

Marketing as a catalyst in higher education

The survey of decision makers in higher education

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CONTENTS

CONTENTS.....	2
1	4
INTRODUCTION.....	4
Stamp Consulting.....	4
Foreword.....	5
Methodology.....	6
Responses.....	6
Reporting format.....	6
2	7
RESPONDENTS.....	7
3	9
STRUCTURES, REPORTING LINES AND RESOURCE.....	9
Context.....	9
Individual responsible for marketing reports to...Marketing representation on the SMT.....	10
Marketing representation on the SMT.....	11
Key issues.....	11
4	12
MARKETING INFLUENCE.....	12
Context.....	12
Marketing budget.....	12
Setting and managing the marketing budget.....	13
Key issues.....	13
5	14
MARKETING AND LONG TERM STRATEGIC OBJECTIVES.....	14
Context.....	14
Institution involvement in activities.....	14
Key comments.....	15
Institutions with a centralised marketing department are typically formed by, and represent, functions such as.....	15
Major areas where the centralised marketing department is called upon for advice.....	16
Key comments.....	16
Key issues.....	16
6	17
MARKETING DECISION MAKING.....	17
Context.....	17
Incidence and influence of formal strategic marketing plans.....	17
Key comments.....	18
Central marketing department involvement with corporate marketing structure.....	18
Alternative if no strategic marketing plan.....	19
Marketing involvement in 'strategic direction' decisions.....	19
Key comments.....	20
Key issues.....	20
7	21
MARKETING CULTURE.....	21
Context.....	21
Is marketing perceived as being integral to achieving corporate objectives by.....	21
Marketing influence on institutional culture.....	22
Marketing's relationship with stakeholders.....	22
Key comments.....	23
Key issues.....	23
8	24

CRITICAL SUCCESS FACTORS	24
Context	24
How marketing performance is assessed	24
Making marketing a success	25
Key comments	25
Marketing's barriers to success	26
Key issues	26
9	27
IN SUMMARY	27
Emerging issues	27
10	29
VERBATIM QUOTES FOR THE 2006 SURVEY	29

Part

1

INTRODUCTION

Stamp Consulting

Stamp Consulting supports debate and discussion in the education sector through its conferences, seminars and networking events. The company publishes investigative reports on key sector issues plus specialist journals, such as the online *News Journal*, for senior managers within the sector and regular *Briefing Papers* which comment on emerging challenges affecting the sector. It also facilitates the influential, invitation-only education sector *International Networking Group*.

Stamp Consulting, led by Rosemary Stamp, supports a wide range of organisations providing strategic management, business and marketing direction through specialist consultancy. The company's current portfolio includes:

- Corporate marketing strategy development and implementation for UK and global markets.
- Competitive brand development strategies, reputation, vision and values management.
- Positioning for higher education organisations, including effective league table positioning strategies.
- Consumer insight and corporate CRM strategy.
- New product development and portfolio management.
- Business strategy and strategic planning.
- Trend analysis and foresight planning.
- Policy response planning.
- Highly sensitive "critical response" consultancy interventions for organisations facing crisis.
- Executive coaching and mentoring for leaders, including personal effectiveness, transition strategies, culture change, approaches to consultative management and leadership development.

During the last three years, Rosemary Stamp has provided strategic support to a number of university colleges in the UK striving to achieve a change in sector status and positioning. The company also operates the *Interactive Seminar Programme*, a portfolio of 30 tailored skills development programmes.

Foreword

This report was first published by Rosemary Stamp, as part of a project conducted by the Strategic Consulting Group, Euro RSCG Riley, during 2006. It was re-issued in January 2007 by Stamp Consulting Ltd, with additional information and an updated commentary, following the establishment of the new company.

Rosemary Stamp is indebted to Euro RSCG Riley for its support in the development and management of the original survey process and to her higher education contacts who helped to refine the question schedule in advance of the survey launch and to all those within UK higher education who took part in the survey. Rosemary is also extremely grateful to CASE Europe for its support in the development of the 2006 survey: top-line findings of the survey were presented at the CASE Conference, Nottingham, in September 2006.

The 2006 research survey was designed to provide benchmark information about the state of development of the marketing function in organisations providing higher education in the UK. The survey process was managed by Alexandra Dobbins of the Strategic Consulting Group, Euro RSCG Riley. The results are presented in this document, with additional information and an updated commentary, by Rosemary Stamp, Director of Stamp Consulting Ltd.

Market place and sector changes have driven major shifts in organisational attitude to the marketing function within our educational institutions. The last two years have witnessed an increased focus on (and interest in) marketing. This has taken a variety of forms, from investment and restructure to the recruitment of staff with broader public sector or commercial experience.

Factors such as increased competition, tuition fees, and the rise of the power of student experience as a differentiator have made it inevitable that marketing will be in the ascendant in the education sector.

A number of key questions emerge:

- Just how well planned are the changes being made?
- Does (or can) marketing really act as a catalyst to drive integrated corporate strategic planning in UK higher education?
- How much control do organisations have over the direction and application of marketing resource and effort and are they able to measure return on investment?
- What enables marketing to be successful in an education organisation in 2006 and what are the barriers to progress and success?

The answers are extremely variable.

While some organisations have made great progress towards involving marketing in the delivery and management of a strategic direction for their institution, in others, the success and scope of marketing functions are hindered by a wide range of barriers from limited resources and internal politics to devolved marketing activity and inefficient reporting lines. The 2006 Survey explores the views of a wide section of managers operating at the frontline in managing current changes and market shifts and endeavouring to develop and implement strategies to secure a successful place for their institutions in their markets, both nationally and internationally.

Rosemary Stamp MA MSc MInstD MCIPR FCIM
Director: Stamp Consulting Ltd
January 2007

Methodology

The survey was hosted on a secure site from 3 July 2006 to 4 August 2006.

A link to the web site was sent to the Strategic Consulting Group's opted-in list of contacts. 172 respondents completed the survey in full.

The survey contained a maximum of 34 questions and took approximately 10 minutes to complete. Open ended questions were also included enabling respondents to add comments or raise additional issues.

The survey was confidential and managed in a way that made it impossible to identify responses from individuals or specific institutions. This is reflected in the data provided in the survey report which does not make reference to specific institutions. Similarly, the survey commentator was not privy to answers or responses from identified institutions to ensure that an objective review of the data could be provided in the survey commentary.

Responses

The profile of respondents is well balanced across the main types of institutions with 50% of respondents working in pre 1992 universities, 32% working in post 1992 universities, and almost a fifth, or 18%, working in other types of HEI's including Art Colleges and Law Schools.

Of the respondents, 77% reported that the marketing functions and operations within their organisation were centralised, while 23% were working in an organisation in which marketing was devolved.

Additional detail about respondent profiles is included in *Part 2* of this document: *Respondents*.

Reporting format

This outline report groups key themes emerging from the Survey, as follows:

- Respondents
- Structures, reporting lines and resource
- Marketing influence
- Marketing culture
- Marketing and long term strategic objectives
- Marketing decision making
- Critical success factors
- Summary

Verbatim quotes from qualitative data are reported in *blue italic* text.

Part

2

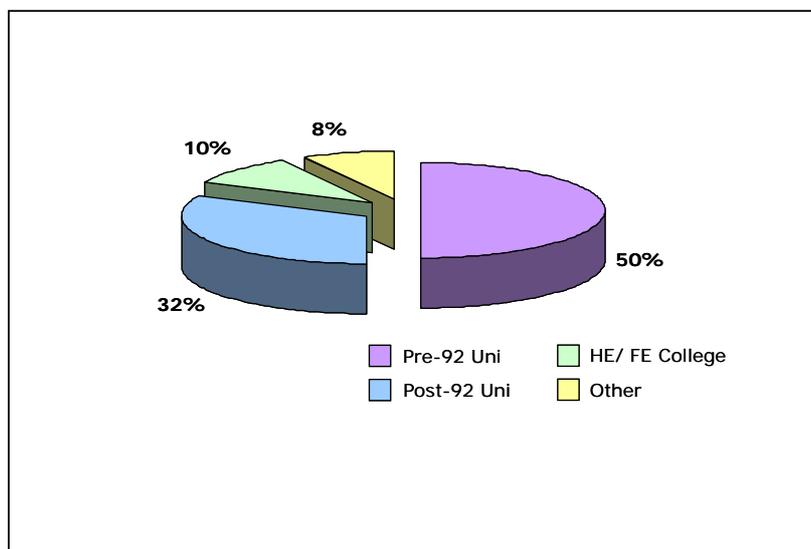
RESPONDENTS

The profile of respondents is well balanced across the main types of institutions with 50% of respondents working in pre 1992 universities, 32% working in post 1992 universities, and almost a fifth, or 18%, working in other types of HEI's including Art Colleges and Law Schools.

