Media, Marketing and Events Management Review Committee

March 1, 2010

FINAL REPORT

Executive Summary

Provost Sabah Randhawa convened a group in September 2009 to examine the media, marketing and events management activities, staff and resources across the campus. The committee consisted of:

- Mark McCambridge, Vice President, Finance and Administration and Chair
- John Greydanus, Director, Outreach and Media Services, Information Services
- David King, Associate Provost, University Outreach and Engagement
- Ilene Kleinsorge, Dean, Business
- Luanne Lawrence, Vice President, University Advancement

The Provost outlined the committee’s charge:
1. Compiling an inventory of OSU media services, FTE, and resources in the context of the needs of the University;
2. Creating a core service center for technical marketing assets at the University level that includes technical resources associated with videography, photography, technical writing, graphic design, web development, as well as outsourcing management for these types of services;
3. Compiling an inventory of OSU events services, FTE, and resources in the context of the needs of the University;
4. Consolidating events services functions across the University with Conferences and Special Events;
5. Monitoring progress and budget savings.

The Provost outlined a budget savings goal of $700,000 from the committee’s work.

The group met throughout the fall terms and completed its work for review by the Provost on December 22, 2009. What follows is a response to the given charge.

Proposals

The committee has developed a set of proposals that has evolved over time in the discussion. Initial ideas focused on decentralized marketing pods in each of the newly formed University academic divisions along with the division of Outreach and Engagement and the division of Student Services. Upon further discussion it was apparent this approach would be difficult to fund and several of the units brought forward differing levels of support that would be needed for mar-comm functions (see Appendix D). A new approach evolved, which includes a series of guiding factors:

- Marketing liaisons to University Advancement should be established in each division or unit
• Analysis of division and college needs for marketing support will help develop the ultimate structure
• In some cases college and division leadership are willing to support centralizing resources to support marketing, and in some cases—especially where significant resources have already been committed to marketing and communications—college and division leadership are less willing
• The proposals on the next several pages are similar in that they all recommend a Marketing Liaison in each unit, but are also designed to be responsive to the unique and differing marketing needs from college to college and division to division.

Next Steps
• The Provost will be asked for a mid-term assessment to make sure the committee is headed in an acceptable direction.
• Luanne Lawrence will meet with individual college deans and division leaders to ascertain the level of savings that can be accrued through FTE reduction in existing E&G funded and college-based marketing staff. The committee has heard estimates that there could be as much as $8 million being spent on marketing and communications in total across campus. Also there have been estimates that as many as 60 FTE could be reviewed for possible consolidation and reduction. Luanne’s meetings will attempt to assess the reality of these estimates.

Additional Issues
There has been some discussion within the committee on the definitions of the terms marketing and communications. One point of view is that there is significant difference between the two terms. Another point of view is that they are more similar than different and all available positions related to both fields should be included in this exercise. For the purposes of this report, we are assuming that well-trained communications professionals can, in fact, produce effectively when asked to develop marketing products, and vice versa. However, there is recognition that some will see the functions as separate and very different.

This on-going discussion continues to point out the critical importance of bringing in a professionally trained senior-level marketing strategist. We will never have enough people to segregate the communications and marketing efforts completely; however with focused leadership, when our producers cross from one realm to the other, they will have the guidance to be effective in both.

Also, in the ongoing discussion, the concept of possible ad hoc innovation teams that draw from any and all marketing and communication resources on campus has been discussed. Although we have yet to find a method for establishing these teams and what topics they might most affectively address, the committee will continue to review possible development options.
1. **Compiling an inventory of OSU media services, FTE, and resources in the context of the needs of the University; and**

2. **Compiling an inventory of OSU events services, FTE, and resources in the context of the needs of the University.**

With the assistance of Human Resources, the Committee received and reviewed listings of staff who work in the areas of media, marketing and events. That list is found in Appendix A, and while not completely accurate, serves as a reflection of the staffing resources within these areas across the University.

Actual marketing and communications expenditures associated with these areas are currently difficult to assess. The best attempt at budgets related to these areas that are not dedicated to salary and OPE was compiled by Lipman Hearne in May 2009 and is found in Appendix B. The list is incomplete with many units not completing the survey or that portion of the survey.

