IOWA STATE UNIVERSITY
OF SCIENCE AND TECHNOLOGY

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October 21, 2025

To: Michele Appelgate, Director of Marketing and Communications, Ivy College of Business
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Breehan Gerleman, Director of Communications and Marketing, College of Engineering
Dave Gieseke, Communications Director, College of Veterinary Medicine
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Dwaine Heppler, Associate Vice President, Human Resources Service Delivery and Strategy, University Human Resources
Emma Mallarino Houghton, Director Compensation and Talent Acquisition, University Human Resources
Amy Juhnke, Communications Director, College of Liberal Arts and Sciences
Brian Meyer, Associate Director, Strategic Communications, University Marketing and Communications
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Brittney Rutherford, Communications Director, College of Health and Human Sciences
Heather Sauer, Director of Strategic Communications, College of Design
Tracy Schlater, Manager of Marketing and Brand Development, Iowa State Online
Rob Schweers, Director of Communications, Senior VP and Provost
Andy Zehr, Director of Communication and Marketing, College of Agriculture and Life Sciences Communications

From: Wendy Wintersteen, President, Iowa State University

I want to commend all of you who served on the Optimized Marketing and Communications Operating Model Working Group for your time, dedication and thoughtful contributions to the draft proposal sent to me by Carol Heaverlo on September 30.

Your draft proposal was comprehensive and included a far-reaching set of recommendations. I was pleased to see that several reinforced some of the recommendations received from The Segal Group early this year. I met with Carol, Brian Meyer and Jacy Johnson on October 2 to discuss the draft. I made a few suggestions, primarily in wording; the most notable being moving the idea of "Centers of Excellence" from an appendix into the main body of the proposal and renaming them "Specialized MarCom Hubs." With my suggestions incorporated, the final version of your proposal is included in this memo.

I would like to outline what I am accepting from the eight key recommendations in the final proposal:

1. Stronger Reporting Relationships Between Division and College Leads and University Marketing and Communications

Included in this category was a proposal to establish solid-line reporting relationships connecting the senior/key marcomm leaders of the seven academic colleges, plus a few other units, to University Marketing and Communications. It also proposed dotted-line relationships be established between the four division senior communications leaders and University Marketing and Communications.

An essential point made in the proposal stood out to me: ". . . building capacity and improving coordination through foundational improvements are as important as adjusting reporting lines." I fully support this perspective, and that coordination must be defined by strategic thinking.

After discussions with senior leaders, including the deans, I decided that now was not the right time to recommend changes to solid-line reporting, which would have likely required a major reorganization across campus.

Instead of solid-line reporting relationships, I am supportive of and am recommending that the university implement dotted-line reporting relationships between the seven academic college marcom leaders and University Marketing and Communications. I accept the working group's recommendation of dotted-line relationships of the four divisional marcom leaders with UMC. I am confident that a dotted-line approach will foster greater coordination and alignment that moves us closer to my stated ideal of "One University" for strategic communications and marketing.

The proposal also included adjusting the reporting lines for marcom leaders in Admissions, Iowa State Online and Extension and Outreach. I believe it is best to defer this decision for Admissions and Iowa State Online. As for Extension and Outreach, a new partnership is under development that would link Extension and Outreach's marcom staff with Associate Vice President Jacy Johnson's unit, strengthening its capacity and capabilities to fulfill strategically important priorities for the mutual benefit of both units.

For dotted-line reporting relationships to succeed, the roles, responsibilities and duties must be clearly defined and mutually agreed upon by the supervisors in the division or college and the supervisors of University Marketing and Communications. Each dotted-line relationship must be clearly articulated, as responsibilities may vary unit to unit. Details of these partnerships should include these, and other, considerations:

Strategic alignment with institutional goals. Enhances visibility and influence by positioning colleges within the university's strategic narrative. Ensures college marcom leaders and professionals have a voice in university-wide strategic visioning and planning. Guarantees messaging is aligned with university priorities such as enrollment, advancement and branding.

Support for issue management. Provides consistent, timely support as issues emerge, protecting the university and college brands. Connects college professionals to university crisis teams and protocols, leading to better communication strategies and deeper understanding of university positioning on key issues.

Access to additional resources and best practices. Reduces isolation, duplication of effort, and lack of awareness of existing resources. Offers enterprise-level tools, analytics, campaign strategies, and metrics to enhance effectiveness. Facilitates onboarding and mentoring for new marketing and communications staff. Improves access to analytics and stakeholder insights for more impactful college-level strategies. Streamlines marketing and trademark approvals through greater familiarity with guidelines and supporting resources.