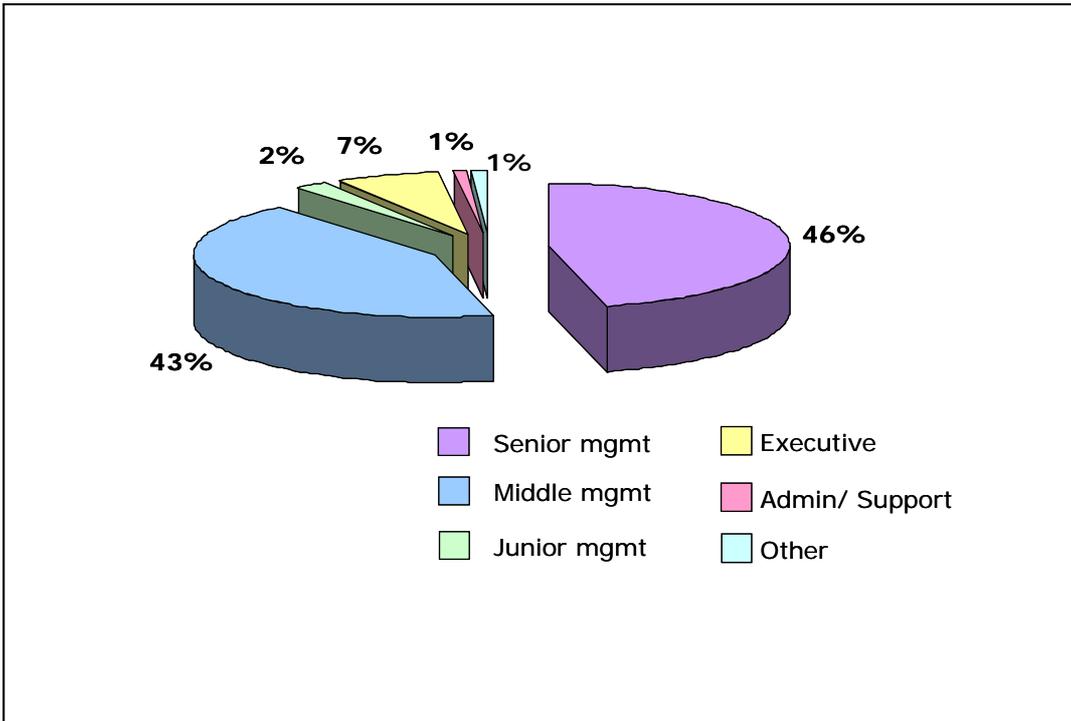
The survey introduction highlighted that the questionnaire was intended for managers and the management level of respondents reflects this emphasis with the majority, 46%, being senior managers and 43%, being middle managers. Other occupation levels or descriptions including executive or junior management account for just over a tenth, or 11%, of the sample.

Few demographic questions were asked of respondents, to keep the survey focused on management and marketing issues, but one further question defined respondents as those who are currently teaching: 14% of respondents were currently teaching and the vast majority, 86%, working exclusively in a management capacity with no teaching responsibility.

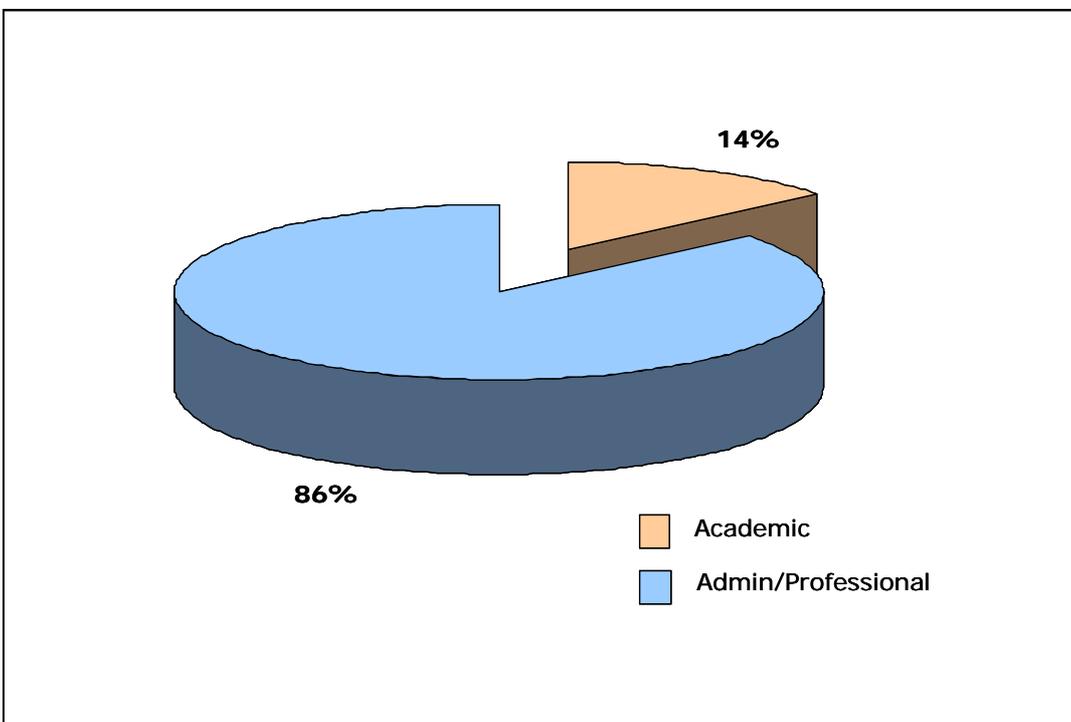
Institution Type



Respondent Level



Respondent background



Part

3

STRUCTURES, REPORTING LINES AND RESOURCE

Context

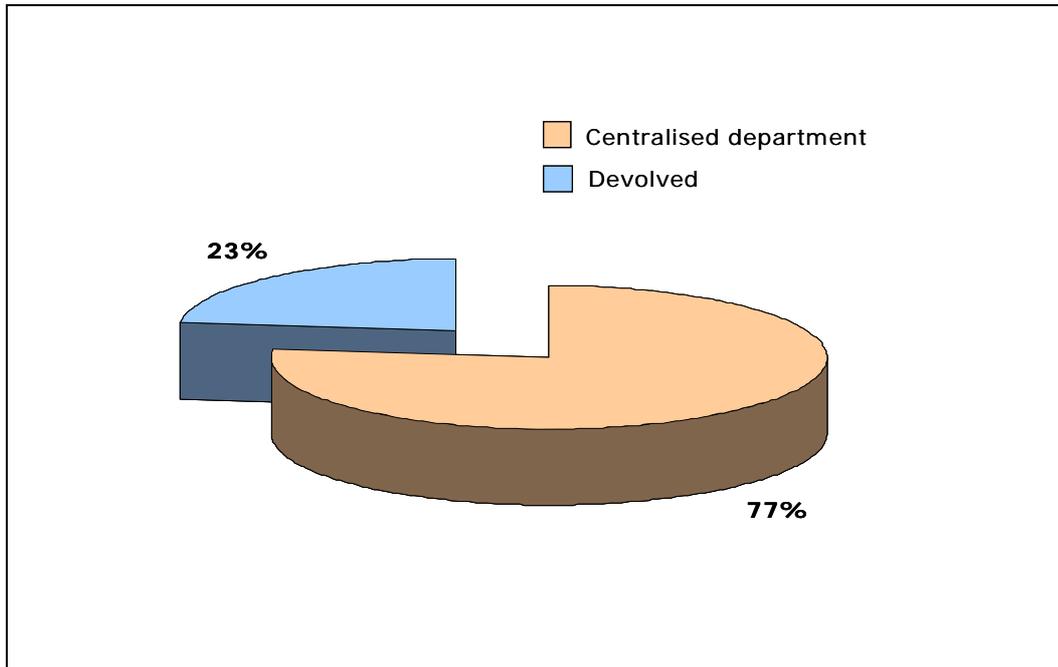
The responses recorded by the survey process questioned the components of higher education corporate strategy. Ideally, marketing should be an integral part of an organisation's corporate strategy, but, from the survey results, it is evident that this is not always the case. Marketing is often called upon to act alone, or respond to strategic direction, rather than playing an integral part in how that organisational direction is determined.

A key issue to assess is what level of access or influence the marketing function has re: an organisation's senior management team (SMT). For many newly developed marketing directorships, access or reporting lines to the SMT are make or break, as these channels determine whether an individual will actually have the influence and decision-making powers to drive through real change and strategic innovation.

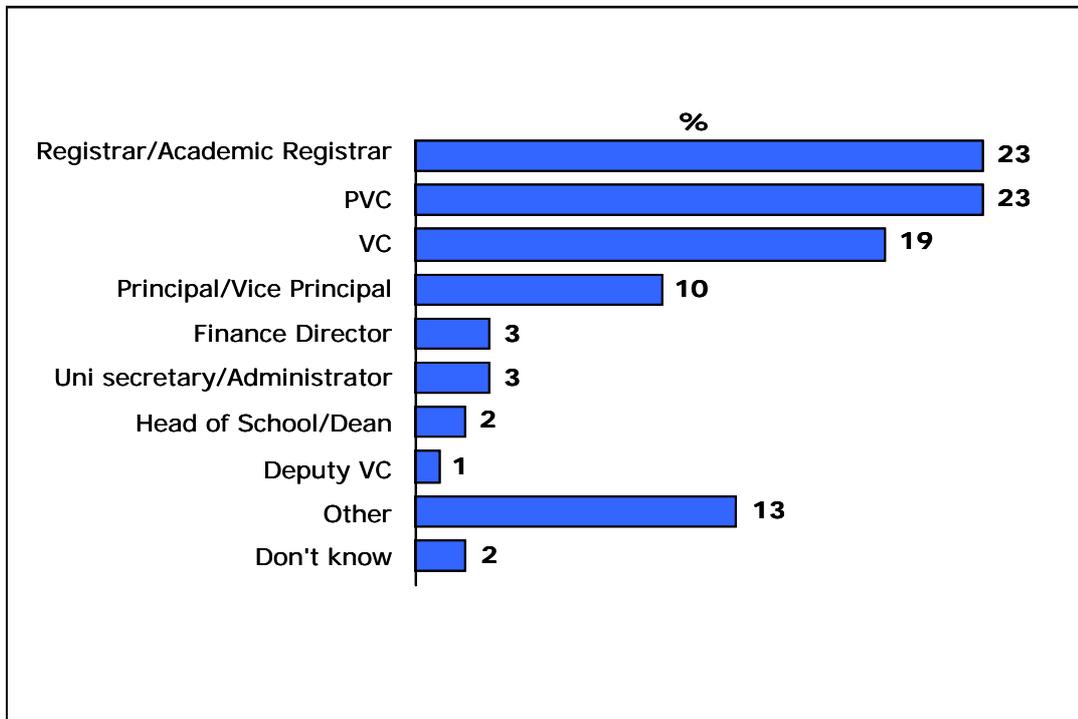
Inevitably, if marketing is not represented effectively within the decision-making arena of an organisation, it can have little power to drive corporate strategy proactively, but, rather, is destined to manage a response to a strategic direction that is decided in a sphere beyond its reach. One of the greatest difficulties facing organisations attempting to restructure marketing operations along more strategic lines is the problem in shaking off traditional reporting lines and a "task-driven" or "element by element" approach to marketing operations.

