The Road Scholar Brand stands for the reputation of our organization and our values. Our brand embodies the trust we have earned as an organization that delivers on its promises to our alumni, providers, donors and employees. The Road Scholar brand is strengthened or weakened by every presentation we make, in every catalog we produce and in every conversation we have about Road Scholar. These “touchpoints” are all opportunities to further imprint the meaning of our brand. This guide is intended to provide clear instructions to strengthen the Road Scholar identity by ensuring we all communicate with one voice to all audiences.
Our Elevator Pitch

“Road Scholar is the not-for-profit leader in educational travel for adults. A university of the world, we offer thousands of educational travel adventures around the globe, from studying art in Arizona to learning about zoology in Zambia.”

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Our Purpose
Our Mission
Road Scholar inspires adults to learn, discover and travel. Our learning adventures open minds to new ideas and deepen understanding of oneself and of the world’s peoples, places, cultures, history and environments. A true university of the world, not-for-profit Road Scholar’s meaningful – often transformational – educational adventures engage people for whom learning is the journey of a lifetime.

Our Vision
To change the world through learning and friendship.

A Diverse Group is a Dynamic Group
At Road Scholar, diversity is as integral to a dynamic educational community as it is to society in general. A multifaceted cohort enriches the learning experience, as participants from a wide range of backgrounds share with one another the wisdom and perspectives earned over a lifetime.
1975 Longtime friends Marty Knowlton and David Bianco have a revolutionary idea — weeklong university-level educational experiences for adults. They found “Elderhostel” and 220 pioneering participants attend the first programs on a handful of college campuses in New Hampshire that summer.

1980 We’ve grown from offering programs in one state to all 50, and most Canadian provinces. More than 20,000 participants experience a learning adventure with us this year.

1981 Participants cross the ocean to experience our first International learning adventures in Great Britain and Scandinavia.

1982 We launch the Annual Fund, giving donors who believe in our mission a way to support it. The Annual Fund enables us to develop new kinds of learning adventures, as well as offer scholarships for those who need financial assistance to participate.

1985 We continue to create new, innovative educational experiences. Our first programs for grandparents and their grandchildren take place this year; they’ll prove to be a huge hit.

1986 A little over a decade in and Road Scholar is booming — 100,000 adults join us for a learning adventure during this year alone!

1988 To spread our mission, we establish the first network of Lifelong Learning Institutes across the country. The network will eventually grow to 200 institutes.

1997 Our website is born and we soon become one of the first organizations to accept enrollments online.
1998  Ships and barges, which became our first floating classrooms in the mid-80s, are now so successful we set sail with our first Adventures Afloat catalog.

1999  Enrollments top 250,000 this year!

2001  The world truly becomes our classroom. We offer educational journeys in more than 100 countries.

2010  To appeal to new audiences and express the real essence of our learning adventures, we rename our programs “Road Scholar.”

2015  We celebrate our 40th Anniversary with 40 learning adventures around the globe in 2015, and create the Friendship and Learning campaign videos showcasing 12 stories of friendship and love that began or were enhanced by Road Scholar!

2016  We launch our new cutting-edge website.
Join a Road Scholar learning adventure and you will meet fascinating people who will learn together and share ideas, thoughts and experiences. There may be a high school music teacher from Palo Alto, a chemical engineer from Chicago, a retired nurse from upstate New York, a veteran, a volunteer or a man who just became a grandfather. Road Scholars come from all walks of life, but they have one thing in common: a love of learning.

Profiles of Typical Road Scholars
These personas are a way to put a face on our alumni, blending details of various people to create fictitious, representative individuals.

Judy
Age: 62
Lives in: Raleigh, North Carolina
Family/Home Life: Widowed, two grown sons
Road Scholar Class of 2015

Background: Judy retired at 60 from a career in computer consulting. She loves all the free time she has now and enjoys exploring new and old passions like quilting, volunteer work and fitness. She has a strong network of friends, but still enjoys meeting new people.

Road Scholar in Judy’s Life: A year before retiring, Judy took a tour to Alaska on a cruise ship. She had a good time but wanted a deeper educational experience and more cohesive group environment. Judy had heard about Road Scholar from friends and decided to learn more. She received her first Road Scholar catalog in the mail and was amazed at all the possibilities. She loved browsing the website to narrow her choices, and she was encouraged by all the reviews from other solo female travelers who said they felt warmly welcomed and cared for as part of the Road Scholar community. That led her to enroll in her first program to learn about the wildlife of Costa Rica. She chose that adventure because it offered more independent time, allowing her to explore on her own.
Max & June

Ages: 74 & 72

Live in: Goleta, California

Family/Home Life: Married, three grown children, seven grandchildren

Road Scholar Class of 2012

**Background:** Max, a retired physician, and June, who stayed home to raise their children, moved in their early 70s from the East Coast to California to be near their children and grandchildren. Retirement has offered Max and June the free time and resources to catch up on what they enjoy most. They are passionate about the opera, and June is on the board of a local art museum. They’re also members of their local Lifelong Learning Institute, where they take classes on a wide variety of topics.

