership was given one week to respond if they preferred not to have their organization participate. No emails were received by leadership opting out of the study. The correspondence to the district/building leaders is available in Appendix A. The survey used was developed by cross referencing the literature reviewed and the research questions at hand. The survey introduction and survey questions can be accessed in Appendix B.

All marketing professionals identified for participation in the survey received an initial electronic invitation to participate from the investigator on February 10, 2017, and provided the electronic survey link. A reminder email was sent one week later to those who had not yet completed the survey, and then a final reminder prior to the survey's close. Those identified had two weeks to complete it, and were assigned a unique respondent link. According to Dillman, Smythe & Christian (2014), a customized link or code allows the surveyor to keep track of who has responded and provides a way to ensure that the respondent only accesses the survey once. Additionally, respondents were able to stop the survey and complete it at a later time. Participants ultimately had eighteen days to complete the survey instead of fourteen, allowing one respondent to complete a survey that was started but not submitted.

At the end of the month of February, twelve surveys were completed. This group of twelve represents 48% of the educational institutions that were initially contacted for participation. Eight survey respondents were from traditional public school districts. Six of the seven were traditional public school districts in Marion County. The seventh was a traditional public school district located in Hamilton County. The eighth was a charter school network comprised of six schools in Center Township in Marion County. The remaining four survey respondents were from private parochial schools. Noticeably absent was the largest public school district in Marion County. Despite repeated attempts, they were non-responsive. Further information around of their absence will be discussed in Chapter V. Complete electronic survey results are available in Appendix D.

Interview Data

Interview was selected as a data collection method because, "we cannot observe behavior, feelings, or how people interpret the world around them" (Merriam, 2009, p. 88). Semi-structured

interviews were chosen because they, “allow the researcher to respond to the situation at hand, to the emerging worldview of the respondent, and to new ideas on the topic” (Merriam, 2009, p. 90). While Merriam’s (2009) views are supported by Creswell (2012), he adds the possibility that, “Interview data can be deceptive and provide the perspective the interviewee wants the researcher to hear (Creswell, 2012, p. 218).

Another rationale for interview was practicality. Participating professionals were the marketing experts for their organization. They lived the work. It was their responsibility to be advocates for, and to tell the story of, their organization. Their work and expertise provided both insight and legitimacy to the field of educational marketing. This legitimacy is also referenced in the conceptual framework in Chapter I, which, according to new institutional theory, is the most fundamental thing an organization seeks.

Those professionals who indicated willingness in the survey were invited to participate in a thirty to sixty-minute semi-structured phone or in person interview. The interview questions were similar to those in the electronic survey, but were more tailored to the work of the marketing professionals and rationale for the strategies they employed, concept development, and the impact of choice initiatives. If the interview was conducted in person, it was held in a comfortable and quiet environment of the interviewee’s choosing. Interviews were audiotaped by the researcher and later transcribed.

Discussed in the interviews was the rationale for the strategies the school marketing professionals employed, including concept development and the impact of choice initiatives when making decisions about marketing the program to their target audience. The recorded and transcribed interviews were reviewed to learn more about the different marketing tactics used by

schools and districts to both inform and attract the public. Interview questions can be accessed in Appendix C. Examples of these questions included: How is the effectiveness of a given marketing initiative measured? Where do you get your marketing ideas?

Eleven of the twelve survey respondents, or 92%, participated in the semi-structured interviews. Initially, a preliminary post-interview exploratory analysis occurred, consisting of, “exploring the data to obtain a general sense of the data, memoing ideas, thinking about the organization of the data, and considering if additional data is needed” (Creswell, 2012, p. 243). Transcripts were read a minimum of three times and transcripts were then labeled and organized, using coding, in order to identify recurrent themes. According to Creswell (2012), codes are, “labels used to describe a segment of a text or an image” (p. 244). In the case of this study, topics addressed included: Setting and Context, Perspectives held by participants, Participants’ way of thinking about people and objects, Processes, Activities, Strategies, and Relationship and Social Structure (Creswell, 2012).

This analysis and review led to a list of categories and concepts around similarities and differences between the eleven interviews. While the primary objective of the interviews was to answer the research questions, another theme around the use of vouchers emerged, which will be further discussed in Chapters IV and V.

Document Data

The marketing professionals interviewed were asked to share documents with the researcher that showcased the marketing efforts of their district or school. The terms artifacts and documents are used interchangeably in this study. Per Merriam (2009), “I have chosen the term document as the umbrella term to refer to a wide range of written, visual, digital, and physical material relevant to the study at hand” (p. 139). The term document is also used to encompass

materials accessed online. Documents collected helped the researcher to triangulate the data and support the themes that emerged in both the surveys and interviews.

Documents obtained from the marketing professionals were considered primary, in that they were, “those in which the originator of the document is recounting firsthand experience with the phenomenon of interest” (Merriam, 2009, p. 153). No secondary documents were obtained. Examples of documents collected included: Mailers, Annual Reports, View Books, Profile Sheets, Brand Standards, and Strategic Plans.

Analysis of the documents took place, where the nature of the content was assessed (Altheide, 1987). According to Altheide (1987), what makes this distinctive is, “the reflexive and highly interactive nature of the investigator, concepts, data collection and analysis... The investigator is continually central, although protocols may be used in later phases of the research... the aim is to be systematic and analytic, but not rigid” (p. 68). Documents were assessed with the following questions, developed by Merriam (2009, p. 151):

- What is the history and use of the document?
- What is the document creator trying to accomplish? Who is the intended audience?
- What is the maker’s bias?

With data from the survey, interviews, and documents, the data was triangulated with the objective of developing convergent evidence. According to Yin (2014), “By developing convergent evidence, data triangulation helps to strengthen the construct validity of your case study. The multiple sources of evidence essentially provide multiple measures of the same phenomenon” (p. 121).

While some marketing professionals provided more than others, all twelve participating districts/schools, or 100%, provided some type of document for review. Some provided far more than others, ranging from Strategic Plans, to Annual Reports, to mailers, and more. All have a correlation to their current position in the marketplace and to their allocated budgets. The six traditional public school district documents totaled twenty-seven. The public charter network provided four documents. Collectively, the private schools provided twenty-five documents. With the exception of two of the eight traditional public school exceptions, private schools engaged in more direct mail, though materials were also available digitally. Documents developed each have a specific purpose and utilize language specific to the audience they are attempting to reach. The documents, though of quality, provided little support answering the research questions in Chapter IV.

Documents are referenced when answering the research questions in Chapter IV and are included in Table 7, which shows the sources used to answer the research questions. A description of the documents received, an overview of the purpose of their production, and from whom they were received is provided below. Answers to the questions asked of the documents using the work of Merriam (2009) are also included.

View Books

Two private schools utilized “View Books”. A View Book is a printed promotional piece used for recruitment that uses imagery to entice the viewer to learn more about the organization. Two private institutions used this piece to provide a comprehensive overview of all they have to offer a prospective student/family. No traditional or charter public school provided a View Book.

As indicated by the professionals representing the organization, these books have been in place for a long time. As the digital realm of marketing continues to expand, one organization is

considering discontinuing the books in both print and digital form. One organization's marketing professional shared their bias towards the digital realm:

... I am promoting killing the View Book. I don't want to print it anymore. It is a very expensive piece. Every piece of information we have in there you could get from somewhere else. The new website we are getting this summer basically lays out our View Book in a much more graphic and beautiful way, and in a way which we paid a lot less for. It is also a piece we don't have to mail (MH, personal communication, March 23, 2017).

Profile Sheets

A public school district profile sheet was received six times. Though the information was incorporated in other publications or on district websites, these public school corporations had quick reference snapshots providing a broad overview of the district demographics for the general public. These sheets were fact-based and objective in nature, limiting opportunity for bias. While these profile sheets may be used for promotional purposes, they were not designed to be a strategic marketing piece. No private school provided a Profile Sheet.

Brand Standards

Two public school districts provided brand standards guidelines, more traditionally associated with corporate America. These brand standards exemplified the new age of school marketing in an area of choice. These two school districts have committed the largest dollar amounts (over \$101,000 annually) to marketing. The objective of these guidelines was to ensure consistency across all platforms where district identity or brand were involved. Though no private school provided branding information or a guide, brand usage guidelines were found on two private school websites on their athletic websites.

Strategic Plans

A publicly available strategic plan was provided on two occasions. By one traditional public school district and one private school. These plans were made available to the public both printed and electronically. Schools and districts understand that viability in a competitive market requires a vision and a plan. These materials were intended to inform the public of priority focus areas and plans. The objective was to portray a forward-thinking organization that is looking to the future, while remaining steadfast to the mission and vision. Opportunity for bias was limited, in that these objectives were developed for the future and deliverables were not yet available.

Advancement

Documents obtained that were specific to advancement were limited to private and public charter schools. The traditional public institutions in this study benefitted from educational foundations that handled all advancement responsibilities. Foundation funds supplement the money provided to the institution by the state and financially support extracurricular programming, teacher creativity grants, supplemental curricular materials, and serve as a fundraising depository for funds raised and allocate for special events like field trips.

The charter network marketing professional that participated in this study was charged with raising one million dollars annually, however, no specific examples of advancement materials were provided. One private school provided printouts of advancement emails that had gone out to current school families and alumni. Another hosted an annual gala, which was their largest fundraising activity of the calendar year.

Advancement documents focused on fundraising and donor engagement and featured the programs that benefit from philanthropy. Also included in these documents was information on

tax incentives and scholarship granting organizations (SGO). These documents were developed to entice their audience to take financial action supporting the organizational mission.

Indiana participates in the school scholarship tax credit program. Enacted by Indiana Code 6-3.1-30.5 and Indiana Code 20-51 in 2009, “Qualified scholarship-granting organizations (SGOs) will receive funding for scholarships, which will come from private, charitable donations. Those donors (individuals or corporations) who have donated to an SGO approved by the Department of Education will then be eligible to take advantage of a 50% credit against their individual or corporation state-tax liability” (Indiana Department of Revenue, 2016). Eligible parents can then apply for these scholarships to apply to approved SGO approved programs.

Annual Reports

Three Annual Reports were received. Two were received from traditional public school districts and one was received from a private school. All aimed to provide stakeholders with relevant information, as well as to highlight success. Though ranging in quality and design, they sought to provide a holistic representation to the public of what they had to offer. Introduction of key leadership, financial holdings, school information, board goals, and mission/vision were recurrent themes in all pieces. These were brag pieces, so only the best and most impactful information was highlighted. One district, one that takes pride in their diversity, elected to format their annual report like a picture book, telling the story of the experience a child could have as a student in their district.

Limitations

When conducting this study, there were multiple limitations that had to be taken in to consideration. The first was the potential for lack of applicability to states other than Indiana. As described in Chapter II, Indiana has one of sixteen voucher programs in the nation. Nationally, it

is the largest and most comprehensive (Friedman Foundation, 2016). Many other states do not house voucher programs. Within the state of Indiana, the location of the school must be considered, only because urban areas have a greater choice of educational options than their peers in more rural areas where there are fewer schools. While not a factor in this particular study, geography does play a role in school choice.