To be effective, marketing needs to be integral to corporate strategy and, as a function, be able to drive and influence the direction of long term corporate planning processes, rather than simply being forced to respond to decisions and plans made beyond its reach.

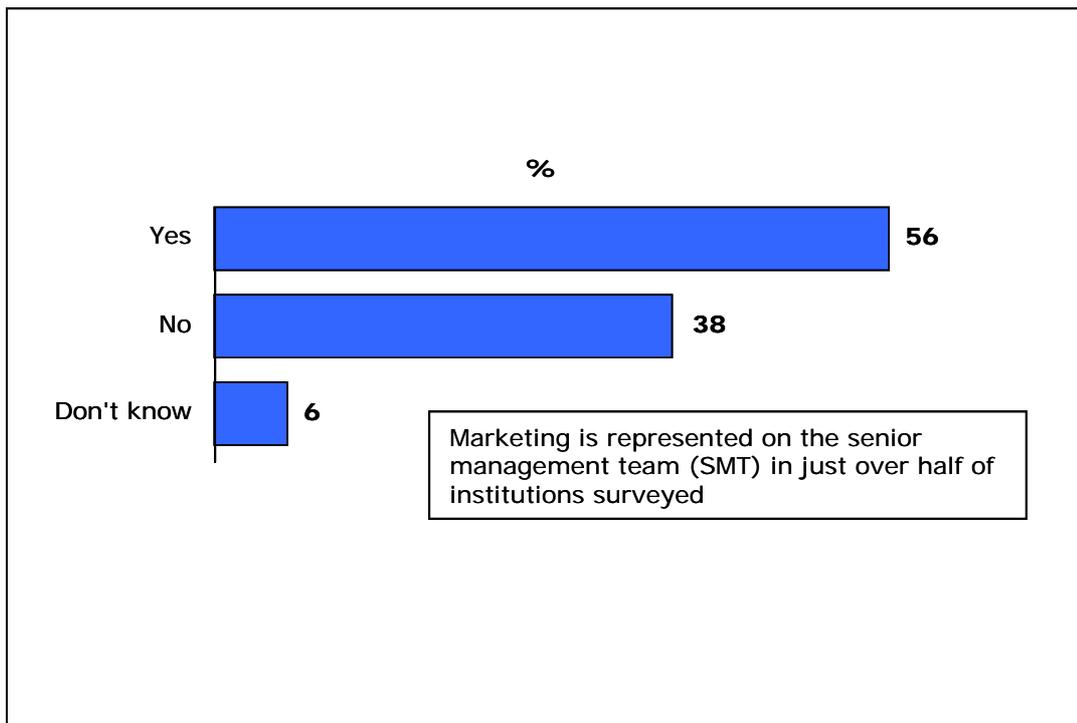
Management of marketing



Individual responsible for marketing reports to...



Marketing representation on the SMT



Key issues

- Of the respondents, less than 1 in 5 Marketing Directors/Managers report directly to the VC or the Principal Officer.
- Marketing is reported as being represented on the senior management team (SMT) in only 56% of responses.
- Only 43% of responses indicate that their marketing departments are completely, or mostly, involved in corporate strategic planning.

Part

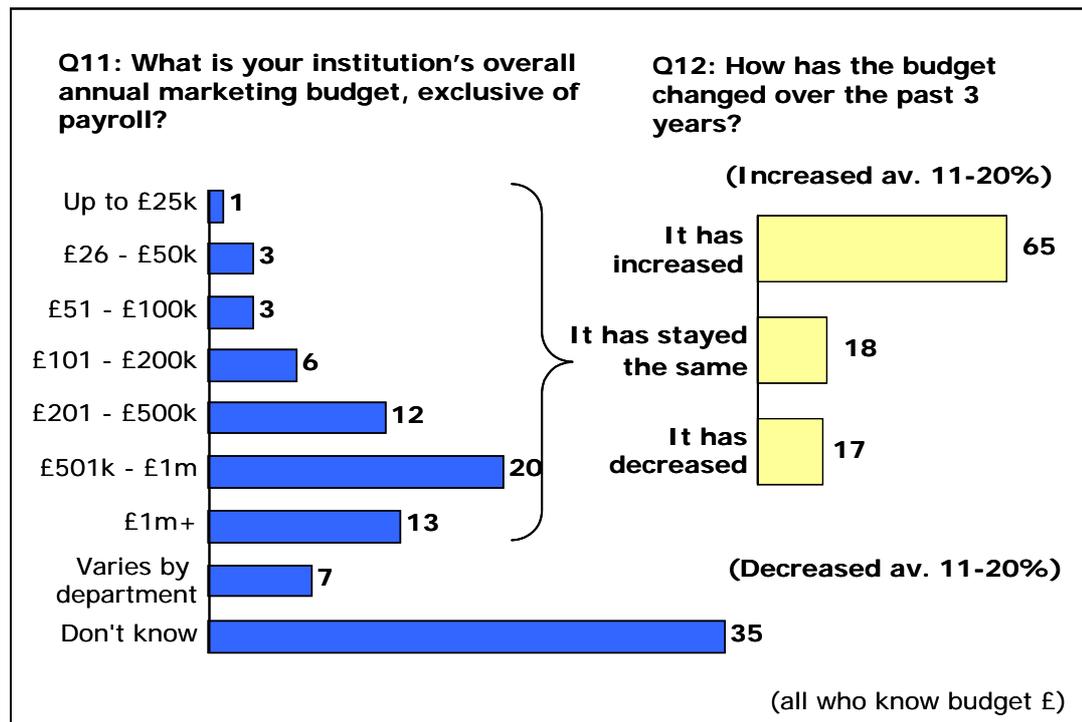
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MARKETING INFLUENCE

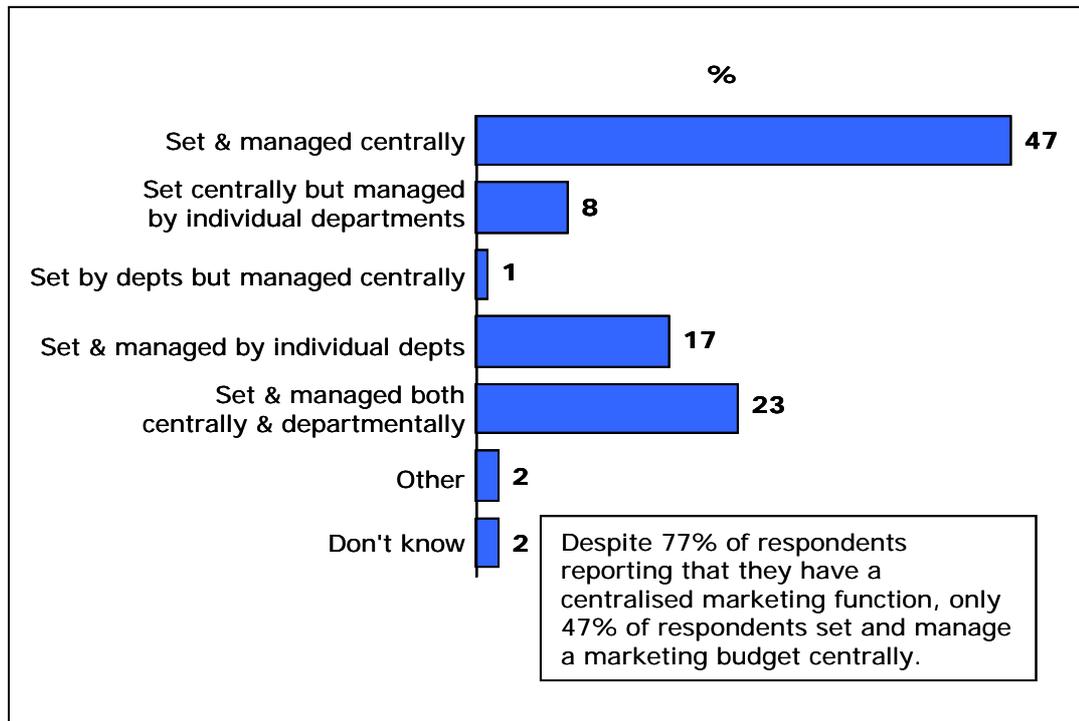
Context

Marketing budgets will always be a contentious issue, will always attract media attention and will always cause debate about the relative size and deployment of resources. The real issues to address, however, are whether an organisation possesses an accurate picture of its marketing spend and whether that spend delivers any measurable return on investment.