Shared planning for increased efficiency. Promotes collaboration and resource sharing, reducing redundant efforts across colleges and units. With heightened competition for students and donor dollars, strategically optimizing university marketing and communications is increasingly essential. Shared services and subscriptions can yield cost savings, and repurposing content across audiences and channels increases operational efficiency. Streamlined workflows free up time for proactive content creation.

Amplified reach and visibility. Coordinated efforts will amplify college stories and achievements, extending their reach through university communication channels. Stronger alignment with messaging and branding ensures colleges benefit from university brand-building initiatives, such as the "Start Something" network.

2. Establish Stronger Reporting Relationships for MarCom Staff Within Divisions and Colleges

This category recommended solid-line reporting relationships be established within each division and college, connecting marcom staff at many levels to each college or division's central marcom leader. I am not recommending adoption of this step at this time. Staff reporting relationships or structures within divisions and colleges will remain the prerogative of each division or college.

3. Establish Formal, Strategic Governance and Coordination Councils
4. Develop University-Wide Strategies to Align MarCom Efforts

I accept the working group's set of recommendations in the third and fourth categories. They include these key items:

- Establish a University MarCom Strategy Council; a Brand Governance Council; and a University MarCom Network.
- Develop and adopt a university policy on marketing and communications applicable to all university employees for inclusion in the ISU Policy Library. (Please note that I suggested moving this recommendation here instead of the fifth category; that change is reflected in the final proposal.)

- Implement a university social media strategy that strengthens brand visibility, fosters authentic engagement, and ensures consistency across all units
- Work more closely and collaboratively on student recruitment marketing strategy and internal communications strategy

Recommendations 5-8
The remaining recommendations involve university standards and guidelines; efforts to build capacity; HR functions in hiring and onboarding marcom professionals; and improving alignment and coordination. I ask Associate Vice President Jacy Johnson to continue to review these recommendations with campus partners and how they may be considered, prioritized or adopted in the future.

I ask Associate Vice President Johnson to develop an implementation plan on the accepted recommendations, and especially to work with University Human Resources for guidance on establishing the dotted-line reporting relationships.

Thank you again for your hard work. These are important steps in the One University approach. I want to emphasize that, although it was my decision to initiate the assessment that produced the Segal Group recommendations, it was meant as a "future of Iowa State" institutional priority — about positioning our university to be in a much better, more strategic place for years to come. Your efforts are part of our progress.

Cc: Jason Keith
Toyia Younger
Sean Reeder
Kristi Darr
Jason Henderson
Jacy Johnson
Jacy Johnson

IOWA STATE UNIVERSITY
OF SCIENCE AND TECHNOLOGY

Iowa State University

Optimized Marketing and Communications Operating Model Working Group

Final Recommendations

October 2025

Introduction

In June of 2025, in response to Recommendation #1 (Optimize the organizational structure) in the Communications and Constituent Engagement Assessment consulting report, President Wendy Wintersteen charged a broadly representative working group (see Appendix A) to develop a draft proposal for review by senior leaders. The draft proposal, due on September 30, 2025, was expected to outline options for an optimized, networked and/or formally connected organizational model for university marketing and communications (MarCom) efforts. In developing its draft, the working group was asked to focus specifically on The Segal Group's recommendation:

Increase collaboration, consistency and accountability by considering the feasibility of a hybrid staffing model across all colleges, Extension and Outreach, Admissions, and other relevant units, in which local communicators have a matrixed reporting relationship to their unit leaders and the central university marketing and communications unit.

The working group met regularly from June through September 2025 to examine challenges (see Appendix B) and explore potential options. To inform its deliberations, the group reviewed marketing and communication models at peer universities and heard presentations from Iowa State University (ISU) units that have adopted structural or coordination strategies to improve alignment in University's highly decentralized environment. These units included the ISU Foundation, Admissions, Human Resources, and Information Technology Services.

Working Group Recommendations

The working group began its deliberations with a strong focus on designing an optimal organizational structure. It quickly concluded, however, that building capacity and improving coordination through foundational improvements **are** as important as adjusting reporting lines. To better position the university and its MarCom professionals for success, the working group recommends the following:

1. Stronger Reporting Relationships Between Division and College Leads and University Marketing and Communications

While the working group achieved consensus on recommendations 2-8, there was not consensus on reporting relationships. Some working group members cited the highly varied responsibilities that marcom professionals hold throughout the university and requested further consideration rather than recommending a standardized approach. The majority of working group members recommended the following:

- **1a**. Establish solid-line reporting relationships for the senior (or key) MarCom leaders of the seven academic colleges to University Marketing and Communications, with dotted-line reporting to their respective senior vice presidents, deans or other senior leaders.