An additional limitation was the participants. In 2017, there are more public school districts and private schools in / Indiana that do not have a Public Relations/Marketing Professional than that do. This is due to geographic location, corporation/school size, and budget. This reaffirmed the selection of central Indiana as the geographic location for the study. As stated in the Competition and Educational Marketing section of the literature review, choice options in education are not equal, with urban areas having more schooling options than their rural counterparts, with fewer options and less access to transportation.

A possible limitation warranting consideration was a family's desire for their child to have a parochial education. If a family prioritizes a religious education for their child, the strategic marketing of public schools and their available programming is unlikely to change their mind. According to the Private School Review (2017), 79% of private schools in Indiana are religiously affiliated. Marketing materials would simply provide them with more specific information when making the educational decision.

Regardless of religious affiliation, a limitation of private schools was that they charge tuition fees. According to the Private School Review website, the average 2015-2016 tuition in the State of Indiana for private school tuition in a K-12 program was \$6,338. According to the United States Census Bureau (2013) during the 2012-2013 school year, the average per pupil

spending was \$9,566. It is important to remember this amount does not include ancillary services such as transportation.

The employment of the researcher provided some opportunity for insider perspective, also a possible limitation. The investigator was employed as a Coordinator of Communications, Public Relations, and Marketing in a large metropolitan Indiana school district. Therefore, the investigator already saw the impact of strategic marketing in a school district and was not viewing the topic as an outsider. This perspective was not so much a negative or something to be called into moral question, but rather a set of circumstances. This insider perspective is not the same as a conflict of interest. According to the Institute of Medicine (US) Roundtable on Environmental Health Sciences, Research, and Medicine (2009) the definition of a conflict of interest is that the "...person has primary interest that he or she needs to fulfill, although other interests may push or pull the person in different directions. A moral failure would be if the person neglected their primary interest and allowed these other interests to rule" (p. 37). Awareness of this was important as the research was conducted. Worthy of consideration also, was that this inside perspective provided potential for the investigator to make assumptions about the data or study participants.

The employment of the investigator was likely to positively influence access to educational leaders and professionals in the education and marketing arena. Existing relationships increased the likelihood of participation in the research. However, despite access, there was the possibility that private or charter school colleagues may have been reticent to share experiences or documents, viewing the investigator as competition.

Final limitations for consideration were the documents collected. These are artifacts that demonstrated the strategic marketing efforts of the different schools/corporations in the study. According to Merriam (2009), “Because documents are not produced for research purposes, the information they offer may not be in a form that is useful or understandable to the investigator” (p. 154). Documents collected were presented with clearly defined purposes for production.

Data Analysis

Analysis of the data is depicted in tables, figures, and narrative; to develop answers to the research questions (Creswell, 2012, p. 617). Table 7 maps out the data sources that were used to answer the research questions. While answers to the research questions are addressed individually, Table 7 represents an overview of data sources used to answer the four research questions that guided the study.

Table 7. Data Sources Used to Answer Research Questions

Question 1. What are the current marketing practices in central Indiana public and private schools?	Question 2. What is the motivation to engage in school marketing?	Question 3. In what ways do public and private school marketing practices differ from one another?	Question 4. How do school officials perceive that school choice initiatives have motivated marketing practices for their school or district?
Survey Question #12	Survey Question #2	Survey Question #6	Survey Question # 2
Interview Question #1	Survey Question #14	Survey Question #12	Survey Question #15
Interview Question #3	Survey Question #15	Survey Question #13	Interview Question #6
Interview Question #7	Survey Question #16	Survey Question #15	
Document Collection	Interview Question #6	Interview Question #5	Analysis of Question 4:
		Interview Question #6	
Analysis of Question 1:	Analysis of Question 2:	Interview Question #7	Interview Transcript Coding
		Document Collection	Survey Data Review
Interview Transcript Coding	Interview Transcript Coding		
Survey Data Review	Survey Data Review	Analysis of Question 3:	
Document Questioning			
		Document Questioning	
		Coding	
		Survey Data Review	

CHAPTER IV: RESULTS

Marketing Function Within Schools

Despite this study's focus on the differences in marketing practices, across all interviews, there were similarities of note that were shared in the interviews. These similarities occurred regardless of differences in job descriptions. All professionals interviewed reported directly to the head of the institution, be it the President of the School, Chief Executive Officer, or Superintendent of Schools. All reported maintaining a close working relationship with that individual. Participants shared that the leader was the primary contact for idea sharing, project development, and budgeting. Participating school marketing professionals also served as the chief point of contact for external media relations, with two public school participants identified as the Public Information Officer for their corporations.

In the interviews, professionals shared that the school communications, public relations, or marketing role is very much a catchall position. According to one professional, "I don't think most people come in to school public relations having this full background in any one thing. You are either (kind of) from media or you are from schools" (ML, personal communication, March 1, 2017). There were facets of the job that everyone had to learn. Those in education may not know much about strategic marketing, while someone with a mass communications degree likely has little knowledge of school operations. Interviews revealed professional backgrounds in broadcast journalism, mass communications, development/advancement, school administration, advertising, public relations, secondary education, and history. For participants in the study, the school marketing position was more of a right fit than a planned career track.

The consensus was that the workday activities and hours of a school marketing professional are anything but uniform. With the myriad of responsibilities that accompany this

role, professionals have to proactively communicate with their public, but be prepared to deal with unforeseen circumstances that can arise at any time when working in an industry centered around people. According to one public school district professional, “My day can swing wildly from a crisis that comes up, to everything that is mundane in terms of speech writing and going back and forth with the superintendent on drafts” (BS, personal communication, March 21, 2017). Social media, specifically Facebook and Twitter, stood out as a priority in both the survey and interview data, and represented another area of significant time and possible financial investment.

Advancement came up as an added responsibility of both private school and public charter professionals. For the purpose of this study, advancement and development were interchangeable terms. They referred to the responsibility of the professional to raise vital funds for the organization through the cultivation of relationships that are imperative to supporting the school/district plan, or vision.

All participating private and charter school professionals shouldered responsibility in the areas of both student recruitment and enrollment. This included giving tours and providing information to prospective families and meeting with prospective donors as part of their annual fundraising campaigns. Two private school interviewees spoke to the value of a relationship-focused approach to those tours. One private school participant spoke to going so far as to remembering specific questions asked, and using that information to refine the school’s messaging for subsequent open houses and tours. Another private school professional moved away from open houses and only schedules tours one-on-one, stating that, “Typically if you do an open house, they are going to want to come back and do a tour anyways. So I’d rather spend the time with them upfront” (AW, personal communication, March 9, 2017). Documents, including

the View Books and annual reports, supported those recruitment efforts and were put in the hands of attending families.

Shared repeatedly in the interviews with private school professionals was the emphasis that prospective families placed on having a personalized experience. This type of experience refers to one that is built on personal connections and relationships. It was also an area of focus for families that the private school professionals described as devaluing the data-centered marketing documents they provided, as well as the strategic messaging that they regularly incorporate in their social media boosted posts and ads. As education is still a profession of developing and supporting children, study participants had the challenge of balancing authentic celebrations with strategic branded marketing content.

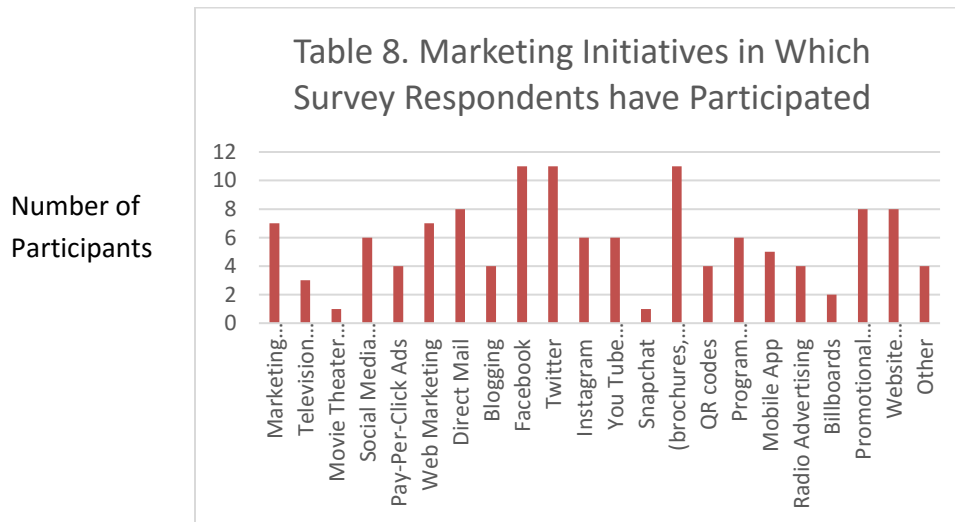
Of interest, is that specific areas of focus that participating professionals believed to be of significant value in marketing their school or program was not necessarily what they perceived their audience viewed as important. Private school professionals reported that the families they served were not interested in fancy graphics depicting data in formal reports, or in professional stock images of students. Prospective and current private school families were interested in authentic pictures of real students from their school. Families wanted to be served positive information about individuals that they know and with whom they have relationships. They wanted to be provided with practical or promotional information only when it was something that they truly needed to know, and preferred that regular communication center around celebrating the successes of students and the larger school community. These sentiments around communication centered on the success of the school community are consistent with the above referenced desire for a more personalized experience. The personal experience was perceived by

participating private school professionals as a marketable concept, and one that they were working diligently to capitalize on.

Answers to Research Questions

Research Question 1. What are current marketing initiatives in central Indiana public and private schools?

Survey, interview, and the document data revealed a variety of strategies used by participating professionals to market traditional public school districts, public charter schools, and private parochial schools, all with an emphasis on the digital realm. Table 8 shows participant responses to survey question two, which inquires as to the types of marketing initiatives in which the public and private school have engaged in the past calendar year.



Consistently, the regular use of digital media was perceived as paramount. Up to date websites were considered by participants to be non-negotiable, with 100% of the organizations having a comprehensive website. One professional referred to his/her organization's website as the front door of the organization, or the first place current or prospective families go when

wanting information. Additionally, all participants engaged regularly in some type of social media, with 11 of the 12 participants (91.67%) using both Facebook and Twitter almost daily. In the case of one private school, a designated person was hired only for social media. The real time, all the time, information that social media provides was perceived as a powerful tool to reach students, parents, and community stakeholders, often using multiple platforms. Social media platforms referenced in this study were Facebook, Twitter, Instagram, YouTube, and Snap Chat.

Increased value was placed on the organization's digital footprint, and social media was perceived as being of paramount importance in those efforts. As one public school district professional stated, "As trends emerge, we follow them. Our parents are on Facebook. Our students are on Instagram and Snap Chat. The larger community is on Twitter. We have to meet people where they are" (DA, personal communication, April 14, 2017).

Four organizations (33.3%) comprised of one traditional public school district and three private schools indicated in their survey responses that they used Instagram and one private organization (8.33%) indicated the use of Snap Chat as a part of their marketing efforts in their survey responses. These two platforms have a high utilization with students from Generation Z, causing them to be perceived as a more effective tool than Facebook for Twitter to reach the K-12 student population. Generation Z is defined by Forbes Magazine (2017) as the generation born between 1995 and 2010.

For the professionals in this study, social media provided a powerful tool for reaching a larger audience that might not be likely to seek out organizational information on their own. According to John Lyon of Forbes Magazine (2017), publishers have seen a 52% decline in organic (non- sponsored) reach on Facebook due to the volume of content and the Facebook algorithm where only the content most relevant to its members is displayed.