Marketing budget



Setting and managing the marketing budget



Key issues

- Marketing spend monitoring is extremely variable, a situation which reflects the devolvement of marketing activity in many organisations.
- 65% of respondents' budgets have risen by approx 10-20% in the last 3 years.
- 17% of respondents' budgets have fallen by the same amount in last 3 years.
- Gaps between marketing control and budgetary resource development are critical issues for many organisations and suggest the need for greater levels of measurement of efficiency and relative return on investment.
- Only 47% of respondents' budgets are set and managed centrally.
- There is a significant instance of schools or faculties operating with autonomy from the centre, but how much synergy exists between these separate marketing activities?
- It is important to note that a proportion of such devolved activity will have developed due to a historic lack of support from the centre in "pre-marketing" times plus a real need for specialist marketing approaches to specialist portfolio areas.
- Of the 77% of respondents with a centralised marketing function, 70% either always, or mostly, are involved with the activities of individual departments, yet only 47% set and manage a marketing budget centrally.

Part

5

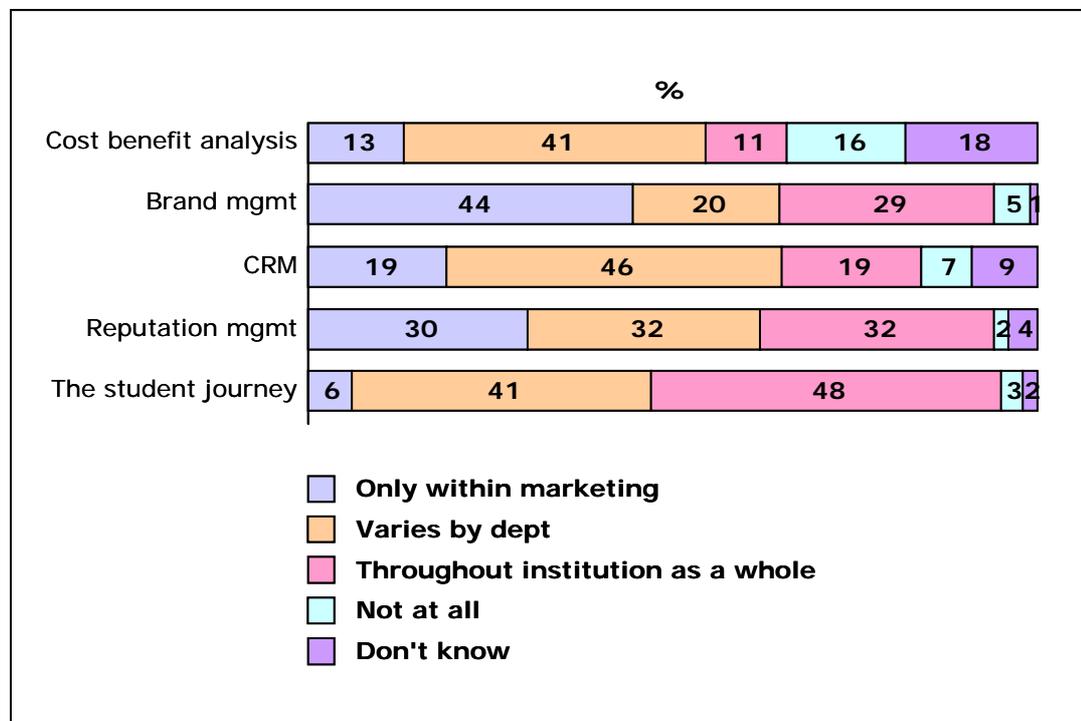
MARKETING AND LONG TERM STRATEGIC OBJECTIVES

Context

The reach and scope of activities related to marketing varies greatly within higher education organisations. Within some, the cost benefit analysis of activities is engaged in by only some parts of the organisation, while in others, management of the student journey is increasingly a concern across many areas.

The real challenges derive from instances where marketing effort is managed separately by differing parts of an organisation. This may lead to the communication of mixed messages to similar stakeholder groups and the duplication of marketing effort.

Institution involvement in activities



Key comments

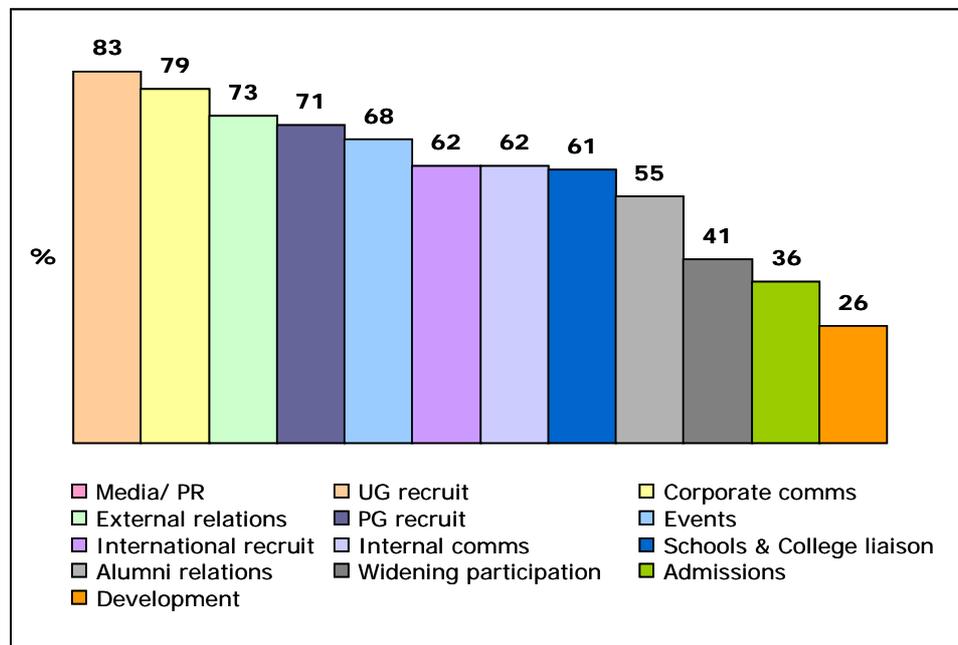
"We have a highly devolved structure where faculties and schools are responsible for setting their own marketing goals.

There is a central marketing function which provides advice and guidance to those divisions and looks after institution wide marketing and policy etc.

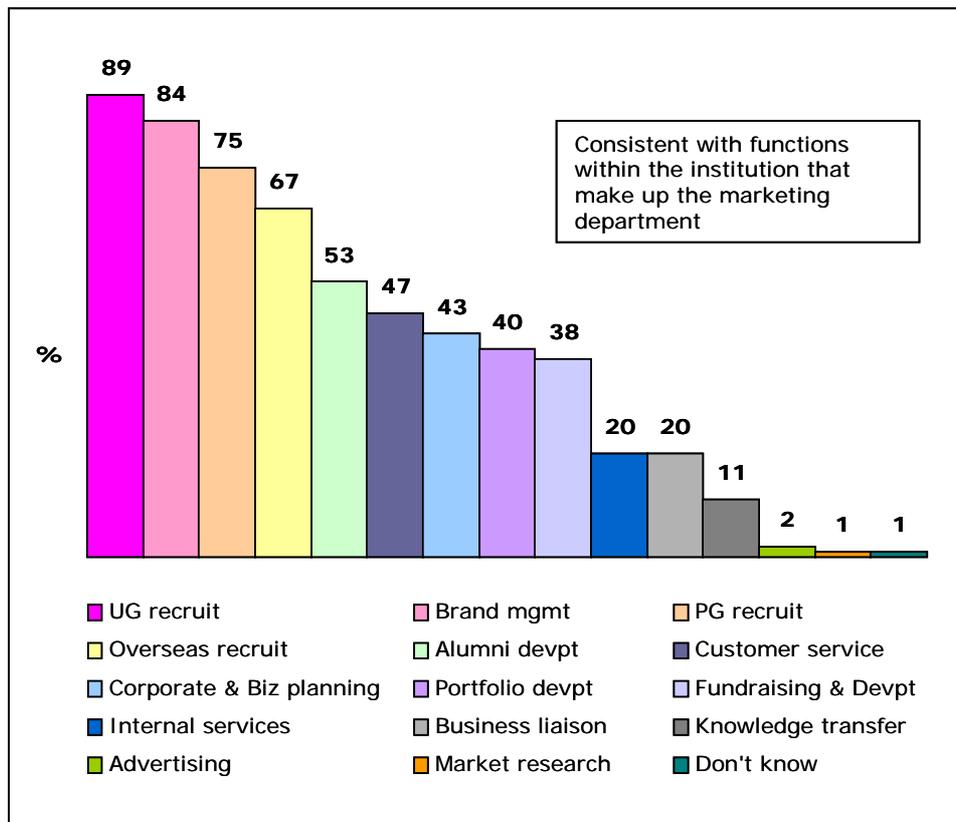
The challenge is getting a consistent message across a very large institution."

"International Marketing is conducted by the International Office, not our Marketing Department."

Institutions with a centralised marketing department are typically formed by, and represent, functions such as...



Major areas where the centralised marketing department is called upon for advice



Key comments

"Marketing and Admissions are not very closely linked leading to different objectives clashing. The combination of a central Marketing function, but budget and responsibility within departments makes it difficult to monitor and produce a consistent student journey..."