- **1b.** Establish solid-line reporting relationships to units with university-wide and strongly externally focused marcom priorities/responsibilities, e.g., Admissions, Extension and Outreach, Iowa State Online, etc.

- **1c.** Reinforce these new arrangements through strategic agreements that clearly define service responsibilities and expectations, clearly define success and outcomes, outline resource expectations, and specify conflict resolution protocols. MarCom leads should continue to be located within the organizations they serve.

- **1d.** Continue strong relationships between the four division senior communications leaders and University Marketing and Communications, via the Communications Leadership Cabinet, a resource for university senior leaders and for campus marketing and communications leaders to address university-level communications challenges and opportunities. Establish dotted-line relationships between division marcom leaders and University Marketing and Communications, based directly on their marcom responsibilities.

2. Establish Stronger Reporting Relationships for MarCom Staff Within Divisions and Colleges

- **2a.** Establish solid-line reporting relationships for full-time MarCom staff within each division and college to the division or college MarCom leads. These staff may be based within departments, centers, institutes, programs and other smaller units. Establish solid-line reporting relationships to the college or division lead for student workers (undergraduate and graduate) with MarCom responsibilities.

- **2b.** Other staff may not fall within established job profiles directly related to marketing and communications, yet a fraction of their responsibilities include performing ongoing MarCom duties or projects. These staff should have dotted-line relationships to the division or college lead for their marcom responsibilities.

- **2c.** Begin to discontinue the practice of hiring staff with fractional MarCom responsibilities.

3. Establish Formal, Strategic Governance and Coordination Councils

- **3a. Brand Governance Council**. Appoint a cross-functional group with rotating membership to uphold brand standards, ensure compliance, and maintain institutional alignment.

- **3b. University MarCom Strategy Council**. Establish a council of key or senior MarCom leads from across campus and including the Alumni Association/Foundation. Led by University Marketing and Communications, this Council would work to align priorities, guide strategy, share best practices, and coordinate campaigns.

- **3c. University MarCom Network**. Create a university-wide network to connect all staff with MarCom responsibilities to promote collaboration, support professional development, and strengthen accountability.

4. Develop University-Wide Strategies to Align MarCom Efforts

- **4a. University Policy on Marketing and Communications**. Develop, adopt and add to the ISU Policy Library a clear policy defining standards for university messaging and representation to strengthen awareness, reinforce accountability, reduce risk, and safeguard the university's reputation.

- **4b. Provide Broader Education About Marketing, Communication, and Branding**. Offer targeted education and awareness programs for faculty and staff to promote best practices, consistency, and alignment with institutional strategy.

- **4c. Internal Communication Strategy**. Develop a structured approach that defines clear communication channels, establishes expectations for information flow between central and unit offices, and incorporates feedback mechanisms to ensure faculty, staff, and students are informed, engaged, and aligned with institutional priorities.

- **4d. Student Recruitment Campaign Marketing Strategy**. Task the University MarCom Strategy Council to work with Admissions, Iowa State Online, and the Graduate College on more coordinated undergraduate and graduate student recruitment efforts that leverage data insights to target prospective students with tailored messages across varied channels.

- **4e. University-Wide Social Media Strategy**. Implement a university-wide social media strategy that strengthens brand visibility, fosters authentic engagement, and ensures consistency across colleges, divisions, and units. This strategy should establish governance standards and balance centralized oversight with localized content that showcases the breadth of the university's community and impact.

5. Develop MarCom-Related Standards and Guidelines

- **5a. Environmental Branding Standards**. Establish guidelines for ISU's physical and built environment to enhance first impressions, improve wayfinding, and ensure consistency and cohesion.

- **5b. Trademark Licensing Protocols**. Adopt a risk-tiered approach that reserves the most stringent review for high-impact trademark licensing matters while permitting routine projects to move through expedited channels.

- **5c. Standards for Websites and Social Media Accounts**. Set — or re-emphasize — clear standards for web themes, design, management, and oversight of university-affiliated websites and social media accounts, addressing identity, quality, accessibility, security, and compliance. In addition, conduct an inventory and analysis of existing accounts to assess value to the unit and the university, mitigate reputational risk and ensure alignment with university priorities.

- **5d. Establish a MarCom Process Review**. Evaluate MarCom processes to identify opportunities for streamlining and increased efficiency.