The prevalence of print marketing was 91.67% (11 of the 12 participants). This was a surprise, given the responses of interviewees, about viewing print as becoming increasingly obsolete. This may be attributed to several factors: In the case of the participating public schools, it was imperative that they reach the community at-large, given the connection between communities and public schools. In thinking about prevalence of referenda, it is increasingly important that all stakeholders be informed about what was going on in their public schools. Additionally, public school perceptions can directly impact the market value of homes within the district. Community mailers were perceived by participating public school professionals as something that could still communicate important messages to the broader community. According to one public school professional:

Just realize that there is a very high percentage of families that live in (school district) that don't have children that attend (school district) just because they simply have grown out of the system. So to be able to tell them that strong schools lead to a strong community and that your tax rates are so low because of a strong economy that has been created within the community is a powerful message" (CT, personal communication, February 28, 2017).

It is likely that print materials are not becoming obsolete, so much as marketing professionals are putting less time and emphasis on them as they assumed more responsibility in the digital marketing realm. One traditional public school marketing professional talked about meeting families where they are. Some were more receptive to engagement in the digital realm, while others remained more comfortable with traditional means of communication using paper.

Documents provided by participants that were professionally printed pieces included view books, annual reports, and strategic plans. Documents reviewed were also available for review on

the organization's websites, though they had been professionally printed, incurring additional cost. While profile sheets were housed on the website, they were available as an 8.5 x 11 full color download for printing. While of interest to the researcher, these physical documents did not contribute substantially to the ability of the researcher to answer the study questions.

Research Question 2. What is the motivation to engage in school marketing?

To attract students to their respective organization, schools/districts had to market their offerings to the community. Despite their varied approaches to reach current and prospective students, the messaging does not change what the organization truly has to offer a family with regard to curriculum, extracurricular offerings, facilities, etc. The marketing refers only to the vehicle for communication and the strategies that schools employ to positively influence perception around the program and to communicate offerings to potential customers.

For the survey respondents, eleven out of twelve (91.67%) believed that marketing was an integral part of sharing the institution's vision and mission with the broader community. To quote one public school district professional, "If we don't tell our story, it will be told for us" (DA, personal communication, April 14, 2017). For eight of the twelve respondents (66.6%), program enrollment was dependent on school marketing. In the survey results, seven of the twelve respondents (58.33%) believed that school choice had encouraged the organization to market in new and innovative ways. Motivation to engage in school marketing came down to communicating vision and mission, recruitment, and advancement.

For the traditional public schools in this study, motivation stemmed around remaining a strong contender in the educational arena as school choice initiatives continue to grow and expand in Indiana. When addressing this second research question, it was important to keep in mind that school funding in Indiana is per-pupil, with the money following the student. With funding tied to

enrollment, losing several students means losing thousands of dollars. “There are other entities out there that can do what you do, so you have to become sharper,” says one public school professional, “Not just in putting out your message, but really making sure that you are who you say you are on a day-to-day basis. It has been a real wakeup call” (BR, personal conversation, March 21, 2017). Overwhelmingly, participants perceived value in telling the district’s story. If the traditional public district did not tell the story of happenings and initiatives, it would be told for them, and possibly framed in a negative light. Public school districts saw a value and importance of controlling the narrative by proactively telling their own story to both their internal (students and staff) and external (district residents, area businesses, larger community) publics.

While the participating public charter network did place value on recruitment, their interview revealed a strong focus on building community support and partnerships, with the hope that corresponding funding for programming (advancement) would follow. The title of the charter network professional interviewed was Chief Development Officer and Director of External Relations. With this title came the task of raising one million dollars annually. When asked where the most time is spent when marketing the program, the following answer was given:

I am looking to meet with individuals. I am looking to meet with companies. I am looking to meet with foundations. I mean, my goal is to get in as many tours at our schools as possible. People don’t truly understand what we are about until they see us in action” (JO, personal communication, March 27, 2017).

These tours were less about student recruitment and more about program advancement.

For private schools, marketing was focused on both recruitment and advancement. Recruitment emphasized educating prospective families as to the institutional mission, vision and offerings. According to one private parochial school professional:

Once a month, I have a list of families that are not properly educated about the type of institution that we are, and I will email them and call them and meet with them whenever and wherever they will meet with me. I will spend the time necessary to teach them, to answer their questions, and to correct the wrong information and fallacies they have about (school name). Because I believe that has impact on the overall school. We are not recruiting thousands of students. We are in the business of hundreds. So losing five families is a big deal. If those five families have an inaccurate understanding of who we are, that is not great, and so I believe in spending as much time doing that as I can (MH, personal conversation, March 23, 2017).

In the advancement realm, another private parochial school professional talked about to the “two-fold challenge” to those in this position in education:

I have to raise about a million dollars a year. That is over and above everything else that happens with our fee and admission structure. But everything I do also has to be focused on getting prospective families in the door. So, if I raise five million dollars in cash for the school but our enrollment drops ten families, that is not real success. They have to be hand and glove. There can't be an overemphasis in one area over another (GR, personal communication, March 14, 2017).

In an era of school choice, traditional public, public charter, and private schools are in direct competition with one another. Though the concept of education as a business is a contested idea, in order to achieve the organization's mission and vision of educating and ultimately graduating students, schools must be able to finance their programming. Funding comes from having and retaining enrolled students.

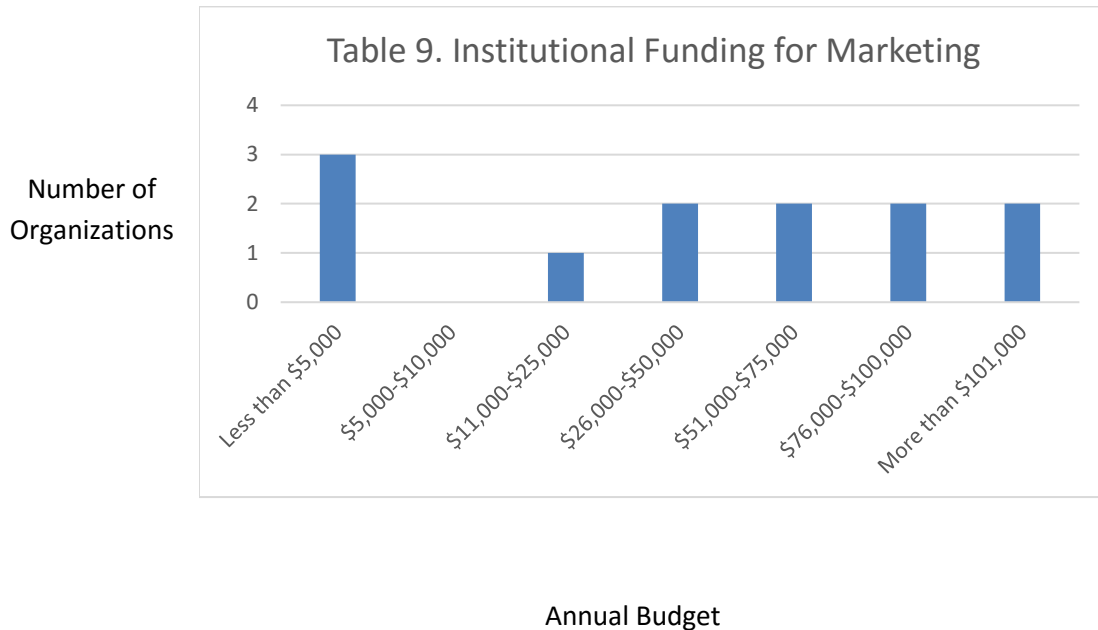
Public and private schools must define themselves before being defined by someone else. They must tell their own story and share information using a variety of mediums, all of which seek to positively impact the perception of the district or school, thus increasing their legitimacy and the likelihood of families electing to participate in their program.

Question 3. In what ways do public and private school marketing practices differ from one another in central Indiana?

All of the participants in this study were directly responsible for the marketing of their program, providing the opportunity for overlap in some of their roles and responsibilities. While there were some similarities, addressed in the data analysis section of this chapter, several marked differences emerged with regard to marketing practices. Differences that distinguished themselves and that were recurrent across the surveys and interviews included budget, advancement, and competition.

Budget

Survey data collected from participants revealed that one of the most significant differences in marketing practices between organizations was in the annual budgets allocated for program marketing. Dollar amounts allocated annually for school marketing initiatives ranged from less than \$5,000 in three traditional public school districts to over \$101,000 for two other traditional public school districts. This is a difference of at least \$96,000 annually. Private school investment in marketing also varied greatly, with survey responses ranging between the \$11,000-\$25,000 category and the \$76,000-\$100,000 category. These responses reflect a difference of \$51,000 annually. Table 9 shows the survey responses for the institutional funding allocated to marketing during the 2016-2017 school year for all study participants.



Despite all participating professionals seeing the value of school marketing, schools were limited by the budgets allocated to them. Public schools have a responsibility to be good stewards of the money provided to them by the state. The traditional public school districts that participated in this study operated with annual budgets well over \$100 million. Despite their large budgets, those dollars are strictly allocated for specific purposes and held in different funds. These include the General Fund, Debt Service Fund, Capital Projects Fund, Transportation Fund, Bus Replacement Fund, and Rainy Day Funds. These cannot be used interchangeably or spent on a need that is funded outside of that particular budget. School marketing funds come from the General Fund, the largest portion of which is used to pay staff salaries.

One of the public school marketing professionals interviewed shared that a lack of knowledge around school finance on the part of stakeholders sometimes resulted in misplaced frustration from families around district spending. As an example, if students in a traditional public school are in a class of 35 students and the district is spending over \$100,000 annually on

marketing, community members and parents may argue as to why those dollars allocated for marketing are not going directly in to the classroom to support staffing to reduce the staff to student ratio.

Discussion around the varied financial investment in school marketing provided an opportunity to further elaborate on the contested idea of education as a business. With per pupil funding, traditional public schools have no choice but to assign monetary value to their enrollment.

Advancement

Advancement, synonymous with development, was another area of significant difference. Participating public charter and private school marketing professionals all had advancement tied to their job responsibilities. For the private schools, money comes from tuition and related fees, which are inclusive of voucher dollars. Public charters get all their money from enrollment. This supports all aspects of the programs, from staffing, to curriculum, to extracurricular, to the educational facility.

The public charter network professional spoke in her interview about the need to find individuals willing to underwrite academic initiatives like dual credit, to eliminate passing financial burden on to students and families. She shared that putting that financial burden on the families they serve would be contradictory to the organization's mission.

A private school marketing professional shared the following with regard to the importance of fundraising for their organization:

The fundraising is so incredibly important because it is how we can build up financial assistance. It is important to remember that even with school choice dollars, the private school experience is not free. There is always money needed

for extracurricular activities, for clubs, for trips, for the experience of being in this environment. And so the challenge is to raise more money on the financial assistance side so that we can help mid-market families, or those requiring financial assistance, while preserving who we are as a school (GR, personal communication, March 14, 2017).

This particular school was always looking for full pay families, as these families can help to offset the cost of the programming they provide. Businesses and corporations were also of interest to help offset costs and to provide tuition assistance to qualifying families.