"Marketing is building trust with a new team but is held back by a long history of doing things differently and a lack of central processes."

Key issues

- Development or fundraising functions can be distant from marketing operations, yet synergy between these diverse functions will be beneficial to a strategic approach to organisational planning.
- Marketing does not yet play a consistent role in portfolio planning for many organisations leading to concerns that some organisations remain too product-led in what is an increasingly market-oriented sector.
- Less than half of respondents' are called upon to support corporate or business planning for the organisation as a whole, suggesting that marketing in UK higher education has some considerable distance to travel before it can be considered as a catalyst or driver of organisational strategic direction.

Part

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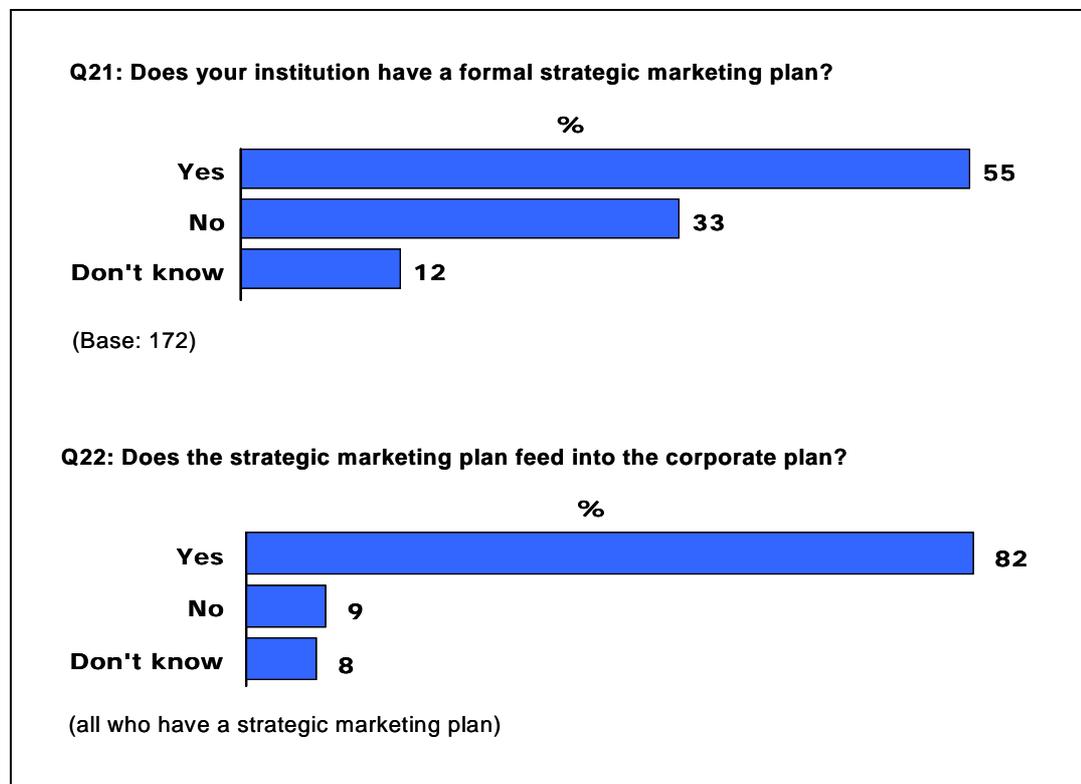
MARKETING DECISION MAKING

Context

The lack of formal marketing plans across organisations must be viewed as a critical concern for higher education.

This situation is reflected in the recent burst of activity to recruit to corporate affairs and corporate relations directorships at an increasingly strategic and influential level. The absence of a “governing” marketing strategy in many UK organisations is also an indication of task-driven marketing, in which organisations display a dominant focus on the immediate issues of student recruitment, for example, rather than requiring their marketing strategy to exert influence on corporate direction, competitive positioning and broader scale reputation management issues, for example.

Incidence and influence of formal strategic marketing plans

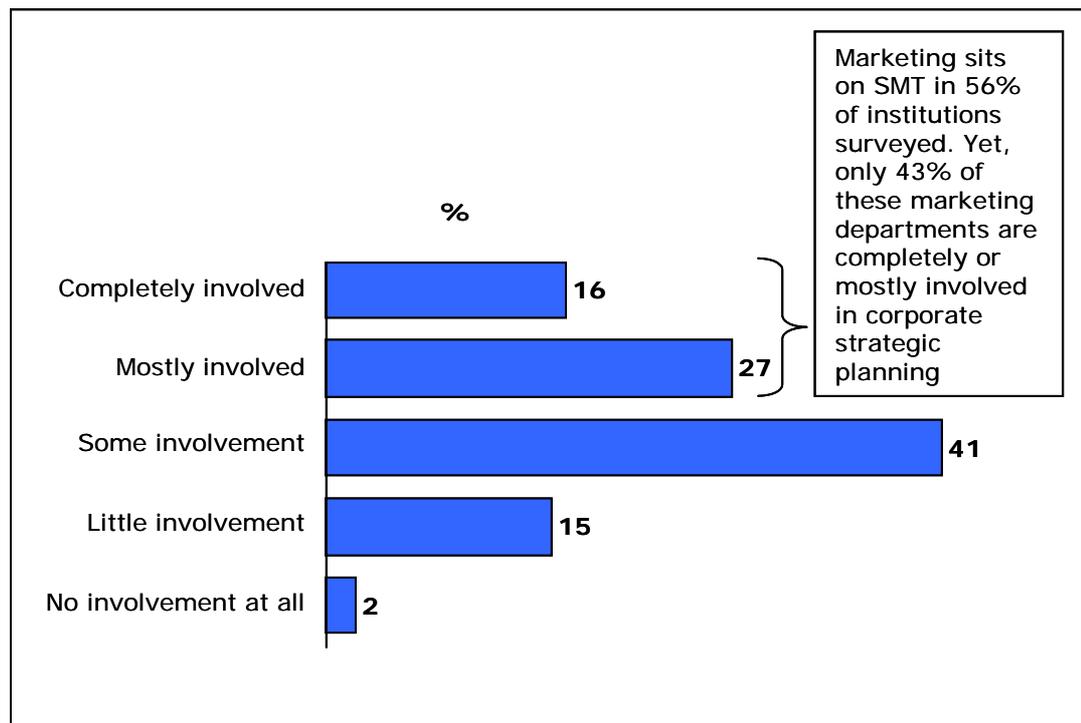


Key comments

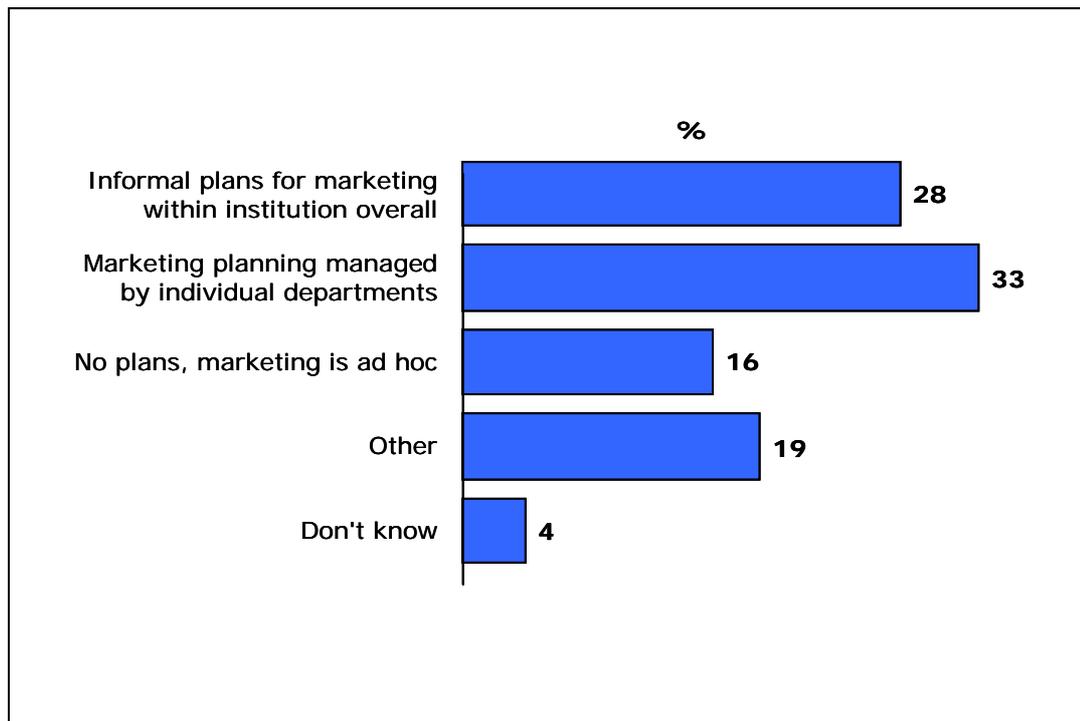
"The lack of input in relation to marketing within the University is contributing to the erosion over time of our competitive position, and a dilution of our reputation.

Senior management appear to pay lip service to the marketing function if they feel it provides a solution to a particular problem, but fail to appreciate the fact that future success, in an ever increasing competitive market, is dependent to a significant degree on marketing ourselves."