While not fully reflective of the resources in media, marketing and events, based on these two sources, expenditures ranges are:

**Salary**

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>E &amp; G</td>
<td>$3,655,000</td>
</tr>
<tr>
<td>AUX</td>
<td>760,600</td>
</tr>
<tr>
<td>SWPS</td>
<td>902,500</td>
</tr>
<tr>
<td>Grants</td>
<td>229,400</td>
</tr>
<tr>
<td>Des. Ops</td>
<td>168,000</td>
</tr>
<tr>
<td>Endowm.</td>
<td>50,000</td>
</tr>
<tr>
<td>Gift Fund</td>
<td>292,400</td>
</tr>
<tr>
<td><strong>Sub Total</strong></td>
<td>6,057,900</td>
</tr>
<tr>
<td>OPE</td>
<td>2,059,686</td>
</tr>
<tr>
<td>S &amp; S</td>
<td>775,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$8,892,58</strong></td>
</tr>
</tbody>
</table>

2. **Creating a core service center for technical marketing assets at the University level that includes technical resources associated with videography, photography, technical writing, graphic design, web development, as well as outsourcing management for these types of services.**

The committee put forward to the Provost’s Council a “Marketing Center” concept that was originally considered a viable starting point for this goal. The Center idea was presented to Provost’s Council in November 2009 and there was positive discussion. However, in separate conversations, two committee members learned that three of the major units expressed major concerns about the centers. The format of the centers and proposed units can be found in Appendix C.

In order to address concerns offered by the three units, the following proposal is more uniquely suggested to support the anticipated needs of the various colleges, divisions and departments at Oregon State University for marketing, communications and events support.
### Staffing Suggested Plan

**a. Division of Arts and Science (proposed in-unit staffing: 2):**

<table>
<thead>
<tr>
<th>Current staffing within Division</th>
<th>One FTE; one ¾ FTE; one 2/3 FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suggested Staffing within Division</td>
<td>2.5 FTE – all functioning primarily as writers</td>
</tr>
</tbody>
</table>

**Consideration**

It is recommended that the division has an FTE professional who serves as the marketing liaison with the Division of University Advancement. That individual could be one of the writers proposed above.

It is suggested that mar-comm staffing for the University Honors College could also be satisfied through this staffing structure.

**Additional Staffing**

The committee would recommend that this Division receive support for graphic design, Web development, multi-media and events through University Advancement. To support this additional work, the following UA staff would need to be added:

- 1 FTE graphic designer,
- 1 - .5 FTE events planner,
- 1 - .5 multi-media producer, and
- 1 - .25 Web developer

### Details

**College of Liberal Arts**

The College of Liberal Arts currently has three staff working in the mar-comm areas: One FTE; one ¾ FTE; one 2/3 FTE. It is suggested that CLA needs the assistance of one FTE writer who can produce the college newsletter and online communications as well keep content on the Web site updated.

**College of Science**

The College of Science currently has no staffing in the mar-comm areas. It is suggested that CoS needs the assistance of one FTE writer who can assist the dean with various communications, develop social media strategies and maintain the college Web site.

**College of Education**

The College of Education currently has no staffing in the areas of marketing, communications, media or events. It is suggested that the College needs the assistance of a half-time writer who can produce the college newsletter, develop social media strategies and update content on the Web site.

**University Honors College**

The UHC currently has no staffing in the areas of marketing, communications, media or events.

*Mar-Comm Budget for Division of Arts and Science: TBA*
### Division of Business and Engineering (proposed in-unit staffing: 6):

<table>
<thead>
<tr>
<th>Current staffing within Division</th>
<th>8 FTE; one ¾ FTE</th>
</tr>
</thead>
</table>
| Suggested Staffing within Division | It is suggested that this Division consider a shared marketing center model that consists of 4 FTE:  
  • A marketing liaison for each college who could also serve as a writer for noted needs below;  
  • At least one FTE for events planning for the deans;  
  • Shared writer for both colleges to support liaison(writer with magazine; online communications; social media |
| Additional Staffing | The Committee would recommend that this Division receive support for graphic design, Web development and multimedia through University Advancement. To support this additional work, the following UA staff would need to be added:  
  • 1 FTE Graphic Designer  
  • 1 - .5 FTE multi-media manager  
  • 1 - .25 Web developer |
| Consideration | It is realized that the CoB has separately funded programs that employ two FTE in communications areas, therefore those support positions would be in addition to the above recommendations. |

The mar-comm functions for this division are larger because both colleges function in a professional, external environment that requires greater resources to build and maintain reputation. Both colleges have historically invested in and prioritized this area.