**Road Scholar in Max and June’s Lives:** Max first heard about Road Scholar from a colleague, and he loves the idea of an organization that combines education and travel. June loves art, and when they took their first Road Scholar adventure to Paris after Max’s retirement, she was hooked. She especially liked meeting people who shared her interests. In a span of three years, they went on six Road Scholar learning adventures, three of which were Intergenerational. They plan on taking each grandchild on a Road Scholar Intergenerational program when each turns 10 years old. Max and June believe in Road Scholar’s mission and are always sure to make an Annual Fund donation when they call to enroll in a program. They’re even planning a private Road Scholar charter program with their whole family as a 50th wedding anniversary present to themselves.
Peter and Charlotte

Ages: 85 & 83

Live in Katonah, New York

Family/Home Life: Married, no children

Road Scholar Class of 1995

Background: Charlotte and Peter both taught high school for 35 years. Peter taught wood shop and Charlotte taught history, both passionate pursuits outside of the classroom as well. Peter enjoys refinishing furniture he picks up at tag sales, and Charlotte has spent years chronicling her family’s genealogy. They continue to pursue their interests, although a little less zealously than when they were younger. Both love reading, listening to NPR and watching their local Public Television programs.

Road Scholar in Charlotte and Peter’s Lives: Charlotte and Peter used their free time over their summer vacations to attend Elderhostel (and now Road Scholar) learning adventures, often taking several consecutively. They have attended more than 100 programs! Apart from a program to learn about archaeology in Egypt (a lifelong dream of Charlotte’s), all of their Road Scholar adventures have been in the United States. Every year in the fall, they have attended a Road Scholar program in New Hampshire, where they study a variety of topics. They love having everything included in the price, so they can focus on their learning experience. Road Scholar is such an important part of their lives that, they have named the organization as a beneficiary in their wills.

Road Scholars have a love of learning

- 84% have a bachelor’s or higher degree
- 36% have a master’s degree
- 12% have a doctorate or a professional degree
How We Want to Make Road Scholars Feel

Challenged • Empowered
Enriched • Inquisitive
Inspired • Intelligent • Savvy
Scholarly • Transformed

Adventurous • Boundless
Interesting • Worldly

Connected • In touch
Included

Appreciated • Cared for
Embraced • Encouraged
Loved • Respected
Safe • Valued • Vital

All in • Grateful • Happy
Invigorated • Living a Dream
Pace of the program
We take great care in pacing every program to maximize the learning experience — and the comfort level — of the syllabus/itinerary.

Activity level
Road Scholars want to know exactly what to expect. Will they be able to manage the physical requirements of the trip or be challenged enough by the pace to meet their own desire for physical adventure? Will they be in their comfort zone? It’s important that we convey a detailed description of physical expectations for every program. These clear guidelines will ensure that participants enroll in the program that’s right for them.

The group
Road Scholars want to feel they are in a cohort of learners, not in a tour group. Road Scholar programs are academic adventures, not migrating herds.

Traveling solo
Of all people who are considering trying Road Scholar, singles are the most courageous. Will they make friends? Feel a part of something? Have others with whom to share the experience? Everyone at Road Scholar can be confident in assuring singles, particularly solo female travelers, they will be comfortable and welcomed on a Road Scholar adventure.

What’s included
We handle all the details so our participants don’t have to. Road Scholars don’t want the hassle of having to calculate the unexpected.

Great value
Road Scholars know there may be cheaper options out there, just not better options.
What Sets Us Apart: Our Key Differentiators

We’re a university of the world.
With programs across the U.S. and around the globe, Road Scholar offers the greatest collection of educational travel adventures on earth. Think of us as a university of the world. From Arizona to Antarctica, from Buenos Aires to Bangkok, from the Southern Hemisphere to the Northern Lights, each of our 5,500 educational travel adventures takes learning to a new dimension.

Focus on experiential learning
Road Scholar programs are experiential learning adventures, not travel tours. Road Scholars gain richer information than “the Eiffel Tower is 986 feet high.” The knowledge they gain during a Road Scholar experience is deep, thought-provoking and delivered by “faculty experts” on the site and/or the subject.