- **5e. Clarify MarCom Roles, Responsibilities, Staffing**. Task MarCom leads with defining MarCom-related roles and responsibilities within their areas. An aspirational goal would to be to establish staffing guidelines based on relevant factors that might include size of unit, budget, etc.

6. Build Capacity Centrally and University Wide

The Segal Group's Communications and Constituent Engagement report recommended creating a multi-year plan to increase University Marketing and Communications staffing levels to those of peer institutions. The report also recommended exploring interest in piloting new partnerships between University Marketing and Communications and established campus units.

- **6a. Expanding the Central MarCom team**. Create a plan to increase University MarCom staffing levels comparable to peer institutions.

- **6b. Specialized MarCom Hubs**. Establish specialized hubs (discussed by the working group as "centers of excellence") that provide expertise, training, and resources to the university and distributed units. This operating model represents a centralized approach to providing specialized expertise, guidance, and resources to elevate MarCom across the institution. Rather than taking over all MarCom work, various hubs set standards, will help build capabilities, and support distributed teams. A list of recommended hub functions includes:

    - **Issues and Crisis Management.** Lead the university's response to emerging issues, controversies, or crises. Develop crisis communication protocols and escalation pathways. Draft statements and key messages. Coordinate cross-unit communication to ensure consistent messaging during crises. Advise university leadership on reputational risk and mitigation strategies. Conduct after-action reviews to strengthen preparedness for future issues.

    - **Strategic Communications.** Craft and oversee institution-wide messaging strategies. Develop key content for flagship campaigns (student recruitment, advancement, reputation building). Provide editorial oversight for major publications and digital channels. Telling the university's research story.

    - **Branding and Marketing Strategy.** Define and maintain brand standards (logos, colors, typography, templates)**.** Develop messaging frameworks and tone of voice guidelines**.** Ensure consistent application of brand across all channels and units**.** Use analytics to evaluate the effectiveness of marketing campaigns and communication efforts and provide dashboards and insights to colleges/divisions/units.

- **Collaboration and Campaign Coordination.** With other university partners, manage Salesforce and a university shared calendar. Facilitate alignment across colleges, divisions, and units. Develop coordinated campaign calendars to reduce overlap and maximize impact. Partner with distributed teams on major cross-institution initiatives.

- **Consulting and Capacity Building.** Provide consultation and coaching for unit-based MarCom teams. Coordinate training programs on branding, communications, and digital best practices. Create toolkits, templates, and resources for distributed staff and faculty.

- **Media Relations.** Serve as the primary contact point for journalists and media outlets. Develop and maintain relationships with key reporters and editors. Coordinate press releases, media advisories, and official statements. Provide media training and coaching for university leaders and subject matter experts. Proactively pitch stories that elevate the university's reputation and expertise. Monitor media coverage and public sentiment and provide regular reports to university leadership. Benchmark against peer institutions on media presence and reputation.

- **Creative Services.** Serve as a consultative partner to colleges, departments, and units. Centralize creative tools, software licenses, and asset management systems. Design and produce creative assets useful for campaigns, events, websites, social media, and university-wide initiatives, including drone footage, graphic design, photography, videography, and web design.

- **Digital and Social Media Strategy.** Govern web standards, design, and accessibility. Establish guidelines for social media accounts and content. Monitor digital presence to ensure consistency, compliance, and reputational protection.

- **6c. A Centralized Collection of Digital MarCom Asset**s. Provide a centrally managed library of approved assets (drone footage, graphics, music, photos, templates, video, wordmarks) to ensure quality and brand alignment.

- **6d. A University Intranet**. Enhance collaboration and information sharing by partnering with ITS to explore options for developing a university intranet or similar solution, designed to provide a secure internal platform that centralizes access to communication, policies, and resources.

- **6e. Uniform Adoption of Salesforce as a Communication Platform.** Consolidate all communication efforts within Salesforce, a robust customer relationship management platform to improve efficiency, coordination, consistency, analytics, and stakeholder engagement while reducing costs associated with maintaining multiple platforms.

7. Standardize Staff Competencies and Capabilities

- **7a. Standardized MarCom Titles and Career Paths**. Apply consistent classifications and compensation structures to distinguish dedicated MarCom roles from partial assignments and promote equity, clarity, and accountability.

- **7b. MarCom Competencies and Hiring & Onboarding Protocols**. Ensure that MarCom employment candidates are evaluated by those with MarCom expertise, consider developing core competencies for each MarCom role and implement comprehensive onboarding programs for new hires.