**Details:**

**College of Engineering**

The College of Engineering currently has two staff with some portion of their responsibilities supporting mar-comm activities. It is suggested that CoE needs the assistance of one FTE writer who can assist the dean with Momentum, the college newsletter; updating Web sites; and engaging in social media.

**College of Business**

CoB currently has 5 ¾ FTE working in some capacity in mar-comm or related areas.

**Mar-Comm Budget: TBA**
### Division of Health and Wellness (proposed in-unit staffing: 3.75)

<table>
<thead>
<tr>
<th>Current staffing within Division</th>
<th>3 FTE; 2 - .25; and 1 - .5 professionals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suggested Staffing within Division</td>
<td>It is suggested that the Division add one FTE writing position to support .5 CoP and .5 CVM needs. It is also suggested that this Division designate one of the writing positions as a marketing liaison with University Advancement.</td>
</tr>
<tr>
<td>Consideration</td>
<td>It is recommended that the division has an FTE professional who serves as the marketing liaison with the Division of University Advancement. That individual could be one of the writers proposed above.</td>
</tr>
</tbody>
</table>
| Additional Staffing | The committee would recommend that this Division receive support for graphic design, Web development, multi-media and events through University Advancement. To support this additional work, the following UA staff would need to be added:  
  - .5 FTE Graphic Designer,  
  - 1 - .25 Web Developer;  
  - 1 - .25 multi-media manager and  
  - 1 - .25 events planner |

**Details:**

**College of Health and Human Sciences**

HHS currently has approximately 2.25 staff supporting mar-comm/events activities, with the intention of downsizing one of those FTE effective July 1, 2010. It is suggested that the 1.25 FTE staffing is the right foundation for the college.

**College of Pharmacy**

CoP currently employs 2.0 FTE who work in related areas of communications. One is responsible for alumni relations work in the Portland market for the college and the other dedicates a small portion (estimating .25) of her time to the college newsletter. It is suggested that the college consider a .5 writer dedicated to online and print publications, Web site content and social media.

**College of Veterinary Medicine**

CVM currently employs 3 individuals with some portion of their work in the mar-comm area. One functions as a full-time graphic designer; another as a marketing liaison and support person at approximately .5; and the third is a public information assistant with unknown responsibilities (and will count as an FTE above, but may need to be adjusted). It is suggested that CVM needs the assistance of one .5 FTE writer who can support the online newsletter and related publications, Web content and social media efforts.

*Mar-Comm Budget: TBA*
### Division of Earth Ecosystems

<table>
<thead>
<tr>
<th>Current staffing within Division</th>
<th>College-based E&amp;G staffing:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• CAS—portions of 2.0 FTE</td>
</tr>
<tr>
<td></td>
<td>Non E&amp;G, grant, Federal, State Line funding:</td>
</tr>
<tr>
<td></td>
<td>• Forestry—portions of 4.0 FTE</td>
</tr>
<tr>
<td></td>
<td>• COAS—portions of 1.0 FTE</td>
</tr>
<tr>
<td></td>
<td>• CAS AES—portions of 2.5.0FTE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Suggested Staffing within Division</th>
<th>Recommend that the division identify 0.5FTE Marketing Liaison.</th>
</tr>
</thead>
</table>

#### Consideration

Because full services for graphic design, multi-media and Web are available within the related Outreach marketing units, it is recommended that all support services be provided through this area for CAS. This reflects a change from current practices in which University Advancement has supported these needs for CAS-based marketing and communications activities.

For Forestry and COAS, it is recommended that all graphic design, events, multi-media and Web services be provided through University Advancement.

### Additional Staffing

The committee would recommend that in this Division, COF and COAS receive support for graphic design, Web development, multi-media and events through University Advancement. To support this additional work, the following UA staff would need to be added:

- 1.0 FTE Graphic Designer,
- 1 - .25 Web Developer;
- 1 - .25 multi-media manager; and
- 1 - .25 events planner

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**Details:**

**College of Agricultural Sciences**

Within the College of Agricultural Sciences, the Agricultural Experiment Station is a line-item state budget funded unit considered one of three Statewide Public Service units. Communication support for AES and the other “Statewides” is part of a newly integrated Educational Outreach unit within the OSU Division of Outreach and Engagement.

Portions of the time of two individuals currently support the E&G-funded marketing needs of CAS.