Advancement was an arena that traditional public school marketing professionals did enter as a part of their professional responsibilities. This is because all of the traditional public institutions that participated in this study each benefitted from an educational foundation (501c3 organizations) that handled advancement initiatives specifically for their district. These educational foundations have become increasingly important in the state of Indiana following the passing of the property tax caps in 2008, where the total tax against a residential dwelling can be no more than 1% of its assessed valuation. These foundations work diligently to raise funds that supplement school and teacher sponsored programs that are not supported by tax dollars. Clay, Hughes, Seeley, and Thayer (1985) define educational foundations as “privately operated, nonprofit organizations established to assist public schools” and who qualify as charitable organizations.

Competition

Participants in the study identified different target groups they were attempting to reach and influence with their marketing initiatives. Traditional public schools were seeking to reach district residents, both with and without children enrolled in their schools. The public charter

network was attempting to reach parents in zip codes with underperforming schools. Private schools were interested in the citywide name recognition and in targeting prospective families.

When asked what population, if applicable, the organization was targeting with marketing efforts, the following open ended responses were received:

- Citizens within our district boundaries (Public School District)
- Parents in certain zip codes with underperforming public school choices (Public Charter School Network)
- Parents, Prospective Parents, & Community Members (Public School District)
- Adults/Families (Public School District)
- Greater Indianapolis and surrounding suburbs (Private School)
- Parents & Community (Public School District)
- Private School Attendees (Public School District)

In 2013, the city of Indianapolis adopted Indiana House Bill 1381, opening school boundaries and allowing for students to attend a school corporation outside of their district of legal settlement if the receiving corporation had the capacity to accept them. Provision of student transportation is not a requirement of this bill. Despite these open boundaries, the traditional public school districts represented in this study focused on the community that resided within their geographic boundary, sometimes expanding slightly beyond, generally by the zip code of residence. The public charter network sought out families in areas served by underperforming public schools in hopes to be seen as a better educational option for their children. In the case of the public charter network interviewed, the district from which most students were recruited is the traditional public school district in which they are geographically located. It is also the largest public school district in Marion County and thus perceived as being their primary competition.

The increasingly unrestricted competition for students that participants reported, coupled with expanded pathways to obtaining a voucher and inter-district choice, support the free market education system concept envisioned by Milton Friedman. Worthy of mention, especially in the case of charter schools attempting to lure students from underperforming public schools, is that market competition in education might yield increased choice, but not necessarily better educational outcomes.

Question 4. How do school officials (district or private school administrators) perceive that school choice initiatives have motivated marketing practices for their school or district?

There was little question that school choice initiatives had changed the educational playing field for schools/districts. That said, participants reported mixed responses on the perceived impact of school choice initiatives on marketing practices. These responses ranged from little to no impact on marketing, to a multi-year Board of Education directed focus on district branding and marketing.

While school choice initiatives, like the voucher program, have increased accessibility to private institutions, they do not guarantee admittance, nor do they lessen the burden on the school budget. As stated in Chapter II, the average unadjusted per pupil expenditure in Indiana during the 2012-2013 school year was \$10,268 (National Center for Educational Statistics, 2016), allowing low and middle-income families to use up to 90% of their allocated dollars from the sending school district to pay the tuition at the qualifying private institution. In the case of the institutions included in this study, voucher funds were not sufficient to cover tuition or any additional expenses and extracurricular fees. It was the tuition dollars from the full pay private school families that helped to offset the financial aid needs and initiatives of those organizations. One private school professional stated:

It [school choice initiatives] hasn't had that much of an impact in terms of where the marketing dollars are spent. We are always looking for full pay families.

Families who can pay for what is going on here. Businesses, corporations, and families, as well. The fundraising becomes so important because it is how we can build up financial assistance. Because even with school choice dollars, the private school experience is not free. There is always money needed for extracurricular, for activities, for trips, just the experience of being in this environment. And so the challenge is to raise more money on the financial assistance side so that we can help mid-market families or those with appropriate financial assistance, while preserving who we are. So it actually hasn't changed too much, because there has been a target of higher middle-income families, and the word is out everywhere. Especially with the use of social media. But we find that the opportunities of school choice market themselves. So as we analyze the data and the metrics, we don't have a problem getting our school choice families to be aware of us as an option. So whether our reputation precedes us or they are looking for a change for their children, they are coming to the door and we are aware of that (GR, personal conversation, March 14, 2017).

Participation in the voucher program, not as a resource to expand educational options, but as a marketing tool, proved to be a difficult sell for participating private schools. One private school in this study has elected not to accept voucher dollars at all, citing varied levels of student readiness and a "negatively impacted school culture" in some of their sister schools upon acceptance of vouchers (AW, personal communication, March 9, 2017). Another participating private school accepted them, but perceived their impact on the school marketing as being

minimal. The private school then went so far as to offer that vouchers had not come up in a single admissions event during the 2016-2017 school year, despite the information being readily available on their website. Though never explicitly stated, worthy of consideration is if these private institutions are subliminally marketing to the full pay family over those requiring tuition assistance in order to offset the true cost of their educational program.

According to the Indiana Department of Education (2017), 57 private schools in Indianapolis, Indiana and two private schools in the northern suburb of Fishers, Indiana accepted vouchers during the 2016-2017 school year. This number is not inclusive of all of the private institutions in the city. An example is the one private school that participated in this study that has opted out of participation in the voucher program, despite being centrally located in an area rich with both students and with school choice options. This suggests that the school desires a certain type of student. Students in their program likely meet predetermined criteria around race, social class, and academic ability.

One of the perks of being an independent school is that you narrow the margin of abilities in the classroom. And I'm certainly not assuming that just because your child is getting a voucher, that they are not within that range, but we have found that sometimes, well, often times, they are coming from failing schools and so perhaps they haven't been exposed to curriculum or to quality teachers or what not. So people will look to us to have a smaller class size with a narrower margin of ability. Because they think that perhaps the voucher system isn't positively affecting their current school, because perhaps the school doesn't have the resources to meet the needs of the children who they are accepting that might come

in at different grade levels in reading or math (AW, personal communication, March 9, 2017).

Despite non-participation in the voucher program, the institution above is aware of the number of choices that families have, and seeks a personal connection and experience for families to whom they are marketing their program.

For traditional public schools, school choice initiatives like the voucher program have resulted in substantial shifts in behavior regarding educational marketing. As educational options available to families expand, so must the intentional communication and marketing of public education. Districts want to be seen as a great educational option, and in some cases feel that the deck is “stacked against us” with the prevalence of school choice in the state (ML, personal conversation, March 1, 2017).

Of the seven traditional public school district respondents, four districts (57%) agreed with the statement that they have expanded their marketing efforts as a result of school choice initiatives. One district (14%) was neutral on expansion of their efforts, and two districts (29%) disagreed with the statement. Of note is that one of the districts that disagreed that they had expanded their marketing efforts was a relatively homogeneous and high-achieving school district in an affluent northern community. This traditional public school district communicated a heavy reliance on grassroots efforts, parent involvement, and local organizations, stating, “In [organization high school name] you’re the top school. There really is not a competing school with the accomplishments that our district has” (CT, personal communication, February 28, 2017). The district’s public relations and marketing professional’s target audience were not current and prospective families. They were local businesses, the local Chamber of Commerce, and realtors who work with families looking to relocate to central Indiana. The other public

school district professional that disagreed was just entering the school marketing arena as the newly hired public relations and marketing director under an interim superintendent, and had yet to develop a course of action and strategic plan for her new role.

The responses provided by participants suggested that socio-economics played a very important role in district marketing efforts of participants. The private schools that participated, largely accepting of vouchers with one exception, overwhelmingly placed an emphasis on the value of full pay families. Traditional public school districts reported strategically marketing to those families that by virtue of their socio-economic status, have more school choice. With expanded pathways to obtaining a voucher, this is a larger group of students than ever before. Traditional public schools want to keep those students in their program and prevent them from opting to attend one of the private school competitors. The public charter network was on the opposite end of the spectrum from the traditional public schools, strategically marketing to families in zip codes with underperforming schools. In central Indiana, those zip codes largely correlated to areas of high poverty.

Beyond school choice initiatives that impact recruitment of new students is the impact of these initiatives on retention. Choice leads to more choice. As students in a high performing charter school network matriculate from middle to high school, they are inundated with materials from other public charter and private high schools. To quote the participating charter network marketing professional:

While that is a compliment to us, because we are preparing kids who are the caliber of student that they (private schools) want, it is a little hard to swallow. These are the cream of the crop of our kids and they are deliberately marketing towards these kids. And we know that they are looking to diversify their schools.

So, what it does for us is, we have to be proactive in how we market to our 8th graders and the things that we can do internally to keep them at [organization name] (JO, personal communication, March 27, 2017).

Consistent among the responses was that students no longer just show up to their neighborhood public or private school. All schools now must be proactive in communicating their message, telling their story, and sharing what they have to offer, both in and out of the classroom, with their target audience.

CHAPTER V: DISCUSSION, IMPLICATIONS, & CONCLUSION

Discussion

Results of this study yielded evidence of an open playing field in the realm of educational marketing, with approaches varying across participating educational institutions; traditional public, public charter, and private. All sought to be perceived as legitimate by the outside world. Increased choice has created a larger educational institution, and therefore an increased need for school marketing.

Public school district communications and public relations have been in existence in the United States for a long time, with the objective of maintaining mutually beneficial relationships between the school district and the many stakeholders it serves. This was before school performance data were made publicly available and the advent of school choice initiatives in the state of Indiana. As legislation has changed and school accountability measures have evolved, the role of public school communications and public relations has had to do the same. Early on, many public school corporations did not have a full time professional in this role, with responsibilities pertaining to school communications and public relations handled by human resources, the superintendent, or other designee.

School communications and public relations became a full time job around the time Indiana passed school accountability legislation. Background on school accountability legislation is as follows:

In 1999, the General Assembly passed Public Law 221-1999, which created a performance-based accountability system. In response to this legislation, the State Board, Department and Education Roundtable collaborated over the next two years to establish the administrative rules outlining the accountability system. These

rules were finalized and in place by the end of 2001. Schools were labeled as “exemplary progress”, “commendable progress”, “academic progress”, “academic watch”, or “academic probation” under this accountability system. Schools were placed in one of these categories for the first time following the 2004-2005 school year. In 2011, the State Board adopted a rule to overhaul the accountability system. This overhaul aimed to separate adequate yearly progress (AYP) from state accountability; revise the criteria used to place schools in accountability categories; and assign categories based on an A-F grading system (History of Indiana’s Accountability System, 2017).

School leaders faced new pressure of school accountability, but needed to focus daily efforts on instructional improvement to achieve school and student success (Cooley and Shen, 2003).

Indiana was one of the later states in the country to adopt a comprehensive accountability system. However, once school performance data became publicly available, perceptions of schools were impacted, positively or negatively, depending on their designation. The public relations job became more significant, as this person was now responsible for communicating both school information and accountability performance data to the public. This involved contextual messaging and framing of the data to protect both the image and the integrity of the school or district.

Today, it would be hard to find an urban or suburban traditional public school district that doesn’t have someone in this role. Rural areas, depending on their budgets, may or may not be able to fund a full time position and may still have these responsibilities tied to another

professional. This newer school public relations professional role is one that emphasizes school marketing in addition to communications and public relations responsibilities. This begs the question, would public relations and marketing positions in education ever have come in to existence if not for public school accountability legislation? Would a dedicated professional who, “mediates the meanings and consumption of information by the public for the benefit of the organization (Schoenberger-Orgad, 2008) be needed?