Not-for-profit
Road Scholar is a not-for-profit organization created for the enrichment of adults dedicated to lifelong learning. We work hard to keep prices down and provide financial assistance to help offset the costs for those with financial constraints. We don’t judge the success of a program by profitability alone — we may make a decision based on educational value and the experience of our participants.

Engaged and intellectually curious participants
Road Scholar programs create a vibrant learning dynamic by bringing together a cohort of voracious lifelong learners. The chemistry resulting when participants learn from one another, from the program leader and from the subject experts and locals met along the way distinguishes Road Scholar experiences.

Camaraderie & friendships
Whether traveling with friends, with a partner or as a solo female traveler, Road Scholars are embraced by a warm, inclusive community that bonds easily
over shared interests and a love of learning.

Serving “Boomers & beyond”
Road Scholar creates learning adventures geared to specific groups of lifelong learners, so that each demographic can embark on an unforgettable learning experience.

Insider’s perspective
Road Scholar adventures take participants inside a destination or topic to provide an authentic learning perspective. They investigate hidden aspects of cities that only the most seasoned locals know about and often explore museums and historic sites when those locations are closed to other visitors.

Passionate alumni
Loyal Road Scholars feel they belong to a rich learning community and are members of a Road Scholar class (the year of their first program). They align themselves with our mission, philosophy and values. Our excellent Net Promoter Score illustrates the loyalty that our participants feel for our organization.

Value
The all-inclusive nature of our programs provides great value and encourages Road Scholars to return for other adventures. Our savvy participants recognize that they could not duplicate the value we offer on their own.

Group leaders & instructors
Road Scholars arrive on a program as strangers and leave as lifelong friends. Our group leaders help make this possible by creating a safe, inspiring and welcoming environment. Our instructors offer insights that can’t be found in guidebooks. Road Scholars learn from leading experts like Nigel West, one of the world’s foremost authorities on Cold War espionage, and James D’Alessandro, an accomplished author, screenwriter and filmmaker.

Customer service
Road Scholar Advisors immediately put callers at ease and make them feel that they are in the best of care. They are experts in the 5,500 learning adventures we offer.
Is Road Scholar an academic experience or a tour group?
Our principal differentiator is that we offer educational experiences, not tours. Traveling is just a means to get to our programs, never the purpose.

Is there an age minimum?
While there are no age requirements or restrictions, Road Scholar adventures are geared to adult lifelong learners typically 50 and older. For Marketing purposes we like to say, “For Baby Boomers and beyond.” By offering an age guideline, prospective participants will understand that they will be with cohorts who have a similar frame of reference in their lives.

Why is Road Scholar a not-for-profit?
Much like many colleges or universities, Road Scholar is a not-for-profit organization with an educational mission. We have no owners or shareholders. Instead, any surplus we generate is reinvested in our mission, enabling us to fund and develop an extraordinary range of learning adventures for as wide an audience as possible. Donors who believe in our mission support us through contributions.

Is Road Scholar expensive?
We think travel author Arthur Frommer said it best about us: “The emphasis is always on learning, and the cost of participation is far below commercial levels.” Apart from our educational focus, what
makes Road Scholar so unique is that we include most everything in the price of our programs. Why do we do this? Because a learning experience should include every element that is key to the curriculum. You shouldn’t have to pay extra to enter a museum or to visit a must-see icon that will enhance the learning experience, so we include everything we believe is essential to the learning adventure. That way our participants can concentrate on their experience and not worry about paying for extras. While you can never really compare a Road Scholar educational adventure with a commercial group tour, we hear from Road Scholar participants who come back from commercial tours and report they ended up spending much more than they expected on the “lower-priced” tour because of the cost of all the optional activities.

<table>
<thead>
<tr>
<th>Why support Road Scholar?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Road Scholar is like no other organization ever. Think of us a university of the world for older adults. Our mission is to open minds to new ideas, to different people, places, cultures, history and environments. Like all not-for-profit colleges and universities, we ask those who benefit from our services and those who believe in our mission to support us.</td>
</tr>
</tbody>
</table>
Our Written Identity
Our tone is characterized by a relaxed, casual, upbeat feel. Contractions are used frequently (when appropriate) and our participants are addressed directly rather than in the third person. Overall, our communications reveal we are a friendly, dynamic, efficient organization dedicated to people who love to learn.