**College of Forestry**

COF currently employs an estimated three individuals who appear to have a minimal portion of their responsibilities in marketing for the college. It is suggested that the College consider having one individual fully supportive of college-level marketing activities who serves as a writer and a division liaison to University Advancement. The Forest Research Laboratory within COF is also one of the state-line item funded “Statewides.”
**College of Oceanic and Atmospheric Science**

COAS currently employs 1.0 FTE who also functions as a writer. It is suggested that this is appropriate staffing under this suggested plan.

**Marketing Communication Budget for Division of Earth Ecosystems: TBA**

**e. Outreach and Engagement**

In a process of integration begun in March 2009, the Division of Outreach and Engagement has developed a combined unit that has built from the OSU Extended Campus and the Department of Extension and Experiment Station Communications. This unit is funded by multiple non-E&G funding sources including state line item funding for AES, Extension and the FRL, as well as cost recovery funding within the Ecampus budget model. A graphic depiction of the integrated unit is attached as Appendix E.

For marketing purposes, Sea Grant Communications can be considered under the umbrella of the Outreach and Engagement Division.

<table>
<thead>
<tr>
<th>Current staffing within Division</th>
<th>Marketing Staff within</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Extended Campus—One professional faculty, three classified positions</td>
</tr>
<tr>
<td></td>
<td>Extension—portions of six individuals.</td>
</tr>
<tr>
<td></td>
<td>Sea Grant—portions of five individuals</td>
</tr>
</tbody>
</table>

| Suggested Staffing within Division | Basically in the integration process, this division has formed a Communications Center similar to that proposed in the earlier report of this Committee. By combining talent and resources from the four areas, there would be a smaller, more efficient and cost effective (shared equipment, professional development, creative energy with better output) unit that could serve all entities in a shared environment. This center would consist of writers, designers, Web developers, multi-media and events. |

| Consideration | Under this scenario, it is probable that no UA services would be required. However, it is suggested that one individual should have 0.5FTE responsibilities as a marketing liaison to ensure integrated and coherent branding of the units with the university. |

**Details:**

**Division of Outreach and Engagement: E-Campus**

E-Campus currently employs one professional faculty and three classified positions with some portion of their responsibility dedicated to marketing. These positions are funded by cost recovery funds as part of the Ecampus business model.
Among the approximately 16 FTE in Educational Outreach (see attached) six have some marketing responsibilities. All these positions are funded by non-E&G funds from the Extension and AES state budget line items.

Forest Research Lab Communications
FRL Communications includes 4 individuals who appear to have some minimal portion of their responsibilities dedicated to marketing and communications activities.

Sea Grant
Sea Grant Communications includes 5 in individuals who appear to have some portion of their responsibilities dedicated to marketing and communications activities.

Mar-Comm Budget for Division of Outreach and Engagement: TBA

<table>
<thead>
<tr>
<th>Current staffing within Division</th>
<th>10 who appear to have at least some portion of their position dedicated to mar-comm activities.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Suggested Staffing within Division</td>
<td>There is a great deal of diversity among the audiences served by these units. So, separate communications liaisons for each function make sense. Many in the Division, with budget limitations, make use of student employees for core functions including graphic design and Web development. There is also a high volume of marketing materials because of the nature of these functions. For this reason, it is recommended that the Division look to create a core Marketing Center along the structure of the original proposal that intentionally staffs writing, graphic design, multi-media and events with professionals who have staff consisting of students who execute templates and more polished design structures. In addition, this Division continues to need the services of a full-time market research professional that assists with data collection for various required reports.</td>
</tr>
<tr>
<td>Consideration</td>
<td>It is recommended that the division assigns one FTE professional from within this unit who coordinates the entire group to find synergies (a collaborative unit of this kind does exist in a looser structure) and who serves as the official marketing liaison with the Division of University Advancement. This individual will be held accountable for quality of all Student Affairs materials and collateral as well as compliance with university branding guidelines and standards.</td>
</tr>
<tr>
<td>Additional Staffing</td>
<td>The committee would recommend that this Division receive support for graphic design, Web development, and events through University Advancement. To support this additional</td>
</tr>
</tbody>
</table>
work, the following UA staff would need to be added:

- .5 FTE Graphic Designer to create templates for Web and print collateral,
- 1 - .25 Web Developer;
- 1 - .25 events planner

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**Mar-Comm Budget for Division of Student Affairs: TBA**

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g. **OSU Foundation and OSU Alumni Association**

While originally proposed as a Marketing Center, a Committee member discussed the concept with representatives who determined that combining talent and resources in these areas was not possible at this time.