Findings of this study support the idea that education is now in the highly competitive environment of recruiting, retaining, educating, and ultimately graduating students. Without students, schools and districts lose valuable funding. Traditional public school districts in central Indiana have never before been faced with the growing number of options that families have for educating their students. From charter schools, to open borders and increased access to voucher dollars, traditional public districts had to be proactive in communicating with the communities they serve and establishing themselves as a viable option in an open educational market. Private schools continue to market to prospective families, ideally full pay, while taking advantage of the voucher dollars available to them by the state. Public charter schools have capitalized on school choice, marketing their offerings to families in poor performing schools to recruit, and ideally retain, those students in their program.

A strong emphasis was placed on budget and finance by the professionals that participated in the study. While individual student outcomes may be dependent on curriculum and instruction, the financial impact of school choice on the organizations participating in this study was too large to ignore. With the money following the child, every student counts towards the organization’s bottom line.

As indicated in Chapter IV, there was a great deal of variability in the financial investment that participating schools and districts made in marketing their program. Programs with lower marketing budgets may have a vision for marketing their program that exceeds their peers. However, due to financial constraint, their vision does not connect to practice. They may acknowledge the value and effectiveness of engaging in a particular strategy, but do not have the budget to accommodate it.

Despite the differences in their financial investment in program marketing, every study participant saw the value of advocacy for their program. Participating organizations sought name recognition with the broader community, further establishing the brand of their organization. This branding is defined by Speak and McNally (2011) as, “a perception or emotion maintained by a buyer (stakeholder), describing the experience related to doing business with an organization or consuming its products or services” (p. 7).

It is important to recognize that program advocacy is not always synonymous with financial investment and does not always have a price tag. Vested stakeholders (staff, students, families) can have a tremendous impact on program perception, positive or negative. Beyond strategic marketing campaigns, how do these people talk about their schools with one another and with the larger public?

According to Bushaw, W.J., & McNee, J.A. (2009), media is the least influential source of information about schools, and school employees rank as the number one influencer of impressions about schools. This assertion supports the personalized experience referenced repeatedly by private school marketing professionals. Staff retention is another area that warrants consideration. Does the organization have a group of dedicated and committed professionals? Are

they committed to the organization? Are they brand ambassadors and sharing the positive? If so, that organic advocacy is priceless. As shared by a public school marketing professional:

I feel so strongly that for schools, it is so important for districts to have someone who is thinking about this. I mean, whether it is a dedicated person, and I think that is really preferable if it can be... or else someone else in the district. I don't think you can survive as a large district anymore without thinking this way. And it is really, when you start to think about branding, and what the district should be doing together with marketing, a very unifying thing. It's not just external, it's internal. You know, when you start talking to your staff about being brand ambassadors. Think about the conversations that you have with your parents or in the grocery line. How are you talking about your schools (ML, personal communication, March 1, 2017)?

Results showed that traditional public, public charter, and private, saw the value of telling their organization's story, particularly their vision and mission using the digital environment. Through a variety of strategies and mediums, they attempted to appeal to their target audience. Be it for recruitment, advancement, retention, awareness, et cetera, schools saw that they could not afford to be excluded from the educational conversation in an era of school choice.

Approximately fifteen years ago, social media began as a cost-free platform with grassroots networking intentions for students and professionals. Since that time, it has quickly become a multi-billion-dollar business where any user can invest money in sharing and promoting the message of their organization with target audiences. Posts to Facebook and Twitter can be boosted for more impressions (views) by followers and ad content can be generated and served to target audiences. The amount of money invested in these promotions is entirely at the discretion

of the advertiser. Ad development involves identifying key audiences who can be targeted by age, gender, geographic location, and areas of interests. Using these ads (sponsored posts), schools can digitally promote celebrations, community open houses, graduations, and other relevant content to the audience of their choosing. The rationale behind social media ads and boosted posts is that by making an investment is what professionals perceive to be their most impactful social media messages, they optimize the likelihood that their content is seen.

Private high schools do not have a traditional feeder system in place like K-12 public school districts, so social media advertising would be beneficial to them in increasing the likelihood that their target audience is aware of their initiatives. An example would be an annual open house. They may run a sixty-day campaign leading up to the event where they target females in their forties (likely mothers) that live in certain zip codes, and whom enjoy and engage with certain types of content. Simultaneously, they may boost their open house event to all that follow their school Facebook page and to those followers' connections on social media. By taking these steps, they have proactively served the content of their choosing to their predetermined target audience for purposes of recruitment.

The term recruitment, though specific to student recruitment for this study, has broader implications. The state of Indiana is experiencing a teacher shortage. Though not the purpose of this study, it warrants discussion, as fewer young professionals are entering the field of education, despite a continued demand. Attributed to this teacher shortage is both the pay scale and the demeaning of education as a profession. Citing aggressive reforms and a continued emphasis on standardized testing, one central Indiana public school superintendent shared with newspaper, the Indianapolis Star, "The fact remains that we across the state are struggling to recruit teachers into

the profession and to make sure spots are filled when the school year begins. We have made teaching not very attractive to go in to as a profession” (Schneider, 2015).

This statewide teacher shortage could ultimately result in schools and districts expanding the roles and responsibilities of their marketing professionals even further to include strategies aimed at recruiting teachers. This secondary marketing campaign would require schools and districts to reach well beyond local and in-state schools of education, and to market themselves potentially across the country. This marketing would not revolve solely on the schools and their program offerings, but would have to encompass selling the larger community as an attractive and vibrant place to live and work. The value of this type of strategy was affirmed in Chapter II by Pfeiffer & Dunlap (1988), when they discuss the need to market/advertise and ultimately to influence the entire community within the context of a family relocation. If the marketing objective is to recruit teachers, the campaign, in collaboration with the Human Resources department, would need to extend its target market well outside of the residential boundary of prospective students and families that school or district seeks to serve.

Worthy of consideration when marketing an organization in an attempt to recruit teachers are the changing demographics of the larger community. According to the Indiana Business Research Center at the Indiana University Kelley School of Business, Indiana’s population has become increasingly diverse in terms of race and origin, with more than 10% of the population of Marion County, Indiana identifying as Hispanic (Strange, 2013). Data from the Indiana Department of Education Compass website indicates that during the 2016-2017 school year, there were 50,677 English Language Learners enrolled in Indiana public schools (Indiana Department of Education, 2017). An increase in non-native English speaking students requires an increase in

bilingual certified and classified professionals. These shifting community and student demographics support a geographically expanded market for both student and teacher recruitment.

Educational marketing translates to the consumer's perception of the product, affirming that perception is, in fact, reality. While perception may be reality, perception is not a fixed state. It can be changed and is reflective of a person's psychological state (Witt & Proffitt, 2007). It is also tied to race and social class. Educational marketing in the K-12 arena is a new enough venture that the professionals who participated in this study were regularly watching and learning from one another, while considering their target markets/demographics. Watching trends in higher education was another avenue for garnering insight. In 2006, Hemsley-Brown & Oplatka determined in a study of higher education marketing that, "higher education is not a product, but a service, and the marketing of services is sufficiently different from the marketing of products" (p. 319).

A key to effective marketing, is that education is a people based industry, placing emphasis on relationships. If the students and their families are the potential customers, what is the best way to communicate with them? According to one private school professional, "The rules of engagement are very loose (GR, personal communication, March 14, 2017). This participating peer group acknowledged one another as competition looking for space in the same marketing arena. The professionals responsible for these initiatives saw the value of their work and its translation to their organization's success. They recognized the impact of their efforts on community perception of their program in an era of school choice, which translated directly to recruitment and the possibility of enrollment growth or decline.

Not included in this study was a comparison of school marketing to the marketing of the private, for profit sector. Businesses want to generate customers and to make money. The private

sector measures their success by their profits. Two competing companies offering the same product at the same price point are seemingly not that different. Their respective marketing aims to build both brand recognition and loyalty. They are selling an idea, a feeling and an experience, all of which create meaning for the consumer and influence how they see and perceive the brand in question.

With enrollment tied to funding for public and private schools, has the important role of strategic school marketing facilitated an open and competitive environment? One in which the focus is on the number of students enrolled, as opposed to the quality of offerings or of the college and career readiness of the graduates? This competition is addressed in Chapter II, referencing the work of private school educator, Tony Klemmer. Klemmer (2007) talks about schools forsaking mission for marketing and discusses, “marketing being introduced as a panacea for enrollment problems or as a substitute for strict adherence to mission” (p. 2). Though not measured in this study, is the product (education) that the school or district is selling really superior to what a neighboring private school, public charter, or traditional public has to offer? Or has the perception that a particular program is better (as a result of marketing) overshadowed school academic data points that might suggest otherwise?

Implications for Policy

Schools are complex organizations on a quest to legitimize themselves in an open market. As stated in the conceptual framework in Chapter II, the most fundamental thing an organization, or school in the case of this study, does is to strive to appear legitimate to the outside world. This legitimacy comes from the adoption of practices from the organizational field, made up of the aggregate organizations (schools) that constitute a recognized area of institutional life (Meyer & Rowan, 2006). Those organizations make up the larger educational institution.

Vouchers have further complicated the educational institution, creating an additional layer of financial complexity. As the 2017 PDK Gallup Poll showed in Chapter II, support for vouchers in the United States has wavered as the program continues to expand and more public dollars are invested in private education. While parents, overall, viewed cost as the primary reason their children did not attend private institutions, the study revealed that cost was not the rationale for a decrease in the support of the voucher program. The decline in the public's support of the voucher program was centered around the issue of public dollars supporting a religious education (Starr, Richardson, & Heller, 2017, p. 15). Religion in public schools presents a highly contentious partisan and ideological issue. Public dollars supporting a private, possibly parochial, education is not a neutral stance.

In a 2013 Court Case, *Meredith vs. Pence*, the constitutionality of school vouchers was called in to question, challenging the legality of allocating public dollars toward a private and/or parochial education. Findings were as follows (Cerniak, Stewart, & Ruddy, 2015):

The Indiana Supreme Court upheld the constitutionality of the program in 2013 in the *Meredith v. Pence* (2013) decision, wherein the court ruled that the ICS program is fully compliant with the constitution. The court found that the program provides a suitable means for encouraging education for Indiana's children without threatening the parallel uniform system of public schools guaranteed by the constitution (*Meredith v. Pence*, 2013). The court reasoned that the primary beneficiaries of the program are the families who receive scholarships, rather than the schools or the state. In this regard, the allocation of public funds to private schools, including religious schools, through the ICS program does not directly benefit religious institutions, and therefore does not violate the constitution (p. 8).

Despite wavering national support, the program continues to thrive in Indiana. Should this level of local support shift, there is the potential for action to be taken by the legislature around the continued expansion of the voucher program in Indiana. This would be especially relevant if the political party in control shifts. The funding of public education must be supported by the community. In turn, the community should be able to expect that public schools will be good stewards of taxpayer money, using those dollars efficiently, responsibly, and strategically.