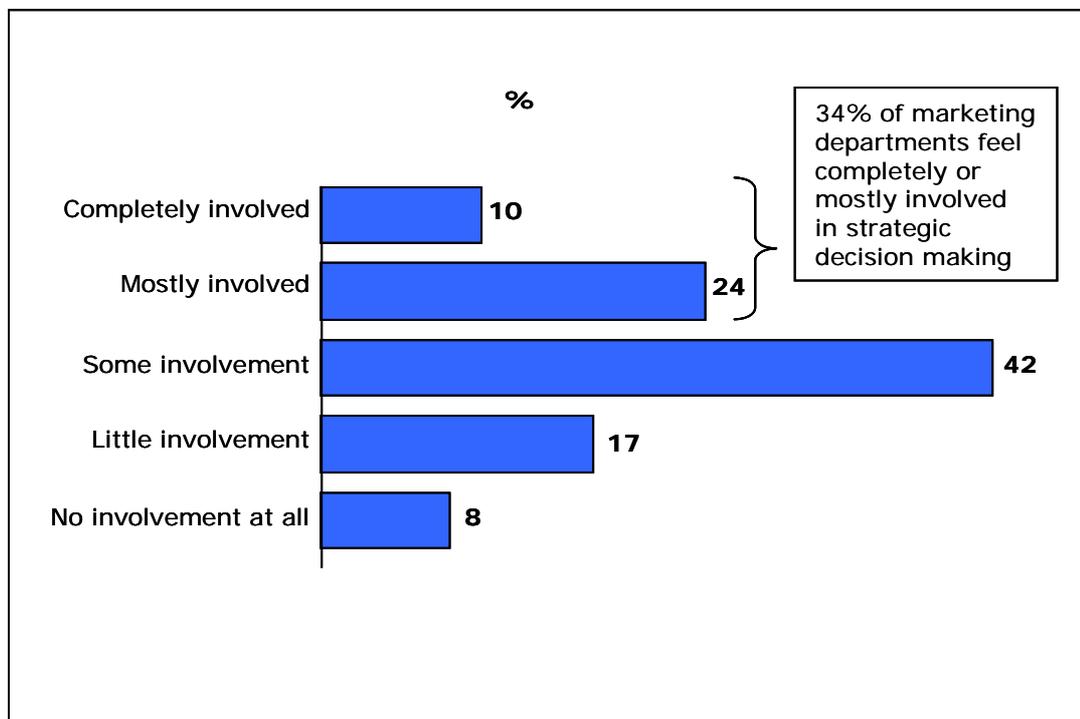
Central marketing department involvement with corporate marketing structure



Alternative if no strategic marketing plan



Marketing involvement in 'strategic direction' decisions



Key comments

“Unable to rethink marketing strategy in an institution where we have 8 or 9 applicants for every place, yet most of vast marketing budget devoted to getting yet more students to apply whom we then turn down”

“Marketing has, until recently, been very tactical and reactive. Demonstrating its value as a professional discipline has been a high priority over the past few months and is beginning to bear fruit.”

“Marketing is wholly attributed to Student Recruitment, Alumni relations / corporate relations although in reality it is not an integral component of the marketing function as it currently stands”

Key issues

- The relatively low incidence of a formal strategic marketing plan for many respondents' organisations is a critical concern for the sector at a time of increased competitive action on many fronts.
- Only 16% of respondents are involved closely with strategic planning.
- There is a concerning informality about marketing plans in some organisations, which suggests the potential for a lack of preparedness re: competitive action and emerging marketplace challenges.

Part

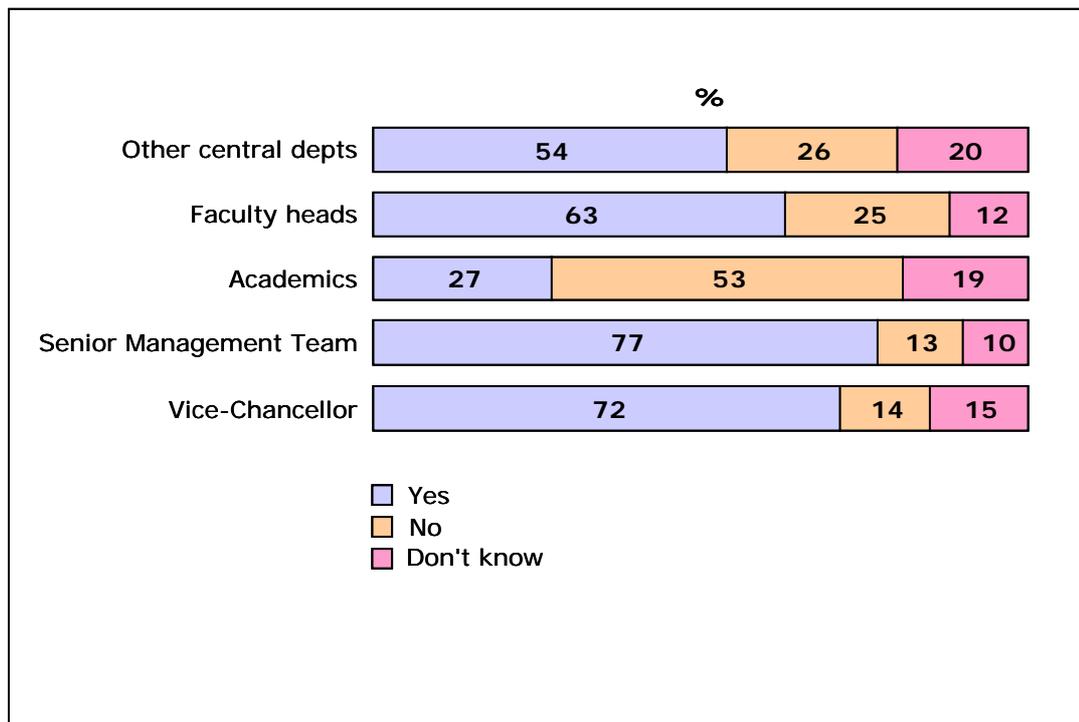
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MARKETING CULTURE

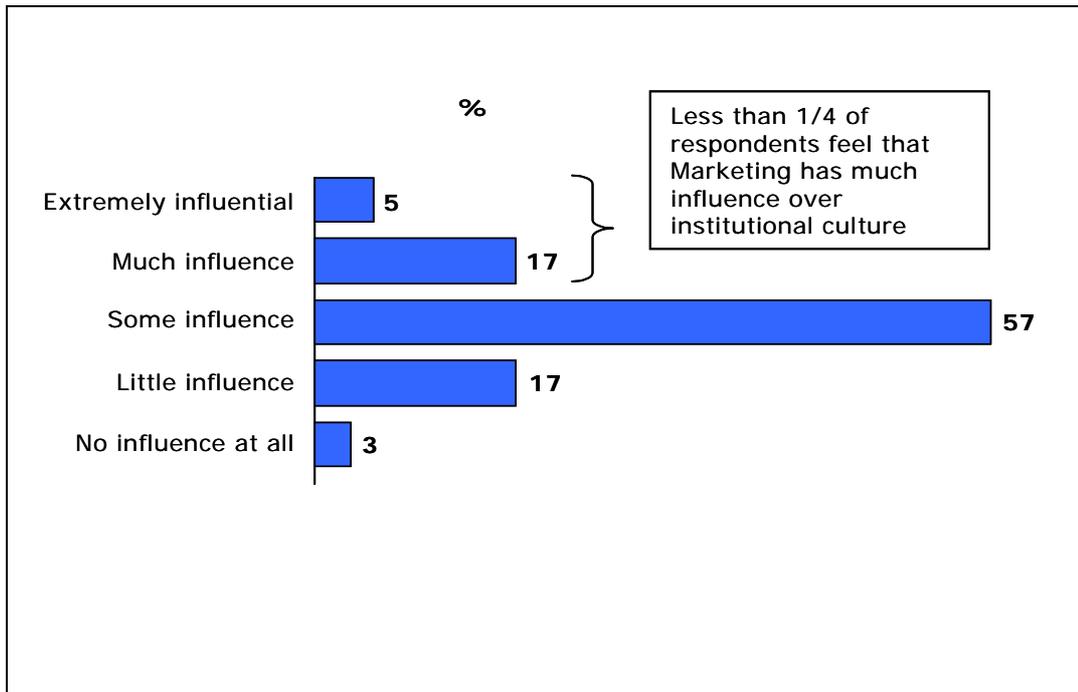
Context

How well marketing is received and perceived within organisations is directly related to its performance and interaction with internal stakeholders. When marketing is well understood and perceived to bring direct benefits, it is welcomed, and levels of a marketing-oriented culture rise. Where there is a gap in understanding, and especially so among academic colleagues and the student cohort, marketing is considered to by these stakeholders be less beneficial or purposeful.