The Road Scholar tone should have the following qualities:

- Approachable
- Authentic
- Straightforward
- Low-key
- Confident
- Upbeat
- Honest
- Welcoming
- Reassuring
- Encouraging

### Writing Examples:

<table>
<thead>
<tr>
<th>Off tone (third person, formal, impersonal)</th>
<th>On tone (first person, upbeat, inviting, contractions, informal, short, direct)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participants will be sent their itineraries if they request them by submitting this form.</td>
<td>We’ll be happy to send you your itinerary. Just drop us a line at <a href="mailto:contact@roadscholar.org">contact@roadscholar.org</a>.</td>
</tr>
<tr>
<td>An online review can be submitted at the conclusion of the participant’s program.</td>
<td>What did you think of your adventure? We’d love to hear from you! Log on to your account at roadscholar.org and leave us a review.</td>
</tr>
<tr>
<td>During periods of high call volume or outside of business hours, customers may leave a voicemail with their inquiry and a representative will respond at the first available opportunity.</td>
<td>We’re here to take your call M–F, 8 a.m.–7 p.m. ET. If you can’t call then or if we’re helping another participant, just leave us a message and we’ll get back to you as soon as we can.</td>
</tr>
</tbody>
</table>
### Words We Love — And Words We Don’t

<table>
<thead>
<tr>
<th>Words to use</th>
<th>Words to avoid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning adventure, educational adventure, adventure, program, journey, expedition, study cruise, voyage, trip (trip is acceptable, but must always be used in a learning context)</td>
<td>Tour, vacation, cruise</td>
</tr>
<tr>
<td>Lecture, presentation, field trip, excursion</td>
<td>Sightseeing, sights, attractions, guided, guided tour</td>
</tr>
<tr>
<td>Faculty, instructor, group leader, local expert</td>
<td>Guide</td>
</tr>
<tr>
<td>Road Scholars, participants, Lifelong Learners, alumni</td>
<td>Tourist, senior</td>
</tr>
</tbody>
</table>
Sample ambassador letter for speaking engagement inquiry:

Dear (Name),

Road Scholar would like to offer a unique and complimentary programming opportunity to you and your (name of organization). I am a member of the Road Scholar volunteer speakers’ bureau, the Ambassador Program. We are a group of seasoned Road Scholar participants who volunteer our time to give informative and enthusiastic presentations about the educational travel adventures available through Road Scholar.

Road Scholar is a university of the world and the leading not-for-profit educational travel organization providing learning opportunities specifically for adults. Each year 100,000 alumni join us in 5,500 programs across the United States and 150 countries. As a not-for-profit organization, we are committed to being the preeminent provider of high-quality and affordable educational opportunities for adults.

In Road Scholar’s early days, interest was spread rapidly through word-of-mouth, from one friend to another. As Road Scholar Ambassadors, we continue this tradition today by sharing Road Scholar with the people in our communities. As a service to you, I would be happy to make a presentation for your organization. To arrange for a Road Scholar presentation, please call me at (your telephone number) or e-mail me at (your e-mail address).

If you would like to learn more about Road Scholar and the Ambassador Program, please visit the Road Scholar website at www.roadscholar.org.

Sincerely,
(Your Name)
Road Scholar Ambassador
Our Visual Identity
The Road Scholar logo appears in very specific design that never changes. The logo is not text, it is an artfile. Reproduce signatures only from authorized files.

The Road Scholar logo can appear in red, black or white. When placed on a light background, the red or black logos should be used; when placed on a dark background, the white logo should be used.
Maintain a clear space around every signature. The zone is defined by the height of the letter ‘R’ in Road Scholar. No graphic element, type or photo should appear inside this space. Maintaining the clear zone around a signature ensures visual clarity and legibility.
Incorrect Use of Signatures

Consistent use of our signatures builds recognition and credibility for our brand. Do not recreate signatures, change typefaces or distort the proportions of the signature. Do not add benefit statements or create taglines or promotional messages. Do not place signatures on photos or patterns. Do not enclose signatures in shapes or add decorative borders.

- Logo is typed instead of used as a graphic.
- Logo is distorted.
- Logo is green.
- Text/graphic inside signature clear zone.
- Logo is placed on top of a pattern.
Primary Branding Colors

- PANTONE 187
- BLACK

Secondary Branding Colors

- PANTONE 188
- PANTONE 300

Color Codes:

PANTONE 187 (C=85, M=65, Y=45, K=15)
PANTONE 300 (C=8, M=1, Y=1, K=0)
Typography plays an important role in the Road Scholar brand identity.