In Indiana, the number of students utilizing vouchers continues to rise, so public schools must continue to prioritize meeting the demands of families in order to maintain enrollment. This issue is larger than just fiscal management and with the support of expanded school choice, has become a policy issue. According to the Indianapolis Star (2017):

Now, 80 charter schools enroll some 40,000 students and receive more than \$300 million in taxpayer dollars per year that previously went to traditional public schools. And nearly 35,000 students received \$150 million in vouchers, making the program larger than the state's largest school system and rivaling enrollment in charter schools.

While charters and vouchers were growing, the number of school-aged kids in Indiana wasn't. Traditional public schools were made to fight these new public options over the same number of kids — essentially, fighting to keep their doors open (Herron & Fittes).

The severity of this funding crisis, exacerbated by the Indiana property tax caps in 2009 and the elimination of legislative provisions that gradually decreased school funding to schools with declining enrollment have resulted in the bankruptcy of two Indiana school systems. Traditional

public schools and public charter schools must examine their spending relative to their enrollment and make drastic adjustments. Otherwise it is likely the prevalence of referendum and financial crises for public education organizations in the state will continue to rise. Public schools must have students, and marketing may be an effective tool to both recruit and retain the population they wish to serve.

Implications for Practice

Educating children requires both a vision and a plan. Part of that plan, based on the results of this study, is school marketing. This included proactivity advocating for, and telling the story of, the organization through the use of multiple methods and platforms.

Professionals interviewed shared repeatedly that they are consistently watching and learning from one another. As an example, when one public school professional was asked where she got her ideas, she shared:

I get most of my ideas from my colleagues in the field. I bounce ideas off them. Or things I might see or hear about them doing with the media or out in the field. I am constantly doing research on the latest and greatest. That said, most of it is talking to my colleagues about what works, what doesn't, what new, and what's evolving out there in school marketing and public relations. It's important to understand that what we do is a little different from traditional marketing" (SF, personal communication, March 15, 2017).

These professionals see value in the work they do and respect the work and efforts of their peers in the educational marketing arena. One public school district professional spoke about the validity of the work done, sharing:

I would say it's as valid a profession as any other marketing position in any other type of institution. School Marketing and Public Relations really has come a long way. It has grown legs, matured, and proven itself to be valuable to districts.

Schools really can't do without it. I know some do, and I don't know how they do it. What I do know is that someone is doing the work. Even if they aren't getting paid for it, that work is being done (BS, personal communication, March 21, 2017).

Given that school marketing professionals work in a highly specialized field and are already watching and learning from one another, there exists the potential to benefit from increased collaboration.

Public schools could collaborate more and communicate a cohesive and united front to the larger community in support of traditional public education. By sharing ideas and collectively investing in marketing activities, they could stretch their marketing budgets further and possibly engage in more marketing activities. Several study participants mentioned that they are members of the National School Public Relations Association (NSPRA). This non-profit organization serves as a resource for school marketing and communications professionals nationwide, by providing access to quality communication products, relevant research, community contacts, and thirty-two state chapters that provide local networking opportunity. The current president of the Indiana Chapter (INSPRA) participated in this study and placed a strong emphasis on the value of collaboration with colleagues in the field.

Private schools, though eligible for membership with NSPRA/INSPRA, also have local consortiums that are geared towards supporting smaller parochial programs. Two private school professionals mentioned that their schools are members of the non-profit Independent Schools

Association of the Central States (ISACS). The mission on their website (2017) reads, “ISACS leads schools to pursue exemplary independent education” (Independent Schools Association of the Central States, 2017). One private school marketing professional that mentioned ISCAS is of particular benefit to their organization with regard to admission. Further engagement with these organizations could facilitate a more cohesive and powerful message around what these private organizations have to offer students and families.

Regardless if these professionals elect to harness the power of collaboration, they have continued to work diligently to tell the story of their organizations. In telling that story, all study participants saw the digital realm as being extremely important to their efforts. The value of a comprehensive website and a consistent social media presence were perceived by all participants as the foundation of a successful communications and marketing program, beyond anything that a document could provide. Though participants downplayed the importance of print, diminishing the significance of the supporting documents provided by study participants, all have continued to engage in some type of print marketing. If any document generated was perceived by the school marketing professional as having high impact, it was immediately incorporated digitally on the district or school website.

As stated in several interviews, families do most of their school research online. The website is the first impression, or front door, of the organization. It is the first place that people go to for information. Public school marketing professionals saw the importance of this as well, with several citing significant financial investments in website redesign and visual enhancements. The investments are being made with the objective of providing a better user experience. This emphasis on digital marketing and communication continues to expand, with mobile apps becoming

increasingly prevalent for districts and schools, as well as an increase in the opportunity for educational organizations to participate in online geo-targeted marketing.

Implications for Research

When the voucher program began in Indiana during the 2011-2012 school year, based on program requirements, all participants (students) had attended a public institution previously. According to then-governor, Mitch Daniels, “Public schools will get the first shot at every child. If the public school delivers and succeeds, no one will seek to exercise this choice” (Turner, Weddle, & Balonon-Rosen, 2017). In 2013, these rules shifted under the leadership of then-governor, Mike Pence. Additional pathways to obtaining a voucher (See Chapter II) were created, increasing access to these dollars for lower income families, should the voucher accepting organization choose to accept them.

With the number of students using vouchers growing (see Table 2), it is worth considering the number of students that never attended a public school. According to Turner, Weddle, & Balonon-Rosen (2017):

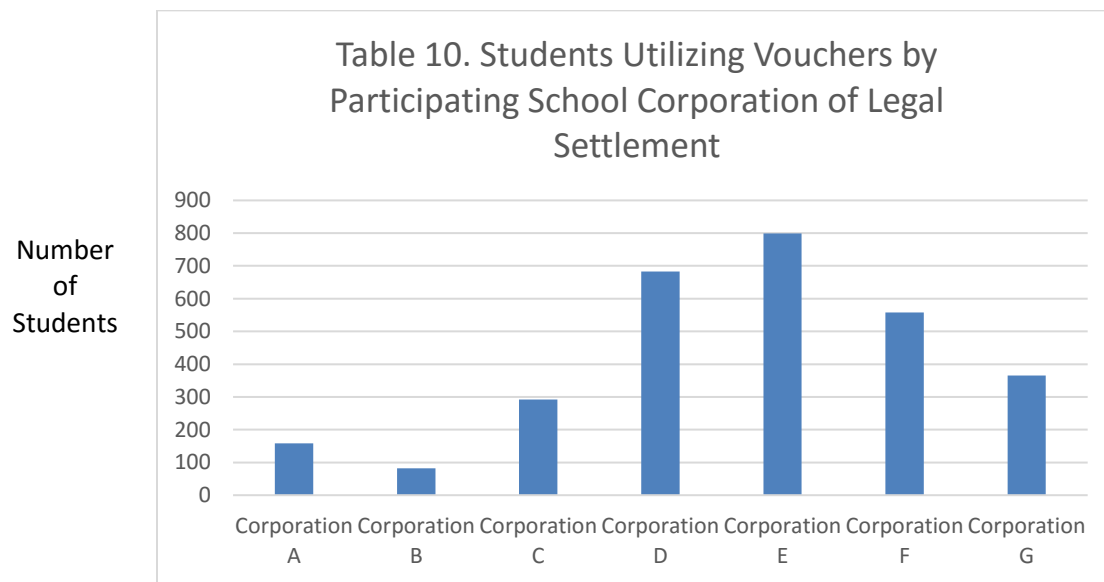
This shift in the program's rules, begun by Pence in 2013, has led to a shift in student demographics as well. White voucher students are up from 46% that first year to 60% today, and the share of black students has dropped from 24% to 12%. Recipients are also increasingly suburban and middle class. A third of students do not qualify for free or reduced-price meals. While the program was once premised on giving low-income, public school families access to better schools, this year (2017) fewer than 1% of voucher students used a pathway, written into the law, that's meant specifically for students leaving failing schools.

Research should also examine how the development of these expanded pathways in 2013 and increasingly lax rules around obtaining vouchers have impacted school marketing professionals in their recruitment efforts. One private school participant indicated that students using voucher dollars to support private school tuition represented both sides of the spectrum, with some having attended public schools previously, and others having completed their entire educational career in the private school arena. With funding tied to individual children and calculated based on their school of attendance on the ADM (Average Daily Membership) Count Day, the use of vouchers redirects funds away from public schools for students that would otherwise be part of their program. This fundamental shift in the role the voucher program plays for families seeking to exercise their school choice options may warrant review by the state as time progresses and funding formulas continue to shift.

The ADM count day was twice annually until the 2017-2018 school year, when it reverted back to being once during the fall semester. While this helps districts with enrollment that declines between the fall and spring semesters, it provides additional financial challenges to growing public school districts. If a student attends a public charter school in the fall, then transfers to their local traditional public school in the spring, the charter school keeps the money allocated by the state for that child for the entire school year. This is because the child was enrolled with the public charter on the ADM count day.

Research should also consider, given their size and geographic location, the non-participation in this study by the largest public school district in Marion County. This public school district, having opted out of participation in this study through non-response, has experienced a decline in enrollment, enrolling 28,767 students in 2016-2017, down from 30,813 during the 2013-2014 school year (Indiana Department of Education Compass). While no survey

or interview data is included in this study, of interest is that this public school district loses the largest number of students to competitors through the use of vouchers of any district in central Indiana. According to the Indiana Department of Education 2016-2017 Choice Scholarship Program Report, 3,453 students with legal settlement in this public school district utilized a school voucher to attend a private/parochial institution. In contrast, students with legal settlement in the seven traditional public school corporations participating in this study who utilize a voucher total 2,937 (Indiana Department of Education, 2017). The breakdown can be viewed below in Table 10 from data obtained in the survey.



Do these numbers speak to a need for increased positive exposure and an increase in strategic marketing initiatives to be viewed by the community as a strong competitor in the educational market place? Or perhaps the underlying issue lies with the primacy, or quality, of the product that they are producing, discussed further in Chapter II.

Though not explored in this study, the discrepancy in the marketing funding between traditional public schools in central Indiana may also warrant additional consideration. What is the current rationale from traditional public school district leadership as to the funding that each district has? Increasing or decreasing enrollment? This there a strategic plan or Board of Education directed focus on school marketing? Do those leaders view themselves as the Chief Executive Officer of large, complex corporations, existing to educate children? Or do they view themselves as leaders of learning?

A discussion item earlier in Chapter V that lends itself to future research is the idea that perception is reality in marketing. If asked, what would be a parent's rationale for sending their child or children to a particular school? Is the quality of the school marketing done truly congruent with the education that an organization provides?

If a public school district has the fastest growing enrollment in the area, but is rated a "C" district based on the current Indiana Department of Education Accountability System, what does that reveal? Why did families make the choice they did for their child/children's education? Did they choose that district because of the performance data, or because of their perception of the school and the larger school community? Were they even aware of the school's performance data?

It is likely that school marketing professionals perceive that their work is having a positive impact if their district or school continues to attract and retain students. However, is there data beyond enrollment that supports those assertions? What measurable impact is their work truly having? An entry and withdrawal survey could be developed for utilization by area schools (public and private). When a family enrolls or withdraws from a program, they could be asked why. What, if anything, impacted their decision to enroll or withdraw? Where did they first hear

about the school or district? This would provide some data on the direct impact of the initiatives and could support future investment in the initiatives that emerge through the survey results as having the most value.