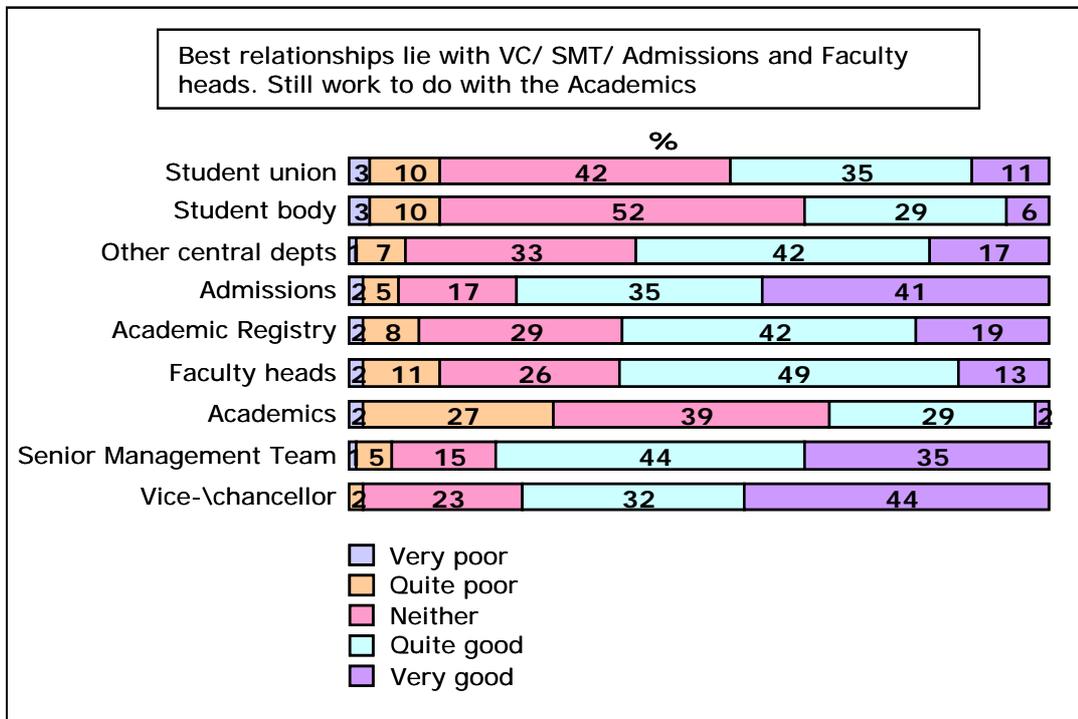
Is marketing perceived as being integral to achieving corporate objectives by...



Marketing influence on institutional culture



Marketing's relationship with stakeholders



Key comments

"There have been some visible successes but there is often an inappropriate level of academic involvement in marketing activities"

"Marketing has a high profile within the institution, and certainly has senior management support, however a good number of academic staff don't see the need for it, or don't want to engage with it."

"We have an excellent marketing department; while there will always be tensions between marketing and academics, most staff realise the importance of marketing in HE. The issue, however, is now about ensuring that the product lives up to the marketing."

"There is no doubt that marketing has a much higher profile in recent years - in part due to an awareness of the competitive context HEIs are now operating in. There is still much work to be done (particularly across the SMT) to clarify that "marketing" is not a synonym for "promotion" and that a commitment to marketing in corporate plans and strategies is fairly worthless without a realisation of how this translates into resources, or even a recognition that the SMT has a role to play in supporting and 'cheerleading' for marketing!"

Key issues

- Marketing as a function needs to be, itself, marketed to internal stakeholders to increase levels of positive awareness and understanding.
- Where internal stakeholders perceive real benefit, marketing thrives more readily.
- It is a concern that two key stakeholder groups, academic staff and the student cohort, do not always perceive the benefit of organisational marketing effort, especially when both groups are central to marketing an organisation's proposition and have the opportunity to benefit from successful strategic marketing activity.
- To succeed, marketing needs to be demonstrably relevant to stakeholders: marketing cannot be "done" to stakeholders but needs to be achieved "with" them.

Part

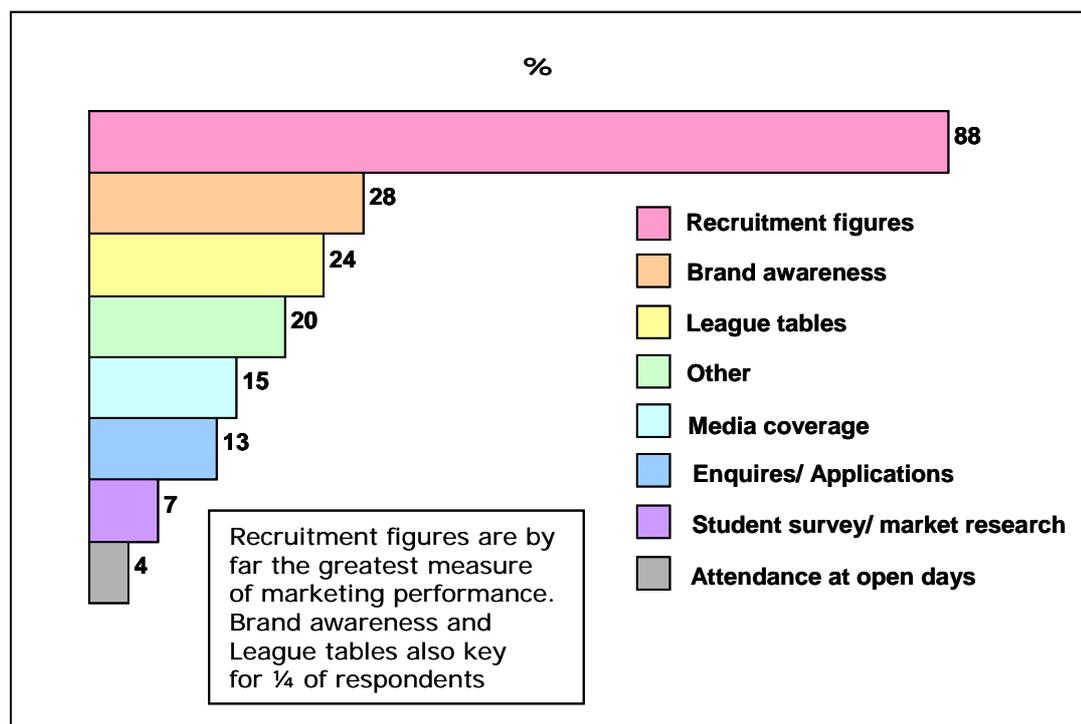
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CRITICAL SUCCESS FACTORS

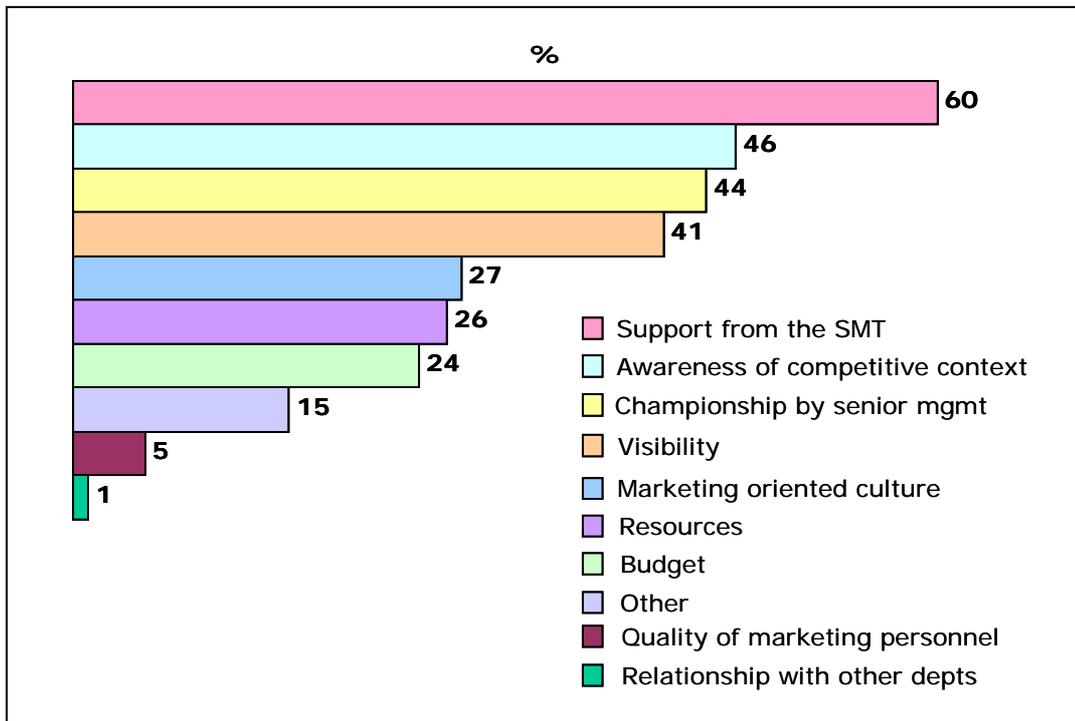
Context

Inevitably, marketing is often called upon to focus on the year-on-year tasks of student recruitment, possibly at the expense of the “bigger picture” challenges of reputation management, positioning and threatening competitive market issues. This link with readily apparent, tangible indicators of success does suggest, too, that marketing may become the “scapegoat” when recruitment does not go to plan.

How marketing performance is assessed



Making marketing a success...