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**Proposed: University Advancement Increased Staffing:**

<table>
<thead>
<tr>
<th>Division/Unit</th>
<th>Marketing</th>
<th>University Events</th>
<th>Web Communications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts and Science</td>
<td>1.0 Graphic/ Web Designer</td>
<td>.5 Events Planner</td>
<td>.25 Web Developer .5 Multi-Media Producer</td>
</tr>
<tr>
<td>Business and Engineering</td>
<td>1.0 Graphic Web/Designer</td>
<td></td>
<td>.25 Web Developer .5 Multi-Media Producer</td>
</tr>
<tr>
<td>Health and Wellness</td>
<td>.5 Graphic/Web Designer</td>
<td>.25 Events Planner</td>
<td>.25 Web Developer .25 Multi-Media Producer</td>
</tr>
<tr>
<td>Earth Ecosystems</td>
<td>1.0 Graphic Design</td>
<td>.25 Events Planner</td>
<td>.25 Web Developer .25 Multi-Media Producer</td>
</tr>
<tr>
<td>Outreach and Engagement</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Student Affairs</td>
<td>.5 Graphic Design</td>
<td>.25 Events Planner</td>
<td>.25 Web Developer</td>
</tr>
<tr>
<td>University Advancement Other Staffing Needs for this plan</td>
<td>1.0 Marketing Strategist (senior level) 1.0 Marketing writer/editor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Staff: 10</td>
<td>6</td>
<td>1.25</td>
<td>2.75</td>
</tr>
</tbody>
</table>

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4. **Consolidating events services functions across the University with Conferences and Special Events.**

The Committee recommends the continued process of managing events separately through Conference Services and University Events. There is a clear mission distinction between the two entities.

Conference Services’ mission is to provide full-services for OSU-related conferences that occur in the LaSells-Stewart Center and off-campus. They host events that are not conference-related only when
occurring in their own facility. The department functions as an auxiliary and as such, it a revenue-driven enterprise that is housed well in Finance and Administration.

University Events’ portfolio is much broader, providing a variety of events management services mostly at the institutional and presidential levels, but increasingly at the college and department levels. University Events is the core marketing function where the university intersects with its various publics. Events management is a core function of University Advancement and provides the personal engagement that round out the marketing strategies of the university.

Both functions, while in the events area, are distinctive in the clients they serve, the services they provide and the end-results they produce.

5. **Monitoring progress and budget savings.**

At the time of the report, there was no known way to calculate the budgets of the units as dedicated to functions including writing, design, Web development, multi-media and events management. Further consideration will need to be given to calculating those expenditures to look for efficiencies and synergies. It is anticipated that this proposed structure would give the leadership the ability to explore these budget figures much more comprehensively at the unit level.

The May 2009 report from Lipman Hearne confirmed that outsourcing for marketing and communications outside of OSU Foundation, OSU Alumni Association and University Advancement totaled nearly $375,000 for services including advertising; print collateral production, market research and graphic design. In addition, approximately $46,500 was reported for events outsourcing. With all budgets combined, Lipman Hearne determined that those participating in the survey and interview were spending approximately $775,000 in mar-comm activities.

The Committee recognizes that this is incomplete data and does not reflect either the university as a whole (only those who chose to respond) or the recent round of budget reductions. However, even with these conditions, it feels that this is an accurate estimation of spending.
Conclusion

The next steps proposed to the Provost after his review will be determining real staffing and resource situations that would support the models proposed. At this time the committee is recommending these models as ways to increase marketing and communications services at a more efficient level and that ensures full integration of the OSU brand while realizing substantial cost savings.

This report does not specifically speak to related areas in Division of Information Services including Web hosting/security, Drupal support and training and digital asset management. The Committee would like to acknowledge if new mar-comm models are adopted, there may be increased reliance on departments like Media Services, Central Web Services and the University Library.

This report also does not address some additional areas that employ professionals in these fields including: University Library, Athletics, Media Services, Printing and Mailing and the Research Division.

Appendices Attached

Appendix A: Lipman Hearne May 2009 Report
Appendix B: Staff Structures
Appendix C: Marketing Center Model and Divisions
Appendix D: Memo from Statewide Deans and Directors
Appendix E: Integration Design Adopted For Extended Campus/Educational Outreach unit in the Division of Outreach and Engagement