Conclusion

The purpose of this study was to examine the marketing practices of public and private schools in central Indiana. Also explored was the extent to which school choice initiatives in the state have impacted school and district marketing decisions. The educational institution has grown, and therefore must recruit and retain students through both school marketing and delivering a quality product. While their financial investment varies significantly, all participants in this study were engaged in multiple initiatives to tell their story to stakeholders and to advocate for their program. That story encompasses who they are (mission), celebrating their success, where they are going as an organization (vision), and all that they have to offer both current and prospective students and families. Emphasis on the digital realm has forced the professionals that participated in this study to consider their methods of information distribution to ensure they are communicating effectively to their varying target audiences. Added to the role of the private school marketing professionals was significant responsibility around both enrollment and advancement.

While the niche market of school marketing lends itself to increased collaboration among professionals to advocate for their specific program, all participating organizations recognized that they are looking for space in the same competitive arena. Participating professionals with this catch-all role that includes communications, public relations, and marketing came from varied professional backgrounds, and all had to familiarize themselves with concepts outside of their

formal professional training. This supports the idea of collaboration among peers and perceived value of involvement in professional organizations.

The central Indiana schools that participated in this study are in the highly competitive position of recruiting, retaining, educating, and ultimately graduating students. Findings provided insight to traditional public, public charter, and private educational institutions on actions taken by their peers to promote unique programming and to celebrate excellence.

Participating public schools recognize the financial implications of failing to proactively recruit and retain students for their programs in an educational free market. Herron and Fittes (2017) summarized this well with their assertion that many public schools have been ravaged by a decade of changes to Indiana's education laws and are now in a situation where they must sink or swim. With the immediate financial ramifications of declining enrollment, public schools cannot afford to wait until they are in financial crises before taking action.

The expansion of the voucher program in Indiana impacts school private school marketing professionals in their efforts to recruit the type of student they seek for their organization. Its success affirms that with economic advantage comes choice. This choice forces traditional public and public charter schools to communicate their mission and vision to both their internal and external public in a whole new way as they seek to legitimize in an open market. The research conducted lends itself to future examination of the effectiveness of school marketing campaigns to recruit both students and teachers.

Findings of this study can provide insight to public and private educational institutions on specific actions taken by their peers to both advocate for programs as well as to market and highlight achievement. In particular, traditional public and charter public schools, newer to the marketing mix, can compare their efforts with those private school colleagues, who have been

marketing their programs for a longer period of time, to determine if adequate and effective initiatives are in place. Comparisons can be made between those programs that both benefit from and are hurt by current school choice initiatives. Additionally, this research can provide insight to district leadership with regard to the value of prioritizing financial investment in school marketing in a free market. For school marketing professionals, the research provides data on direct advocacy for the work.

Educational options in the United States are growing: traditional public schools, charter schools, private schools, magnet schools, homeschooling, and online learning. Families have more choices than ever with regard to their child's education. With Indiana as a hotbed of school choice and reform, if schools don't proactively engage in the marketing mix and tell their own story in an educational free market, it will be told for them. If schools don't take the initiative and control the narrative, they face the possibility of financial and operational perils unlike they have ever seen.

APPENDIX A**Superintendent/Principal Letter**

Greetings,

My name is Dana Altemeyer and I am a doctoral candidate in the Indiana University Bloomington Ed.D. program in Educational Leadership.

Your Marketing Director or designee is being asked to participate in a research study. The purpose of the study is to investigate the following research questions:

1. What are current marketing practices in central Indiana public and private schools?
2. What was the motivation to engage in school marketing?
3. In what ways do public and private school marketing practices differ from one another in Indiana?
4. How do school officials perceive that school choice initiatives have motivated marketing practices for their school or district?

Those who agree to participation will complete a short, online survey. The survey seeks to obtain information on your program's current marketing initiatives and your perception around the impact of school choice initiatives on your efforts. There are presently no foreseen risks or discomforts associated with this research, nor is there any obligation to participate. Additionally, confidentiality of respondents will be protected through the assignment of unique respondent link. Password protection will ensure that only individuals with password can access the survey.

Those willing will be contacted for a follow up semi-structured interview and to share documents used in program marketing. Confidentiality of those participants will also be protected and a Consent to Participate in Research form signed prior to the interview.

Your participation is greatly appreciated. I am happy to provide results at your request. Please do not hesitate to contact me directly with any questions or concerns that you have regarding this research. Please contact me within one calendar week of receipt of this correspondence if you prefer that I not contact your PR/Marketing professional. I can be reached via email at daltemey@indiana.edu or by phone at 317-748-1188.

APPENDIX B

Marketing Professional Letter & Survey

Greetings,

My name is Dana Altemeyer and I am a doctoral candidate in the Indiana University Bloomington Ed.D. program in Educational Leadership.

Your superintendent or building leader was contacted and informed that you are being asked to participate in a research study. The purpose of the study is to investigate the following research questions:

1. What are current marketing practices in central Indiana public and private schools?
2. What was the decision process or motivation to engage in school marketing?
3. In what ways do public and private school marketing practices differ from one another in Indiana?
4. How do school officials (district or private school administrators) perceive that school choice initiatives have motivated marketing practices for their school or district?

Those who agree to participation will complete a short, online survey. The survey seeks to obtain information your program's currently marketing initiatives and your perception around the impact of school choice initiatives on your program. There are presently no foreseen risks or discomforts associated with this research, nor is there any obligation to participate. Additionally, confidentiality of respondents will be protected through the assignment of unique respondent link. Password protection will ensure that only individuals with password can access the survey.

If you agree to participate, you will be contacted for a 30-minute follow up semi-structured audio taped interview and to share documents used in program marketing. Confidentiality will be protected and a Consent to Participate in Research reviewed prior to the interview.

Your participation is entirely voluntary and would be greatly appreciated. I am happy to provide the results of the study at your request. Please do not hesitate to contact me directly with any questions or concerns that you have regarding this research. I can be reached via email at daltemey@indiana.edu or by phone at 317-748-1188. Additionally, you can contact the Human Subjects Office (HSO)/Institutional Review Board (IRB) at Indiana University Bloomington if you have questions about your rights as a research participant at 317-278-3458 or irb@indiana.edu.

Web Survey Available to Marketing Professionals through IU Bloomington Qualtrics Program.

Please identify your role: *(Select one)*

- Private school Marketing Employee
 Public school Marketing Employee
 Other

If you responded above as a private school employee, do you participate in the school voucher program?

- Yes
 No
 I am not a private school employee.

Does your program identify as: *(Select one)*

- Urban
 Suburban
 Rural

Please indicate the size of the program you lead: *(Select one)*

- Students and Employees make up less than 500 people.
 Students and Employees make up between 501-1,000 people.
 Students and Employees make up between 1,001-5,000 people.
 Students and Employees make up between 5,001-10,000 people.
 Students and Employees make up 10,001-15,000 people.
 Students and Employees make up over 15,001 people.

Please indicate the percentage of your student population that qualify for free or reduced price meals: *(Select one)*

- 0-25%
 26-50%
 51-75%
 76-100%
 Not Applicable

Please indicate the amount of institutional funding allocated during the past year to school/program marketing: *(Select one)*

- < \$5K
 \$5-\$10K
 \$11-\$25K
 \$26-\$50K
 \$51-\$75K
 \$76-\$100K
 \$101K –

Please indicate the grades that your program serves: *(Select all that apply)*

- Elementary Grades (1-5)
 Middle Grades (6-8)

____ Upper Grades (9-12)

Using the following 1-5 scale, please indicate, by writing the number that correlates, the degree to which you agree with the statements listed below:

- 1 - Strongly Disagree
- 2 - Disagree
- 3 - Neutral
- 4 - Agree
- 5. Strongly agree

- ____ I try to keep current on my colleagues/competition marketing efforts.
- ____ I am active on social media on behalf of my program.
- ____ I believe that building principals have a responsibility to market their school.
- ____ I believe marketing public schools is a waste of resources.
- ____ I believe that perception is reality when it comes to my program.
- ____ I believe that the public is generally unaware of what goes on in schools.
- ____ I believe that Public Relations and School Marketing are synonymous.
- ____ I believe that K-12 education can learn about effective marketing from peers in higher education.
- ____ I don't think that educators should be in the business of marketing.
- ____ I believe that education is a business and should be marketed as such.
- ____ I believe that geographic location impacts my decision to market my program.
- ____ My colleagues marketing efforts impact marketing decisions for my program.
- ____ I believe that a lack of clearly defined market competition serves as incentive for schools to continue to collaborate, communicate, and differentiate among themselves.
- ____ I believe school marketing has less impact on perception of schools than does social class.
- ____ I believe that school choice initiatives have encouraged my program to market in new and innovative ways.
- ____ I have expanded my program's marketing efforts as a direct result of Indiana school choice initiatives.
- ____ My program's general fund has been negatively impacted as a direct result of Indiana school choice initiatives.
- ____ I don't believe it is appropriate to allocate school funds towards school marketing.
- ____ School choice initiatives in Indiana have no bearing on my program or our marketing efforts.
- ____ Marketing is an integral part of sharing our mission and vision with the community.
- ____ My program's enrollment is dependent on strategic school marketing.
- ____ I am directly involved with marketing for my program.

Please check all that apply:

In my experience, when students withdraw from my program, it is to attend a: *(Please select one)*

____ Traditional Public School

- Charter School
 Private/Parochial School
 Other

My program engages in the following marketing strategies at least once per calendar year:
(Please select all that apply)

- Marketing Calendar
 Television Advertisement
 Movie Theater Advertisement
 Social media Advertising
 Pay-Per-Click
 Web marketing
 Direct Mail
 Blog
 Facebook
 Twitter
 Instagram
 You Tube channel
 Snapchat
 Print marketing (brochures, annual reports, mailers)
 QR codes
 Program sponsorship (Parent series, realtor engagement, COC, neighborhood association)
 Mobile App
 Radio Advertising
 Billboards
 Purchase of Promotional items (branded post-its, pens, mugs, etc.)
 Website Enhancement
 Other (please list): _____

My organization employs individual(s) responsible for: *(Please select all that apply)*

- Communications/Editorial Content
 Public Relations
 Graphic Art
 Digital Marketing
 None of the Above

Short Answers Questions: *Please respond briefly to the following questions:*

What population, if applicable, is your organization targeting with marketing efforts? Please list all that apply.

Would you be willing to participate in a brief, semi-structured interview about school/district marketing?

Yes

No

If you selected yes, please provide a valid email address: _____

Are there program marketing materials that you would be willing to share during a brief, semi-structured interview?

Yes

No

Thank you for your participation and candid responses.

APPENDIX C**Semi Structured Interview Protocols and Questions**

- I. Introductions and motives of research
- II. Research Questions
- III. Protection of respondents using pseudonyms/initials
- IV. Interview Questions

Interview Questions:

1. Please share your job title and the responsibilities of your role in your organization.
2. Could you please share some information about your professional/educational background?
3. Who do you engage with in making marketing decisions for your program?
4. Where do you get your marketing ideas?
5. Do you participate in any professional organizations to gain insight on current trends?
6. Please share your thoughts on the impact of school choice, specifically the voucher program, on your program and marketing efforts.
7. Where do you spent the majority of your time when marketing your program?
8. What is the decision process you go through when determine the type of marketing practices in which to engage?