8. Improve Organizational Alignment and Coordination

- **8a. Clear Roles and Responsibilities**. Define roles and responsibilities at each level of the university to ensure accountability and reduce duplication or confusion.
- **8b. Printing Services Partnership**. Improve coordination between Printing Services and University Marketing and Communications to ensure all printed materials reinforce university brand and messaging strategies.

Moving Forward: Implementation

Implementing these changes will require visible support from senior university leadership, especially the president and provost, as well as a deliberate, well-structured implementation plan that integrates robust change management and communication strategies. The communication plan should clearly articulate the benefits of the new model for the university's success as well as the individual benefits that will accrue to MarCom professional, institutional leaders, and individual faculty and staff.

While a phased approach to implementation will be necessary, the working group recommends establishing new reporting relationships in the short term so the revised model is in place and can be viewed by the incoming president as a positive step in the right direction for university marketing and communications.

Appendix A: Working Group Members

College of Agriculture and Life Sciences	Andy Zehr
College of Business, Ivy	Michele Appelgate
College of Design	Heather Sauer
College of Engineering	Breehan Gerleman
College of Health and Human Sciences	Brittney Rutherford
College of Liberal Arts and Sciences	Amy Juhnke
College of Veterinary Medicine	Dave Gieseke
Senior VP and Provost	Rob Schweers
Senior VP Student Affairs	Katy Cran
Admissions	Erica Fischer
Extension and Outreach	Carol Heaverlo (Working Group Chair)
Extension and Outreach/UMC	Natasha Neal
Iowa State Online	Tracy Schlater
University Marketing and Communications	Brian Meyer
University Human Resources	Dwaine Heppler
University Human Resources	Emma Mallarino Houghton

Appendix B: Summary of Working Group Discussions

Reinforcing several of the findings in Segal's 2025 communications and constituent engagement assessment, the working group noted that challenges in the following areas are limiting the effectiveness of the University's MarCom strategy.

1. Structure and Staffing

- University Marketing and Communications is currently understaffed to adequately serve demands to achieve goals for a more cohesive, consistent and effective strategy that unifies campus.

- Key MarCom leaders across campus (including college/division/unit leads) lack the capacity to fully meet the requests they receive from those they serve or to pursue more proactive and innovative approaches to advance university priorities.

- The quality of MarCom outputs can be compromised by the lack of established competencies and hiring standards for those tasked to perform this work in smaller campus units (e.g., departments, centers, programs, etc.). Also, MarCom activities at these levels are frequently assigned to individuals without formal MarCom expertise. Many of these individuals may be unfamiliar or uninformed with ISU branding standards or the resources available to guide their work. As a result, efforts are not consistently aligned or coordinated with broader university, college, division, or unit goals.

- MarCom roles are inconsistently classified and compensated across the university. Many staff have primary, non-MarCom roles yet hold fractional MarCom responsibilities. Most senior or key MarCom leads juggle multiple responsibilities that extend well beyond marketing and communications. This lack of consistency and role clarity could serve as a barrier to any efforts to unify MarCom functions.

2. Coordination and Strategy

- Campus leaders may direct or task MarCom leads and staff to take actions that conflict with university brand standards, which undermine strategic resource use and put consistency, reputation, and effectiveness at risk.

- Several distributed MarCom leaders are seeking a stronger relationship with University Marketing and Communications to enhance coordination, better leverage resources, secure support and authority for maintaining brand integrity, and have a greater influence on institutional strategy.

- It was noted that there are opportunities for improved collaboration and alignment with Printing Services and Trademark Licensing Office, both key MarCom partners, that could improve MarCom strategy effectiveness.

- There are few effective campuswide mechanisms to share MarCom resources.

- In smaller units (e.g., departments, centers, programs, etc.), MarCom approaches — including social media, newsletters, webpages, etc.) often dilute or compromise the university's brand, drain resources, and yield a limited return on investment due to misalignment with strategy, lack of resources/specific subject matter expertise.

- There is an opportunity to improve coordination of communication and alignment on alumni communications between the Alumni Association/Foundation and its university MarCom partners.

3. Student Recruitment

- Given the university's resource management model, deans and other campus leaders expect their MarCom teams to be highly focused on student recruitment.

- Admissions' coordination with college MarCom leads has improved recruitment-related alignment, but communications challenges persist with smaller units. As a result, prospective students may continue to receive uncoordinated, fragmented messages from multiple sources.

- There is no overarching strategy guiding graduate recruitment and how MarCom strategy can effectively support it.