Merriweather — (for body copy)

ABCDEFGHIJKLMNOPQRSTUVWXYZ
defghijklmnopqrstuvwxyz

Source Sans — (for headline copy)

ABCDEFGHIJKLMNOPQRSTUVWXYZ
defghijklmnopqrstuvwxyz

If you do not have access to the above fonts, please use:

Adobe Caslon — (for letters and fundraising)

ABCDEFGHIJKLMNOPQRSTUVWXYZ
defghijklmnopqrstuvwxyz
**Letterhead**

Road Scholar stationery plays an important role in communicating the Road Scholar brand image. Our stationery communicates a clear, unified and consistent image.

**PowerPoint**

How we visually deliver information is just as important as what we’re saying. That’s why we’ve created a vibrant yet flexible PowerPoint template. In order to accommodate the differing needs of a broad group of PowerPoint users, the master template was built with a variety of slide options.
Representing Road Scholar
Delivering Ambassador Presentations
As a spokesperson for Road Scholar you should focus on educating and reaching out to baby boomers and beyond by developing, launching and maintaining a proactive word-of-mouth effort in your community. Make your presentations unique and enjoyable. Present a current and exciting image of Road Scholar by wearing your Road Scholar polo and lanyard at Ambassador presentations and booth events.

On Social Media
We encourage staff to follow Road Scholar on Facebook, Twitter, Pinterest and YouTube. If you are inspired to post a comment, be sure to have the best intentions of our organization in mind.

On a Road Scholar Program
Staff that attend Road Scholar programs can be the best brand ambassadors. We hope that when your program ends, participants have an even better impression about Road Scholar after having spent time with you. Please remember that all information regarding the operations of Road Scholar programs is sensitive information and not to be shared with anyone, including the participants, Program Provider and group leader.
Solo participants
Road Scholar is trusted and well-known for offering a warm and welcoming atmosphere for couples and solo participants alike, particularly solo female travelers.

You very likely won’t be the only person without a partner.

Not like group travel but more like a college cohort, everyone possesses the same thirst for knowledge.

You don’t have to share a room — single room options are available.

Solo travelers often make lifelong friends.

The atmosphere you’ll find is of learning in the company of a small group of individual friends, rather than traveling with a collection of couples.

You’ll have lots in common with others — usually the same general age and interests — unlike traditional group travel experiences.

We make adventures to off-the-beaten-path destinations safe, fun, exciting and worry-free.

Our not-for-profit status ensures a focus on the educational component, not the bottom line.

Our adventures are carefully paced for optimal comfort and learning.

Retirees
Retirement is the time to get serious about the things you’ve always wanted to learn.

Road Scholar brings together a cohort of dynamic lifelong learners who share their wisdom and experiences while building their knowledge on subjects of common interest.

Some people are busier than ever at retirement and Road Scholar understands this. We take care of all the details so you don’t have to.

Unlike traditional group travel experiences, Road Scholar adventures are carefully paced for optimal comfort and learning.

The focus is on learning all you can about a place or subject as you journey to exciting destinations with some of the world’s most knowledgeable experts.
Road Scholar’s not-for-profit status means we concentrate on the educational experience, not the bottom line.

We clearly state our activity levels — from highly active adventures to the more relaxed.

**Boomers still on the job**
You have never been so busy. You need a rejuvenating experience, but have no time to plan one. We have you covered.

A Road Scholar learning adventure is so enthralling, so compelling, so absorbing, that you can leave professional or personal demands behind and reinvigorate yourself.

Forget everything you ever knew about group travel, because Road Scholar bears no resemblance. Road Scholars are like-minded explorers finding out about the world from subject and location experts in some of the most compelling places on earth.

Our not-for-profit status means we concentrate on the educational experience, not the bottom line.

You build on the wisdom and knowledge you have absorbed over the years through our educational adventures.

Unlike traditional group travel experiences, Road Scholar programs are carefully paced for optimal comfort and learning.

As a not-for-profit organization, we are dedicated to optimizing learning experiences for all adults, leading advances in educational travel, and offering scholarships to offset costs for those whom travel is a financial challenge.

**Intergenerational/Family**
Think how you would have treasured an experience like this as a child in the company of a beloved grandparent. It will be an experience your grandchild will reflect on for the rest of his or her life.

Expand their horizons — knowledge of the world will help them in their academic and professional careers.

Enjoy uninterrupted time with loved ones who all lead busy lives. You’ll have more life-changing quality time than you could arrange through any other experience.

Intergenerational experiences are complex to arrange — that’s what we’re here for.
“How do I begin to tell the many levels of wonder and joy and personal understanding that were given to me? This has really been a program that has changed my life. I love to learn, be in nature and visit new places. You have made all this, and much more, possible.”

— SUSAN A., LAS CRUCES, N.M. ROAD SCHOLAR CLASS OF 2010