APPENDIX D

Survey Data

Q1 - Please identify your role: (Select one)			
#	Answer	%	Count
1	Private School marketing employee	33.33%	4
2	Public School marketing employee	66.67%	8
3	Other	0.00%	0
	Total	100%	12

Q2 - If you responded above as a private school employee, do you participate in the school voucher program?						
#	Answer	%	Count			
1	Yes	27.27%	3			
2	No	9.09%	1			
3	I am not a private school employee.	63.64%	7			
	Total	100%	11			

Q3 - Does your program identify as: (Select one)			
#	Answer	%	Count
1	Urban	66.67%	8
2	Suburban	33.33%	4
3	Rural	0.00%	0
	Total	100%	12

Q4 - Please indicate the size of the program you lead: (Select one)			
#	Answer	%	Count
1	Students and Employees make up less than 500 people.	16.67%	2
2	Students and Employees make up between 501-1,000 people.	0.00%	0
3	Students and Employees make up between 1,001-5,000 people.	25.00%	3
4	Students and Employees make up between 5,001-10,000 people.	0.00%	0
5	Students and Employees make up between 10,001-15,000 people.	16.67%	2
6	Students and Employees make up over 15,001 people.	41.67%	5
	Total	100%	12

Q5 - Please indicate the percentage of your student population that qualify for free or reduced price meals:			
#	Answer	%	Count
1	0-25%	33.33%	4
2	26-50%	25.00%	3
3	51-75%	33.33%	4
4	76-100%	8.33%	1
5	Not Applicable	0.00%	0
	Total	100%	12

Q6 - Please indicate the amount of institutional funding allocated during the past year to school/program marketing:			
#	Answer	%	Count
1	Less than \$5,000	25.00%	3
2	\$5,000-\$10,000	0.00%	0
3	\$11,000-\$25,000	8.33%	1
4	\$26,000-\$50,000	16.67%	2
5	\$51,000-\$75,000	16.67%	2
6	\$76,000-\$100,000	16.67%	2
7	More than \$101,000	16.67%	2
	Total	100%	12

Q7 - Please indicate the grades that your program serves: (Select all that apply)			
#	Answer	%	Count
1	Elementary Grades (1-5)	83.33%	10
2	Middle Grades (6-8)	83.33%	10
3	Upper Grades (9-12)	91.67%	11
	Total	100%	12

Q12 - My program engages in the following marketing strategies at least once per calendar year:			
#	Answer	%	Count
1	Marketing Calendar	58.33%	7
2	Television Advertising	25.00%	3
3	Movie Theater Advertising	8.33%	1
4	Social Media Advertising (Promoted Ads)	50.00%	6
5	Pay-Per-Click Ads	33.33%	4
6	Web Marketing	58.33%	7
7	Direct Mail	66.67%	8
8	Blogging	33.33%	4
9	Facebook	91.67%	11
10	Twitter	91.67%	11
11	Instagram	50.00%	6
12	You Tube channel	50.00%	6
13	Snapchat	8.33%	1
14	Print Marketing (brochures, annual reports, etc.)	91.67%	11
15	QR codes	33.33%	4
16	Program Sponsorship (Chamber of Commerce, neighborhood associations, etc.)	50.00%	6
17	Mobile App	41.67%	5
18	Radio Advertising	33.33%	4
19	Billboards	16.67%	2
20	Purchase of Promotional Items (branded collateral materials)	66.67%	8
21	Website Enhancements	66.67%	8
22	Other	33.33%	4
	Total	100%	12

Q13 - My organization employs individual(s) responsible for:			
#	Answer	%	Count
1	Communications/Editorial Content	81.82%	9
2	Public Relations	90.91%	10
3	Graphic Art	36.36%	4
4	Digital Marketing	45.45%	5
	Total	100%	11

Q14 - What population, if applicable, is your organization targeting with marketing efforts?			
Parents in certain zip codes with underperforming public school choices			
100,000			
Citizens within our district boundaries			
Parents, Prospective Parents & Community Members			
Adults/Families			
Greater Indianapolis and surrounding suburbs			
parents and community			
Private School Attendees			

Q15 - Would you be willing to participate in a brief, semi-structured interview about school/district marketing?			
#	Answer	%	Count
1	Yes	91.67%	11
2	No	8.33%	1
	Total	100%	12

Q15 - Using the following 1-5 scale, please indicate, by selecting the number that correlates, the degree to which you agree with the statements listed below:

#	Question	1 - Strongly Disagree	2 - Disagree	3 - Neutral	4 - Agree	5 - Strongly Agree	Total
1	I try to keep current on my colleagues/competition marketing efforts.	0.00%	0	0.00%	0	25.00%	3
2	I am active on social media on behalf of my program.	0.00%	0	0.00%	0	25.00%	3
3	I believe that building principals have a responsibility to market their school.	0.00%	0	8.33%	1	0.00%	0
4	I believe marketing public schools is a waste of resources.	66.67%	8	33.33%	4	0.00%	0
5	I believe that perception is reality when it comes to my program.	0.00%	0	0.00%	0	83.33%	10
6	I believe that the public is generally unaware of what goes on in schools.	0.00%	0	33.33%	4	25.00%	3
7	I believe that Public Relations and School Marketing are synonymous.	16.67%	2	33.33%	4	8.33%	1
8	I believe that K-12 education can learn about effective marketing from peers in higher education.	0.00%	0	0.00%	0	33.33%	4
9	I don't think educators should be in the business of marketing.	58.33%	7	25.00%	3	0.00%	0
10	I believe that education is a business and should be marketed as such.	0.00%	0	16.67%	2	8.33%	1
11	I believe that geographic location impacts my decision to market my program.	0.00%	0	8.33%	1	25.00%	3
12	My colleagues marketing efforts impact marketing decisions for my program.	0.00%	0	8.33%	1	25.00%	3
13	I believe that a lack of clearly defined market competition serves as incentive for schools to continue to collaborate, communicate, and differentiate among themselves.	0.00%	0	16.67%	2	25.00%	3
14	I believe school marketing has less impact on perception of schools than does social class.	0.00%	0	66.67%	8	25.00%	3
15	I believe that school choice initiatives have encouraged my program to market in new and innovative ways.	8.33%	1	25.00%	3	8.33%	1
16	I have expanded my program's marketing efforts as a direct result of Indiana school choice initiatives.	16.67%	2	33.33%	4	0.00%	0
17	My program's general fund has been negatively impacted as a direct result of Indiana school choice initiatives.	8.33%	1	41.67%	5	33.33%	4
18	I don't believe it is appropriate to allocate school funds towards school marketing.	41.67%	5	58.33%	7	0.00%	0
19	School choice initiatives in Indiana have no bearing on my program or our marketing efforts.	41.67%	5	41.67%	5	8.33%	1
20	Marketing is an integral part of sharing our mission and vision with the community.	0.00%	0	0.00%	0	8.33%	1
21	My program's enrollment is dependent on strategic school marketing.	0.00%	0	25.00%	3	8.33%	1
22	I am directly involved with marketing for my program.	0.00%	0	0.00%	0	8.33%	1

Q16 - In my experience, when students withdraw from my program, it is to attend a: (Please select one)			
#	Answer	%	Count
1	Traditional Public School	33.33%	4
2	Charter School	0.00%	0
3	Private/Parochial School	50.00%	6
4	Other	16.67%	2
	Total	100%	12

Q17 - Are there marketing program materials (artifacts) that you would be willing to share during the interview?			
#	Answer	%	Count
1	Yes	81.82%	9
2	No	18.18%	2
	Total	100%	11

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Doctor of Education, 2017 GPA 3.83/4.0

Indiana University – Bloomington, Indiana

iLEAD Educational Leadership program, 2011 GPA 4.00/4.0

University of Indianapolis – Indianapolis, Indiana

Masters of Science in School Counseling, 2007 GPA 3.99/4.0

Bachelor of Science in Elementary Education, 2004 GPA 3.78/4.0

Butler University- Indianapolis, Indiana

PROFESSIONAL LICENSURE:

State of Indiana Professional Educator's License

License No. 10022828

Instructional: General Elementary - Grades 1-6, 7/8 Non-Dept.

French - Grades 1-9

School Services: School Counselor – All Schools

Administration: Building Level Administrator – All Schools

PROFESSIONAL EXPERIENCE:

MSD of Lawrence Township – Coordinator of Communications, PR & Marketing April 2014-

- *Provide leadership, planning and implementation of the corporation's public relations strategies, policies and procedures within the schools and the community especially as they pertain to district marketing.*
- *Create, produce and coordinate internal and external district publications, fact sheets, news releases, brochures, displays/exhibits and web site information, especially for the marketing of the district magnet programs. This includes the development, coordination, and implementation of content for current and emerging social media products.*
- *Develop programming and relationships with media representatives that create opportunities for positive coverage of district events/programs.*

Indianapolis Public Schools (IPS) – District Intersession Director August 2013- October 2014
Indianapolis Public Schools (IPS) – Assistant Principal

H.L. Harshman Magnet Middle School July 2012-March 2014

Evaluate Certified Staff members

Scheduling Assistant Principal

Building Test Coordinator

Supervisor of Student Services

1003g School Improvement Grant Co-Writer

Indianapolis Public Schools (IPS) - School Counselor

H.L. Harshman Magnet Middle School

Lead Counselor May 2010-Present

1003g School Improvement Grant – Community Outreach Coordinator

Broad Ripple Magnet High School for Arts & Humanities Jul 2009-May 2010

Shortridge Middle School Aug 2008 – May 2009

Community Health Network/Gallahue Behavioral Care – Indianapolis, Indiana

School Based Therapist (IPS: McFarland Middle School) Nov 2007 – Aug 2008

Lawrence Township Schools

Lawrence Central High School – Indianapolis, Indiana

Guidance Counselor filling maternity leave position Aug 2007 - Nov 2007

Washington Township Schools

North Central High School – Indianapolis, Indiana

Guidance Intern/Counselor filling maternity leave Aug 2006 - Mar 2007

Franklin Township Community School Corporation

Franklin Township Middle School – Indianapolis, Indiana

Seventh and Eighth Grade French Teacher Aug 2004 – Jun 2006

PROFESSIONAL ACCOMPLISHMENTS/COMMUNITY INVOLVEMENT:

Benjamin Harrison YMCA Advisory Board – 2017 - Present

National Board Certified Counselor (NBCC) – 2007 - Present

1003g SIG Community Outreach Coordinator – 2011 - Present

D.R.E.A.M. Alive Mentoring Program Site Coordinator – 2010-2014

Member of Indiana Department of Education Technical Assistance Team – Fall 2011

Building Level School Test Coordinator – 2008 – 2010

Piloted Year 1 World Language at the middle school level in Franklin Township 2004 - 2006

Founder of City County Council recognized Animal C.A.R.E. Program – 2010 - Present

1003g School Improvement Grant Co-Writer – 2011

Magnet Schools of America Presenter - 2011

Butler University College of Education External Committee Member – 2009 - 2012

Indianapolis Public Schools Education Foundation Advisory Board Member – 2012 - 2014

Butler University Young Alumni Board of Directors – 2011 - 2014

Friends of Indianapolis Animal Care & Control Foundation Inc. Board Member 2013 - 2014

Marian University C.A.U.S.E. Council Member – 2013 - 2014