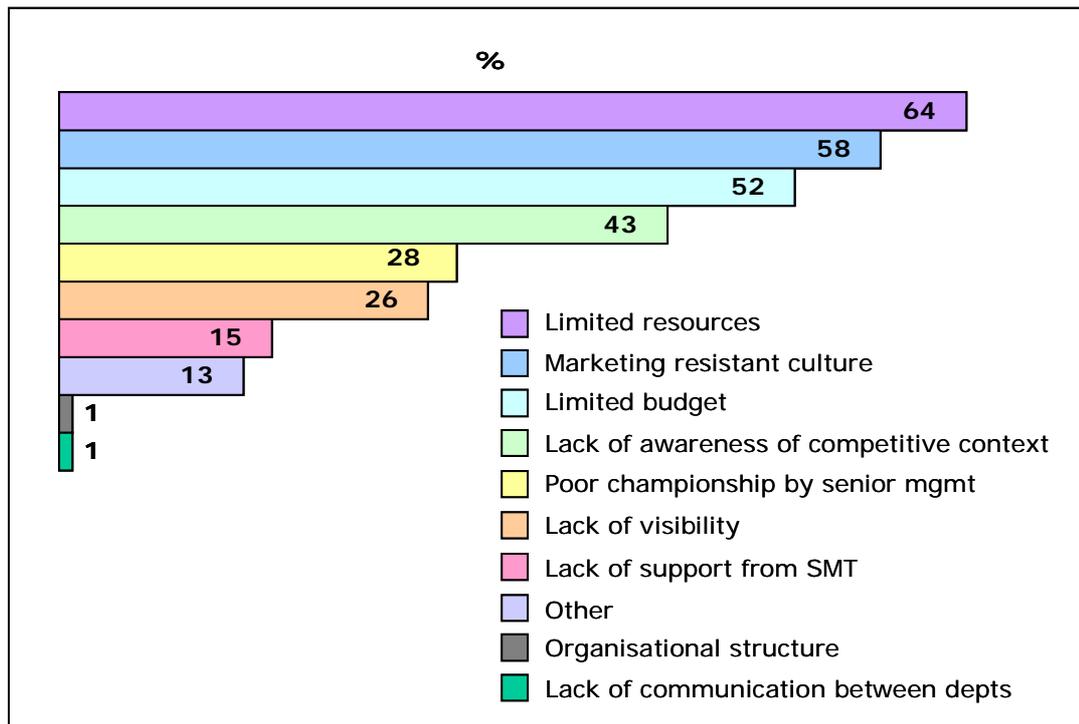
Key comments

"The marketing team has grown significantly in the last two years, the result of the Vice-Chancellor showing his confidence in us by giving us extra resources, and our delivery of results."

"There has been a recent re-structure which indicates a willingness to engage in a central marketing function rather than an ad hoc provision. However, there is still a long way to go before a marketing culture is taken up at the very top level of senior management."

"Marketing is easy to blame for shortfalls in recruitment..."

Marketing's barriers to success



Key issues

- Endorsement from the SMT and principal officers is the most significant factor in delivering support to, and for, marketing effort within organisations.
- Relatively, marketing is valued when organisations are realistic about their competitive challenges. However, it would seem that some organisations are still not realistic about the competitive environment in which they now operate, leading to a lack of investment (in terms of resources or belief) in the marketing function.

Part

9

IN SUMMARY

Emerging issues

- Marketing is not as engaged as it could be (or needs to be) in strategic planning.
- For only relatively few respondents, marketing may be deemed to be pivotal to strategic planning.
- Opportunities exist for marketing to be linked to corporate planning, but systems or the inefficient functionality of organisations often defeats them.
- Senior marketing staff often struggle with complex organisational systems.
- Levels of marketing input to corporate planning may seem to be influential but can be undermined by devolved structures and functions plus the lack of pragmatic influence or “marketing reach”.
- Some key organisational functions that would benefit from synergy with marketing (or by being more marketing managed or driven) are not always within marketing control or linked to a coherent and coordinated corporate marketing function. For example:
 1. Analytical planning
 2. WP
 3. Student experience
 4. Knowledge transfer
 5. International relations/profile
 6. E to B marketing etc
 7. Development
 8. “Total” reputation managementThis may lead to reputational and communications issues for organisations.
- Despite the influx of professional marketers from other sectors, HE organisations are not yet operating in a wholly market driven-way and significant barriers to satisfaction levels of new senior staff exist.
- 28% of respondents feel that marketing is completely or mostly embedded within the institutional structure.
- Only 55% of respondents reported that their organisations have a formal strategic marketing plan.

- A third of responses indicated that they cannot be sure where how their organisational marketing budget is spent.
- There is a significant instance of schools or faculties operating with autonomy from the centre, but how much synergy exists between these separate marketing activities? A proportion of such devolved activity will have developed due to a historic lack of support from the centre in “pre-marketing” times plus a real need for specialist marketing approaches to specialist portfolio areas.
- The top 3 goals for marketing are:
 1. To achieve numbers (59%)
 2. To increase profile (32%)
 3. To increase brand awareness (25%)
- Three quarters of respondents felt that the VC and the SMT are most likely to view marketing as integral to corporate objectives, yet it is felt that only 53% of academics share this view. Some student cohorts also appear to be disenfranchised from the marketing function.
- There is a constant need to engage academics and the student cohort in marketing activity and to demonstrate its relevance, return on investment and benefit to all stakeholders.
- Buy-in to marketing objectives and value at the SMT level is critical to marketing success as is the championship of marketing by principal officers.
- Marketing exerts a limited and varied influence on strategic planning. It drives, supports or informs some corporate objectives but rarely is able to deliver a 3 dimensional approach to strategy or business planning in higher education.
- An absence of a realistic awareness of the competitive sector context can restrict marketing influence and growth in UK higher education organisations, rendering them vulnerable to competitive challenges and market change.

Part

10

VERBATIM QUOTES FOR THE 2006 SURVEY

- *Although there is the Central Marketing department, many faculties also have their own marketing personnel. Sometimes this causes confusion and conflict because faculties can go off and do their own thing and not always follow the lead of the marketing department.*
- *Decentralised, not integrated, frustrating - no priority placed on marketing.*
- *In this predominantly FE institution marketing = publicity, ie. there is still a perception that the function of marketing is to produce prospectuses on time and within budget, issue effective press releases regularly and recruit effectively through schools liaison activities. Other activities are 'requested' if there are recruitment problems in general or in subject specific areas. There is no direct Marketing presence at Middle or Senior Management level so Marketing has no involvement in corporate development or strategic planning. Internal self- assessment of marketing 'effectiveness' is based on recruitment, performance within budget and achieving the publicity that academic colleagues request within given timescales.*
- *Insufficient visibility, although this is changing. Inadequate resources. Failure to take marketing sufficiently seriously at all levels outside External Relations.*
- *Introducing marketing into the university is like trying to turn a petrol tanker around; you move it a few metres and then it starts to drift back. Exhausting.*
- *It is a time of significant change. Marketing is increasingly high on the agenda but the challenge is to take a culture based on autonomous units and develop a coherent view where the corporate need is given due weight in local decisions. There is little appetite for compelling units to comply and so progress is through persuasion which can be slow.*
- *It is gaining credence and is a new department (8 months). We are working outwards and internal communication programme and formal mechanisms to discuss plans/ideas in the centre and in the schools. This has never been done before.*
- *It's an odd one. We are very centralised but what do those (with no disrespect) working centrally know about the customers situated within schools. Every school has a different customer based but we treat all schools and their students the same - what works for one school does not always work for another. We have lost sight of customers and need to start addressing both our potential and current customers as individuals.*
- *It's early days but we are heading in the right direction. Needs joining up. CRM now being introduced across whole university.*
- *Like many others, we are new to this game, and are running hard to get level! The resistant culture would be overcome if there were resources to throw at marketing, because academics would see results.*

- *Like many pre-92 universities we are coming to terms with the changing domestic and global context of higher education, and recognising that, perhaps for the first time, we are in a situation where we need to actively market ourselves rather than sit back and let students come to us. Our 'market focus' is reasonably new and we are still building structures and capacity.*
- *Major leaps forward in the past year - senior team receiving market reports that help to increase understanding of market imperatives. Current re-structure puts more people with marketing knowledge around the senior table - demonstrates a culture shift in the senior team, in the understanding of the needs of the institution Greater clarity of purpose/ambition of the University has made significant differences*
- *Marketing is new to us. Lots of cultural resistance however the tide is turning slowly and hopefully we can make an impact. Our Principal is 100% behind the department.*
- *Marketing department consistently fails over years to understand lifelong learning and the role of lifelong learners and related issues. Poor commercial sense. Unable to rethink marketing strategy in an institution where we have 9 applicants for every place, yet most of vast marketing budget devoted to getting yet more students to apply whom we then turn down.*
- *Marketing is becoming a top priority and changes for the better will occur once post holder in place.*
- *Marketing is easy to blame for shortfalls in recruitment. As a marketing unit we primarily market the college as a whole. Help will be given to any area who wants to promote their own course, but this is often not taken up.*
- *Marketing is recognised by a network of individuals within the University who are critical to student recruitment rather than necessarily people who are senior within the hierarchy. It works in spite of a culture that suggests that research quality is the only source of competitive advantage.*
- *Onwards and upwards - it's better than it was though hard work, but could be even better*
- *The marketing team has grown significantly in the last two years, the result of the Vice-Chancellor showing his confidence in us by giving us extra resources, and out delivery of results*
- *There has been a recent re-structure which indicates a willingness to engage in a central marketing function rather than an ad hoc provision. However, there is still a long way to go before a marketing culture is taken up at the very top level of senior management.*
- *There have been significant changes within the past 18 months and one hopes that within the next 18 months a fully integrated and centralised marketing function will exist.*
- *Very under-resourced over many years. First Head of Marketing appointed last year and this person is a promoted administrator with no marketing expertise. She just has one assistant, a new marketing graduate.*
- *We are at the start of a turnaround phase, and are gradually building up our central marketing resource together with its influence*
- *We are beginning to progress after a long period of stagnation.*
- *We manage to achieve a great deal with a very small team (1 + Assistant Principal.)*